



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



Bryce Parker
Beniton Construction
Meridian, ID

Michael Arrington
Starr Corp
Twin Falls, 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

XXXXXXXX School District #XXX

REQUEST FOR QUALIFICATIONS (RFQ): CM SERVICES

Insert Project Title

XXXX DateXXXXXXXX

Pursuant to Idaho Code § 54-4501, **XXXXX** School District #**XXX** (the school district) will accept Statements Of Qualifications (SOQs) from licensed Idaho Public Works Construction Managers in good standing to perform construction manager services.

Pursuant to Idaho Code § 67-2320, the school district plans to use the Construction Manager delivery process in accordance with the Qualification Based Selection process. The school district is seeking SOQs from qualified firms to provide CM services to assist with this project. Written SOQs will be received at the **XXXXX** School Office, **XXXXXXXXXXXX** Drive, **XXXXXXX**, Idaho 83**XXX** until **DATE at 3:00pm**.

Any statement of qualifications received after such time will not be considered and will not be returned. Each SOQ will be evaluated on the basis of qualifications as specified in this RFQ. A selection committee will evaluate each of the SOQs and the committee may choose to conduct interviews with one or more of the firms.

The Board of Trustees of the **XXXXX** School District will make the final decision regarding the firm chosen for CM services for this project. The school district reserves the right to reject any and all SOQs, to waive any irregularities in the SOQs received, and to select the CM that is in the best interest of the school district and the public.

The issuance of the RFQ and the receipt and evaluation of sealed SOQs does not obligate the school district to award a contract. The school district will pay no costs incurred in responding to this RFQ, the school district may in its discretion cancel this process at any time prior to execution of a contract without liability.

Contact **XXXXXXXXXXXXXX**, via email (**insert_email**) to request RFQ documents.

Advertise Dates **XXXXXXX, XXXXXXX**

SAMPLE CM RFQ

REQUEST FOR QUALIFICATIONS

CM Services-Insert Project Title

Return Completed Qualifications To:

XXXXXXXX School District Office
XXXXXXXXXXXXXXXXXXXX
XXXXX, ID XXXXX

TO BE CONSIDERED, QUALIFICATIONS MUST BE RECEIVED BY X:00 PM on
XXXXXXXX

REQUEST FOR QUALIFICATIONS

-1-

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 YOUR 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

- **ANNA SPARRELL**

- **CM COMPANY, INC.**
- **WWW.CMCOMPANY.COM**
- **208-384-0800**

- **BRYCE PARKER**

- **BENITON CONSTRUCTION**
- **WWW.BENITON.COM**
- **208-884-0027**

- **MICHAEL ARRINGTON**

- **STARR CORP**
- **WWW.STARRCORPORATION.COM**
- **208-733-5695**