Preventive Maintenance

“An ounce of prevention is worth a pound of cure.” – Ben Franklin
Why Preventive Maintenance?

• Accounts for building components
• Assess Conditions
• Provides opportunities to stay ahead of major problems or failures
What Should a Preventive Maintenance Plan Include?

• Inventory of Building Components
  • Equipment Condition, Age, Usage
  • Plan Inspections
• Schedule and standardization for routine maintenance
  • HVAC – Filters, Belts, Etc.
  • Lighting
  • Floors
• Prioritization
  • Critical Assets
• Work Order System
With a Preventive Maintenance Program

• Allows you to stay ahead of problems
• Extends the life of your facilities and its components
CONTRACTING BEST PRACTICES

IDAHO DEPARTMENT OF EDUCATION – MAY 8, 2024
PRESENTERS

Anna Sparrell
CM Company
Boise, ID

Michael Arrington
Starr Corp
Twin Falls, ID

Bryce Parker
Beniton Construction
Meridian, ID
AGENDA

• RE-CAP OF PRIOR WEBINAR
• QUALITY BASED SELECTION PROCESS
• CMA V. CM/GC
• WHO/WHAT/WHEN
• PRE-QUALIFYING CONTRACTORS
• QUESTIONS & ANSWERS
QUICK RE-CAP OF LAST WEBINAR

• THREE WAYS TO CONDUCT CONSTRUCTION
  • DESIGN – BID – BUILD
    • TRADITIONAL METHOD
    • HIGH LEVEL OF TRANSPARENCY
    • TIME CONSUMING
    • HIGH ADMINISTRATIVE BURDEN
    • REQUIRED TO SELECT LOWEST BIDDER
  • DESIGN/BUILD
    • HIRE ENTIRE TEAM IN ONE CONTRACT
    • GREAT FOR COMPLEX SYSTEMS
    • OWNER RESPONSIBLE FOR ALL CONTRACTS
RE-CAP CONTINUED

• QUALITY BASED SELECTION

• TWO CM OPTIONS:
  • CONSTRUCTION MANAGER AGENT (CMA)
  • CONSTRUCTION MANAGER/GENERAL CONTRACTOR (CM/GC)

• CAN BE USED FOR BOTH REPAIRS/MAINTENANCE & NEW SCHOOL CONSTRUCTION

• CM ENGAGED EARLY IN PROCESS

• CM PROVIDES EXPERTISE AND GUIDANCE

• CM/GC CONTRACT INCLUDES A GUARANTEED MAXIMUM PRICE (GMP)

• CM/GC RESPONSIBLE FOR ALL CONTRACTING

• OWNER REDUCES RISK OF OVERRUNS OR DELAYS
BEFORE WE START – SIDE QUESTION

• WHAT’S THE DIFFERENCE BETWEEN AN RFP AND AN RFQ?

• REQUEST FOR PROPOSAL:
  • OWNER LOOKING TO PURCHASE A SPECIFIC ITEM OR COMPLETE SPECIFIC PROJECT
  • USUALLY INCLUDES PRICE AS A MAJOR DETERMINING FACTOR

• REQUEST FOR QUALIFICATIONS:
  • OWNER LOOKING TO HIRE MOST QUALIFIED CANDIDATE
  • DOES NOT INCLUDE PRICE AS A DETERMINING FACTOR
QUALITY BASED SELECTION PROCESS

• OPTIONS! OPTIONS! OPTIONS!

• CONSTRUCTION MANAGER AGENT (CMA)
• CONSTRUCTION MANAGER/GENERAL CONTRACTOR (CM/GC)

• SINGLE PROJECT SOLICITATION
• BUILDING A LIST OF QUALIFIED CMAS OR CM/GCS FOR MULTIPLE PROJECTS
WHY CONSIDER HIRING A CMA

• PROCESS IS SIMILAR TO HIRING A CM/GC

• BRINGS A CONSTRUCTION PROFESSIONAL TO YOUR TEAM
  • LOYALTY TO OWNER
  • EXPERT TO HELP GUIDE THE PROCESS

• MAIN DIFFERENCES:
  • CMA IS NOT UNDER CONTRACT WITH SUBCONTRACTORS – OWNER BEARS RISK OF DELAYS
  • CMA NOT AT RISK OF PROJECT BEING OVER BUDGET – OWNER BEARS RISK OF OVERRUNS
STEP 1 – BUILD A WINNING TEAM

• ESSENTIAL TO START OUT ON THE RIGHT FOOT BY ASSEMBLING A TEAM THAT WILL STEER THE PROCESS FROM BEGINNING TO END

• INCLUDE:
  • ELECTED SCHOOL BOARD MEMBERS
    • FINAL DECISION MAKERS
    • UNDERSTAND THE POLITICAL PRESSURES
  • DISTRICT OPERATIONS & BUILDING MAINTENANCE STAFF
    • FIRSTHAND KNOWLEDGE OF WHAT NEEDS FIXED
    • WILL HAVE TO OPERATE ONCE COMPLETED
  • END USERS
    • PEOPLE WHO WILL WORK IN THE SPACE WHEN COMPLETED
STEP 2 – PUT THE TEAM TO WORK

• ONCE ASSEMBLED, THE TEAM SHOULD BE INVOLVED IN EVERY PHASE OF THE PROJECT
  • ENSURES CONSISTENCY
  • BUILDS STRONG ADVOCACY FOR FINAL PROJECT

• ENGAGE DESIGNERS AND CONTRACTORS EARLY
  • PROFESSIONAL EXPERIENCE UNLIKELY TO BE DUPLICATED BY REST OF TEAM
  • DON’T WAIT UNTIL THINGS ARE “FINALIZED” TO MITIGATE UNNECESSARY COSTS AND SCHEDULING ISSUES THAT MAY REQUIRE CHANGE ORDERS DOWN THE ROAD
STEP 3 – DESIGN A SCHEDULE

• START WITH THE DATE YOU WANT TO TARGET FOR FINAL COMPLETION AND WORK BACKWARDS ACCOUNTING FOR:
  • SCHOOL SCHEDULES
  • DESIGN
  • MATERIAL AVAILABILITY
  • BUILDING PERMITS
  • DESIGN REVIEWS
  • WEATHER

• MAY NEED TO RESET TARGET DATE ONCE ACCOUNTING FOR ALL FACTORS
STEP 4 – PREPARE A GREAT RFQ

SAMPLE CM ADVERTISEMENT

**REQUEST FOR QUALIFICATIONS (RFQ): CM SERVICES**

Insert Project Title

Return completed qualification to:

**XXXXXXXX School District Office**

**XXXXXXXXX**, ID 83

**TO BE CONSIDERED, QUALIFICATIONS MUST BE RECEIVED BY 3:00 PM on**

Contact **XXXXXXXXXXXX**, via email ([insert email]) to request RFQ documents.

SAMPLE CM RFQ

REQUEST FOR QUALIFICATIONS

CM Services—Insert Project Title

Return completed qualifications to:

**XXXXXXXX School District Office**

**XXXXXXXXX**, ID 83

**TO BE CONSIDERED, QUALIFICATIONS MUST BE RECEIVED BY 3:00 PM on**

Contact **XXXXXXXXXXXX**, via email ([insert email]) to request RFQ documents.
RFQ FACTORS

• Pay special attention to unique conditions in your project
  • Pre-existing problems
  • Scheduling
  • Requirements of other jurisdictions
    • City/County/Highway District
    • State/Federal funding requirements

• The more specific you can be at the start, the better the result
FACTORS OF A GREAT RFQ

• AVOID UNREALISTIC PARAMETERS
  • “WE WANT A CADILLAC ON A FORD BUDGET, AND WE WANT IT YESTERDAY”

• ELIMINATE REDUNDANCY
  • CAREFULLY REVIEW EACH QUESTION TO ENSURE THAT EACH IS ESSENTIAL AND UNIQUE

• FOCUS ON WHAT IS IMPORTANT
  • DON’T LET PROCESS GET IN THE WAY OF PROGRESS
  • KEEP THE END-GOAL IN MIND
STEP 5 – THE SELECTION PROCESS

• TYPICAL PROCESS INCLUDES SCORING OF THE WRITTEN RFQ RESPONSES AND AN IN-PERSON INTERVIEW WITH CONSTRUCTION TEAM

• SCORING MUST:
  • BE IN WRITING
  • USE A NUMERICAL SCALE
  • MADE PUBLIC AT END OF THE PROCESS

• SCORING SHOULD:
  • BE WEIGHTED – NOT ALL FACTORS ARE EQUALLY IMPORTANT
THE INTERVIEW

• INTERVIEWS ARE NOT REQUIRED BUT ARE HIGHLY RECOMMENDED
  • OPPORTUNITY TO EXPLORE THE EXPERTISE OF THOSE RESPONSIBLE FOR YOUR PROJECT
  • GREAT TEST OF THE CONNECTIVENESS AND RESPONSIVENESS OF THE CONTRACTOR
  • PANEL SHOULD BE SAME TEAM FROM STEP 1

• TIMING
  • ALLOCATE TIME FOR CONTRACTOR TO MAKE A PRESENTATION
    • WILL INCLUDE AN INTRODUCTION OF ALL KEY PERSONNEL
    • WILL COVER MATERIAL IN THE WRITTEN SUBMISSION
    • WILL COVER QUESTIONS YOU SEND IN ADVANCE OF THE INTERVIEW
  • ALLOCATE TIME FOR QUESTIONS FROM THE PANEL
QUESTIONS YOU MIGHT CONSIDER

• EXPLAIN YOUR PROPOSED APPROACH TO OUR UNIQUE PROJECT
• WHAT SCHEDULING CONCERNS HAVE YOU IDENTIFIED
• SHARE YOU PAST EXPERIENCE WITH PROJECTS SIMILAR TO OURS
• HOW HAVE YOU OVERCOME A DIFFICULT CHALLENGE ON A PAST PROJECT
• WHAT AREAS DO YOU PLAN ON SELF PERFORMING (APPLICABLE TO CM/GC ONLY)

• AVOID DISCUSSIONS ON BUDGETING AND PRICES
MAKING YOUR SELECTION

• RANK EACH TEAM ACCORDING TO YOUR PRE-ESTABLISHED CRITERIA

• ENTER INTO NEGOTIATIONS WITH HIGHEST RANKED TEAM
  • THIS IS WHERE YOU CAN ASK ABOUT BUDGETS AND FEES
    • CONSIDER ASKING FOR EXAMPLES OF BUDGETS AND FEES FROM PAST PROJECTS
    • WILL FOCUS ON FEES DURING BOTH PRE-CONSTRUCTION AND CONSTRUCTION
  • PRE-CONSTRUCTION:
    • CONTRACTOR SERVES AS A CONSULTANT HELPING GUIDE THE PROCESS
    • FEES USUALLY BASED ON TIME AND MATERIAL COSTS
    • MAY INCLUDE A CAP
MAKING YOUR SELECTION — CONTINUED

- CONSTRUCTION
  - MANAGEMENT FEE FOR CM
  - MATERIALS AND SUBCONTRACTOR PRICING WILL BE ADDRESSED AFTER DESIGN IS COMPLETED

- REMINDER:
  - YOU DO NOT HAVE TO HIRE THE HIGHEST RANKED TEAM IF YOU CANNOT AGREE TO A REASONABLE BUDGET OR FEE STRUCTURE
  - IF YOU AREN'T COMFORTABLE WITH THE TEAM’S PROPOSAL, YOU MOVE ON TO THE NEXT HIGHEST RANKED TEAM
  - IT'S IMPORTANT THAT YOU PROVIDE FEEDBACK TO THE NON-SELECTED TEAMS
OPTION 2 – LIST OF QUALIFIED CONTRACTORS

- RFQ PROCESS SIMILAR TO CM/GC
- PRIMARY DIFFERENCE IS SCOPE OF SERVICES TO BE PERFORMED

LEGAL REQUIREMENTS:
- LIST OF AT LEAST 2 FIRMS (NO CAP)
- LIST VALID UP TO 5 YEARS (CAN BE CANCELLED EARLIER)
- MUST PUBLISH A RFQ
- COMPLETE SELECTION PROCESS JUST LIKE HIRING FOR SINGLE PROJECT
- ONCE THE LIST IS ESTABLISHED, OWNER MAY HIRE FROM IT WITHOUT GIVING PUBLIC NOTICE
QUESTIONS
CONTACT INFORMATION

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