



**REQUEST FOR QUALIFICATIONS
FOR
DESIGN-BUILD TEAMS**

August 18, 2023

For

**Washington State University
Building Systems Infrastructure Upgrades**

By

Facilities Services, Capital

Statement of Qualifications Deadline: September 7, 2023, 3:00 pm

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APPENDICES**INFORMATIONAL ITEMS**

- 1. WSU Design Guidelines and Design & Construction Standards downloaded August 18, 2023
<https://facilities.wsu.edu/facilities-services-capital/design-standards/>
 - 1.1. Project Deviation Log (provided upon award).
- 2. Project Manual August 18, 2023
- 3. WSU IT Standards August 18, 2023 (Include if other campus and have different standards)

I. INTRODUCTION**ABOUT THE PROJECT**

Washington State University is soliciting written Statements of Qualifications (SOQ) from Design-Build Teams interested in providing design and construction services for the Washington State University Building Systems Infrastructure Upgrades program. The University is utilizing the Design-Build alternative public works contracting procedures authorized under chapter 39.10 RCW.

- The Design-Build Method brings value to university projects, transforming the relationship between designers and builders into an alliance that fosters collaboration and teamwork.
- This delivery method provides the opportunity to assemble the ingenuity of the industry in proposing innovative solutions.
- Design-Build provides opportunities to realize efficiencies in the complete delivery of university projects.
- Construction activities associated with these projects can be highly specialized and would benefit from a collaborative approach to design and construction methodologies.
- The projects selected provide opportunity for greater innovation or efficiencies between the designer and the builder.
- The Design-Build Method will streamline and simplify the Procurement and Execution Process.

Washington State University seeks collaborative partners who are committed to a progressive design-build process for the Building Systems Infrastructure Upgrades program. This process shall be truly integrated (design and construction mutually informing the development of the projects) and shall engage the university stakeholders in a process that will ensure a site- and campus-specific solution.

Teams may apply as a more traditional design-build team with a fully formed team or the prime proposer may choose to describe their plan to bring on partners after the selection process or could be a hybrid approach.

POINT OF CONTACT

All questions regarding this Design-Build Procurement shall be addressed to:

Kevin Poitra, Project Manager

kpoitra@wsu.edu

Phone: 509-335-4206

Design-Build Teams are cautioned that the 'Point of Contact' is the only person that shall be contacted throughout the Request for Qualifications (RFQ) and Request for Proposals (RFP) Phases. Any contact by Design-Build Team members with any other individuals, including those from the Selection Committee and their organizations and the Technical Consultants may result in the Team's SOQ and/or Proposal being declared non-responsive and not eligible for further consideration.

SELECTION COMMITTEE

The Selection Committee for both the RFQ and RFP Phase may consist of representatives from Washington State University, Faculty, Staff, the Department of Facilities Services, Technical Consultants, outside Industry Partners, Community Members or other applicable user groups. At this time, WSU has assembled the following individuals to serve on the selection committee to evaluate proposals. No contact with selection committee members other than the Point of Contact is permitted. Owner reserves the right to add or remove representatives at any time without notice.

Voting Participants

Jeff Lannigan WSU Facilities Services Associate Director of Utilities & Energy

Jeff is the Associate Director for Utilities and Energy with Facilities Services and has worked at WSU since 2000. Jeff oversees utility production and distribution, and energy procurement. In his prior role as a capital Project Manager, Jeff delivered over \$250 million in capital construction on the Pullman

Washington State University | Pullman, Prosser, Puyallup, & Spokane

campus. Jeff is a registered Mechanical Engineer, a native of eastern Washington state, and a WSU Alumni. Jeff will serve as a subject matter expert for this project.

Kevin Poitra WSU Facilities Services Project Manager

Kevin is a Project Manager/Construction Manager with Facilities Services and has worked at WSU since 2004. Recently, Kevin has been managing Design-Build projects related to MEP, BAS and Utilities. Kevin will serve as the Project Manager for this project.

Phil Johnson WSU Facilities Services Project Manager

Phil is a Project Manager Lead at WSU and has been working for Facilities Services for the past 8 years. Prior to his time at WSU, he spent 13 years working for a structural engineering company in Seattle as an engineer, project manager and associate principal. Phil is licensed in the State of Washington as both a professional engineer and structural engineer. In addition to managing design and construction projects at WSU, Phil is also engaged in long-term capital planning and energy management initiatives. Phil will serve as a subject matter expert for this project.

Rex Riggs WSU Facilities Services Maintenance Specialist 4

Rex has been with Facilities Services for almost 7 years and is currently the supervisor for the HVAC Controls Shop and Refrigeration Shop. Before coming to WSU, Rex was an HVAC controls contractor with a large industry vendor where he served as a technician, service, sales, and Project Manager. Rex obtained a bachelor's degree in industrial technologies from the University of Idaho as well as served 6 years in the United States Navy as an Electronic Warfare Technician. Rex will serve as a subject matter expert for this project.

Mark Bailey WSU Facilities Services Information Systems Program Director

Mark has been with Facilities Services for 3 years and manages the Facilities IT team as well as interfaces with the other IT groups at WSU. Mark has been in IT management for both public and private organizations for over 30 years. Mark will serve as the networking subject matter expert for this project as well as the liaison when other WSU IT groups must be involved.

Nolan Beal WSU Facilities Services Project Manager

Nolan is a Project Manager and has been with WSU Facilities Services for just under 1 year. Upon graduating from WSU with a bachelor's degree in mechanical engineering in 2017, he worked as a project manager/engineer for a fencing and metal fabricator. Nolan is an engineer-in-training and is actively working towards his professional engineering license. Nolan will assist with Project Management duties for this project.

Non-Voting Participants

Brian Funke Facilities Services, Construction Manager

Brian has been with WSU Facility Services Capital for the past 19 years as Construction Manager/Electrical Examiner and Project Manager for Electrical Infrastructure Projects. Brian attended a 4- year Electrical Apprenticeship School at LCSC. Prior to being employed by WSU, Brian worked on large constructions sites both as an Electrical Apprentice & Journeyman and finished as an Electrical Project Forman/Supervisor for larger scale construction projects. Brian will serve as the Construction Manager for this project.

ABOUT WSU FACILITIES SERVICES

Facilities Services is a service organization that plans, designs, constructs, operates, and maintains the physical facilities and environments of the University at its Pullman, Vancouver, Tri-Cities, Everett, and Spokane campus locations, as well as research stations throughout the state. With a dedicated staff of over 400 individuals, they also operate, maintain, and improve the Pullman Campus's buildings, grounds, utilities, and related services.

The integration of the people maintaining and constructing the University's facilities is at the heart of Facilities Services. The whole of facilities strives for responsible stewardship, and future focused design and construction.

II. PROJECT INFORMATION

DESCRIPTION

Washington State University is seeking a design-build partner who is committed to collaboratively developing a unique and tailored solution with the University stakeholders. The University is seeking a team which can develop a thoughtful, meaningful, functional, solution which serves all the program needs and strengthens the campus.

The nature of the WSU progressive design-build process is to work with a committed team of skilled designers and builders to develop this contract program. The design-build team must be sufficiently familiar with the program parameters such that they are able to commit to achieving the programmatic goals working with the University team. WSU is not seeking a developed solution through the RFQ and RFP process, but rather is seeking a team with whom we can collaborate and develop the most successful building systems/infrastructure upgrade solution that meets the needs of the program. WSU is seeking teams who demonstrate a very clear understanding of the distinction between an immediate Design-Build solution versus a commitment to a process of exploration.

Washington State University has initiated a campaign to modernize facilities, reduce deferred maintenance and improve operations. The primary goal of this project is to upgrade mechanical, electrical, and plumbing building systems (including the building automation system controls network and panels) in various buildings on the Pullman Campus, Spokane Campus and the WSU Research Extension Centers. We are looking for a Design-Build Team with experience managing multiple projects under one Design-Build contract. In addition, the Design-Build team must also have experience utilizing multiple trade partners, as necessary, to address different scope across multiple locations. The full Design-Build team must be able to provide a solution that encompasses the following guiding principles: deferred maintenance reduction, building system and infrastructure renewal, smart building technology implementation, energy savings, and BAS modernization.

The Design-Build team shall collaborate with WSU stakeholders to plan and execute effective solutions within the milestone schedule outlined below.

SITE VISITS

We do not anticipate providing site visits during the RFQ phase of the procurement.

PROCUREMENT AND PROJECT MILESTONE SCHEDULE

The anticipated schedule for procurement of the Project with construction completion date is indicated below:

- | | |
|---|----------------------------------|
| 1. Issue Request for Qualifications (RFQ): | August 18, 2023 |
| a. Deadline for Questions and Clarifications: | September 1, 2023 5:00 pm |
| b. <u>Statements of Qualifications due:</u> | September 7, 2023 3:00 pm |
| c. Announce Shortlisted Proposers: | September 13, 2023 |
| 2. Issue Request for Proposals (RFP): | September 20, 2023 |
| a. RFP Informational Meeting: | September 21, 2023 2:30pm |
| b. Finalists Interviews: Virtual | October 3-4, 2023 |
| c. <u>RFP Submittal deadline:</u> | October 12, 2023 |
| d. Announce Final Team: | October 19, 2023 |
| 3. Execution of the Agreement: | October 26, 2023 |
| 4. Construction Completion: | May 30, 2025 |

GUARANTEED MAXIMUM PRICE (GMP)

The Guaranteed Maximum Price (GMP) Design-Build budget for this Project will be \$6,530,000.00 The GMP shall include all design and construction costs, contingencies, indirect and reimbursable expenses, and fees to complete the Project. The GMP does not include Washington state sales tax, see Section 00 50 00 – Agreement between Owner and Design-Builder.

III. STATEMENT OF QUALIFICATION REQUIREMENTS AND CRITERIA**STATEMENT OF QUALIFICATIONS SUBMITTAL**

The SOQ submitted by responding Design-Build proposers shall include information documenting how the Design-Build Team meets the evaluation criteria below to achieve the collaborative nature of WSU progressive Design-Build process. SOQ elements will be evaluated using the weighted distribution identified below. Each Team's SOQ shall be in PDF format, with the page size set to 11 x 17 (A3) and limited to two pages (when printed) for all requested submittal information except for the Design-Build Team Resumes. Design-Build Team resumes shall be submitted on a single PDF page set to 11 X 17 (A3) (no other information may be included on this third page of the statement of qualifications). Font size to not be less than 10 point, no links within the content will be reviewed, and any pages beyond the three pages will not be reviewed.

1. Design-Build Team Organization and Responsibilities

- a. Title with project identification.
- b. Provide Design-Build Point of Contact name and address, including email and phone number for correspondence throughout the procurement process.
- c. Describe the proposed Design-Build Team for both design and construction portions of the Project, including team members, the organization, and the responsibility of each team member. Include a visual element that shows the relationship within the Design-Build Team.
- d. Provide abbreviated resumes of the key individuals working as the Design-build Team along with three references for each individual. Resumes to focus on experience relevant to this project and why they are being proposed for this project. (See note above for specific page submission requirements of resumes).

2. Design-Build Team Experience

- a. Provide the proposed Design-Build Team members' specialized experience and competence in managing multiple complex projects across a campus environment with numerous consultants and trade partners.
- b. Provide relevant past performance of Team members working on a highly collaborative integrated project team. Include type of project, delivery method, budget, construction duration, lessons learned, and what made this a highly functional team. Clearly identify which Team members were involved in these projects and their role.
- c. Demonstrate how the proposed members will work together to complement each other's strengths.

3. Project Approach

- a. Describe your overall approach to delivering this contract to meet the overall goals, engaging the stakeholders, and maximizing available resources.
- b. Describe the approach to managing the target budget and overall project schedule. Describe the tools, tactics and strategies that will be utilized in the approach.
- c. Articulate how the Design-Build Team will manage the design effort that maintains the project goals and stakeholder input.
- d. Approach to overall project management that includes preconstruction services, cost estimating, schedule adherence, team onboarding, risk management, and scope confirmation.
- e. Contracting approach with consultants and trade partners.
- f. Affirm that the terms and conditions of the Contract and General Conditions issued with the RFQ are acceptable, or if the Proposer takes exception to the documents the Proposer must specifically describe the reasons for the exceptions and provide alternative language for consideration by the University. The University makes no commitment that it will modify any of the terms of the Contract or General Conditions.

4. Business Equity and Diverse Business Inclusion History:

- a. Summarize the core concepts of your company internal and external diversity and inclusion plans. Briefly identify any strategies, resource commitments, and steps you take to address access to opportunities, capital and training for OMWBE, WBE, MBE, SBE, and VBE within your firm, sub consultants, subcontractors, suppliers, etc.
- b. Provide the following summary level data demonstrating the DB team's past performance in utilization of small business entities and office of minority and women's business enterprises certified business for a minimum of three projects within the last five years:
 - 1) Project Data:
 1. Total Project Cost (aka GMP, amount contracted to the project owner inclusive of DBs Work)
 2. Value of Work by OMWBE Certified Firms
 3. Value of Work by Qualified Firms (those firms who meet the definition but are not certified in the State of Washington, and all other certification types).
 4. Date of Award and Date of Completion (if applicable).
- c. Provide three example case studies which do not have to be part of the projects noted above to represent the Design-Build team's past performance in utilization of small business entities and office of minority and women's business enterprises certified businesses. Include as many of the items listed below in each case study as possible:
 - 1) Small or Diverse Business Firm Name
 - 2) Subcontracted Tier
 - 3) Type of Work Performed
 - 4) Certification Type
 - 5) Contract Value
 - 6) Length of time in business at the time of the project.
 - 7) How many times have you contracted with them previously and or since this project?
 - 8) What did you do to make them successful? Or not?
 - 9) Other items of interest.
- d. For the purposes of this RFQ the following definitions shall apply:
 - 1) OMWBE: Businesses certified by the State of Washington Office of Minority and Women's Business Enterprises.
 - 2) MBE: Identified but not certified Minority Business Enterprise; at least 51% minority owned.
 - 3) WBE: Identified but not certified Women's Business Enterprise; at least 51% owned by one or more women.
 - 4) SBE: Identified but not certified Small Business Enterprise; 50 or fewer employees or gross revenue of less than seven million dollars annually as reported on its state and federal tax returns over the previous three consecutive years.
 - 5) VBE: Veteran Business Enterprise; at least 51% veteran owned.

5. Safety, Financial, Legal – Pass/Fail

- a. Provide the safety and accident prevention record of the Design-Builder. Include other relevant information that documents their safety record, including TRIR and EMR ratings.
- b. Provide a list of all OSHA, WISHA, or other state safety agency citations and their dispositions for the past five (5) years.
- c. List the state of Washington design and construction licenses and registrations held by the Design-Build Team, the lead contractor, designer-of-record, and specialty sub-consultants.
- d. Provide evidence from a surety or insurance company (with a Best's Rating of A minus and VIII or better by A.M. Best Co.) stating that the Design-Builder can obtain separate performance and payment bonds in amounts not less than the GMP, which bonds will cover the Project and any warranty periods. If the Design-Builder is a limited liability company, joint venture or any form of partnership, specifically identify how bonds will be obtained and which member(s) and/or partner(s) will be providing such bonds.
- e. Describe any project that Design-Builder, lead contractor or designer-of-record were involved in within the past five (5) years that resulted in: (a) the assessment of liquidated damages against one of such parties; (b) one of such parties having received a notice to cure a default due to the party's non-performance or poor performance of the underlying contract; or (c) one of such parties being terminated for cause.
- f. Disclose past or current bankruptcies, convictions, debarments, or suspensions involving Design-

Builder, the lead contractor and the designer-of-record.

STATEMENT OF QUALIFICATIONS EVALUATION

The University, through a Selection Committee, will review SOQs submitted in response to this RFQ based on the evaluation criteria and weighting identified herein. The University reserves the right to reject any or all SOQs and may also check references from prior clients, contractors, suppliers, subcontractor, and consultants not explicitly identified within the SOQ.

Statements of Qualifications will be evaluated in accordance with the following weighted distribution:

1. Design-Build Team Organization and Responsibilities	35 points
2. Team Experience	35 points
3. Project Approach	20 points
4. Business Equity and Diverse Business Inclusion History	10 points
5. Safety, Financial, Legal	Pass/Fail
Total	100 points

STATEMENT OF QUALIFICATIONS SUBMISSION AND DEADLINE

Any addenda issued for this RFQ will be published at the following website address:

<https://facilities.wsu.edu/alt-pub-works/>

Respondents are responsible for checking the website prior to the submission of their SOQ for any addenda. If you are unable to download the addenda notify the Point of Contact. SOQs must be submitted via email in PDF Format no later than **3:00 PM on September 7, 2023**. SOQs are to be emailed to contracts@wsu.edu and copied to kpoitra@wsu.edu address. A confirmation of receipt will be sent to the submitting party, and a list of responding firms will be posted at the website above shortly after the submission time has passed. Respondents are responsible for ensuring and confirming receipt of the SOQ by the deadline stated above. SOQs received after the deadline will not be considered.

SELECTION OF RFP SHORTLIST

The Selection Committee will select the three highest ranked finalist proposers after a thorough review. These candidates will be invited to proceed to the RFP phase of the selection process.

If clear determination of the shortlist is not possible based upon SOQ's, the University may, at its discretion, invite the highest ranked respondents (no more than five) to an interview where Design-Build proposers will be asked to present more detailed information about their capabilities and qualifications. The pre-finalists will be responsible for paying for all their expenses in preparing for and attending their interview.

PROTEST PROCEDURES

Design-Builders shall provide written notification to the Vice President of Facilities Services, Capital of any protest within four (4) business days from the date the proposer was notified of the selection decision. Any protest received more than four (4) business days from the date notification was made shall not be considered.

IV. RFP SELECTION PROCESS

RFP RESPONSE PERIOD

The RFP will include a general description of the Projects including programmatic, technical requirements and University standards; functional and operational elements; and target budget and schedule for design and construction of the Project. The RFP Response will place emphasis on the design-build teams' approach to the projects including the following: design, contracting, cost control during design and

construction, schedule management, quality control, along with subconsultant and trade partner selection.

An important element of this RFP stage of the selection will be one virtual interview. The goal of this interview is to understand the working relationship and the design process of the design-build team. The interview session is anticipated to be a maximum of two hours in length. The University team wishes to understand the iterative, explorative nature of the design-build teams' process and how the process incorporates the established goals of the project. Issues relevant to this work session are an understanding of the breadth of critical issues and drivers that may influence the core understanding of the projects that make up the contract program; an exploration of programmatic elements that are seen as critical and opportunities for enriching the project; or other aspects of the program/site/context which may influence the evolution of a solution. The design-build teams' understanding of a project cost model, including opportunities within the model for meaningful alternatives and choices, is of great interest to the selection team. The design-build teams should be prepared to discuss cost and scope relationships during this exploratory process. This includes the teams' approach to the design deliverables during the design progression to show the progress of the team's ability to deliver within the established GMP.

The design-build proposer will have limited time to prepare for this interview. This is intentional, as the University wishes to respect the investment made by proposers pursuing this project and would like to see how the teams work together unrehearsed. The University believes that the dialogue and interaction at the interview should reflect the true iterative abilities and nature of the design-build proposer; to show a meaningful exploration of issues and ideas; to illustrate a process of establishing priorities through the consideration of choices and alternatives; and to demonstrate how the design-build team will engage the university team and facilitate a meaningful stakeholder-driven design process. The University wishes to see how the design-build proposers frame issues and choices, how the stakeholder group is engaged, how priorities are established, and how the design process may truly be transparent and understood such that the university stakeholders feel invested in the design as it develops.

The University seeks to engage the specific individuals with whom we will be working with during the design-build process. Consequently, design-build proposers shall limit attendees at the interview to those team members who will truly be involved in the development of the project, with no more than 6 representatives. At a minimum WSU will attend the interview with the entire Selection Committee, potentially bringing key stakeholders, Technical Consultants and Industry Partners as appropriate.

The finalist proposers will be responsible for paying all their own expenses associated with the Finalist Interview.

REQUEST FOR PROPOSAL EVALUATION

Proposals will be evaluated in total to determine which, in the opinion of the WSU Selection Committee represents the best overall fit for the university based on the requirements of the RFQ, RFP and any addenda published by WSU.

Proposals submitted by finalists will be evaluated in accordance with the following weighted distribution:

1. Team Dynamic	40 points
2. Design and Engineering Approach	30 points
3. Execution Plan	35 points
4. Project Specific Business Equity and Diverse Business Inclusion Plan	15 points
5. Schedule	10 points
6. Cost Analysis / Fee	10 points
7. Proposal Requirements	10 points
Total	150 points

HONORARIUM

Progressive Design-Build reduces the submittal efforts by the Design-Build team. The University acknowledges that there is a limited level of design required by the proposers to prepare for the Finalist Interview and would like to generate meaningful competition among proposers. Therefore, an honorarium in the amount of \$5,000.00 will be paid to each of the unsuccessful proposers upon award of the contract to the successful team.

CONTRACTING PROCESS

The final Design-Build contract shall be awarded in accordance with the processes and requirements set forth in the RFP and based on the procedures outlined in RCW 39.10.330. The selected finalist team will be promptly awarded an agreement.

WSU's Design-Build Agreement is characterized by Design Review Packages authorizing Design-Builder to proceed with each phase of the Project:

- Agreement Execution (based upon Project Approach)
Requires payment and performance bonds, insurance, and retention option for the entirety of the GMP (inclusive of sales tax). Design-Builder shall begin design in collaboration with Owner.
- Design Review Package: Project Confirmation Milestone
Milestone where the project intent, concept, program, goals, priorities, target value, and target schedule have been established to Owner's satisfaction. Project Manager authorized continuation to next phase of Design.
- Design Review Package: Design Documents Milestone
Milestone where the design has been completed to Owner's satisfaction. The trade partners are onboard, cost, scope and schedule have been defined, and the Design-Builder is ready to complete the Construction Documents. Project Manager authorizes continuation into the remainder of design and construction for the project.

V. SUPPLEMENTAL INFORMATION**CONTRACTING FORM**

The University will use a Design-Build, Cost plus fee with a GMP which is included herein for Design-Builder's review.

PUBLIC DISCLOSURE

This procurement will follow the newly approved Design-Build legislation amending RCW 39.10.330 and 39.10.470 pertaining to public disclosure:

"Proposals submitted by Design-Build finalists are exempt from disclosure until the notification of the highest scoring finalist is made in accordance with RCW 39.10.330(5) or the selection process is terminated."

END OF REQUEST FOR QUALIFICATIONS