1.0 SUMMARY OF REQUEST

Valley of the Sun United Way (VSUW) is soliciting proposals for Architectural/Engineering (A/E) services for a tenant fit-out bid package for its new office location in Phoenix, Arizona. VSUW is planning to lease a 20,000-35,000 square foot building which will accommodate approximately 200 employees. The landlord will be responsible for the design and construction of the core and shell of the existing building. It will be the responsibility of the successful A/E firm to deliver a space plan for the top three lease options and a full set of construction documents to build out the interior spaces including all mechanical and electrical services for the selected building.

The scope of work for A/E services required is described in this document. The A/E firm selected for this project will report directly to the VSUW Project Manager assigned to this project, and assume full responsibility for facility interior design, which may require specialized consultants (IT, A/V, Food Service, etc.) to be an integral part of the A/E’s project organization. It is anticipated that a general contract method of project delivery will be used for the interior fit out phase of this project.

Your firm has been identified as a candidate with qualifications to provide the appropriate A/E services. The purpose of this document is to provide the detail of the A/E services required for this project and establish the basis for the contract agreement between VSUW and the A/E service provider. Although unforeseen circumstances may require departures from this directive; any deviations require prior written approval or direction from VSUW or the VSUW Project Manager.

1.0.1 VSUW Background

Valley of the Sun United Way’s mission is to improve lives by mobilizing the caring power of our community. The organization provides programs that serve people in need across Maricopa County. Most households served by United Way earn low incomes. The organization’s vision is to build a caring community where children and youth succeed, families are self-sufficient, and people enjoy maximum health and independence.

Since 1925, United Way has partnered with businesses, nonprofits, faith organizations, and state and local governments to develop, provide, and manage programs. United Way’s strength is in leveraging partnerships to address immediate and long-term challenges. United Way’s expert staff collaborates with partners, and initiates and leads innovative programs to ensure children and youth succeed, increase the financial stability for people earning low incomes, and end hunger and homelessness.

VSUW has annual revenue of $110 million, and an annual donor base of over 90,000 donors. VSUW employs approximately 120 employees, and adds another 30 loaned or hired staff from August-December each year.
1.0.2 Project Background -- Work United Initiative

VSUW launched its Work United strategic initiative with a vision of: Mobilizing our employees and transforming our workplace to support our strategic objectives and community initiatives. The key project objectives are to:

- Accommodate growth
- Increase and improve convening/collaboration spaces
- Convey VSUW’s story and brand
- Attract and retain talent
- Increase engagement and productivity
- Enable flexibility and mobility

The two major components of Work United are the Mobile Workforce and Real Estate Space.

Mobile Workforce

About 25% of VSUW’s workforce works remotely at least one day per week. The expansion of teleworking will continue over the next couple of years. It is estimated that within the next couple of years that about 80% of the workforce will work remotely at least one day per week. With staff working remotely, less space will be needed per employee, but different types of space will be needed, including:

- Meeting and convening space
- Hoteling desks, conference rooms
- Collaboration spaces
- Space for volunteer activities

Future Real Estate Space

VSUW anticipates leasing future space with approximately 25,000 to 35,000 square feet. The space will support a mobile and flexible workforce, and support VSUW’s community work with sufficient space for convening and collaboration. Some factors important in the design include:

- Operational efficiencies: Support for productivity and work processes, including space for collaboration, team meetings
- Workforce growth flexibility: Adequate space for workforce growth
- Financial flexibility: Mitigates financial risk over time
- Community perception: How space may be perceived by the community, how supports positive image of VSUW and tells VSUW’s story and brand
- Attractive workplace: Attractiveness of the workplace for staff and visitors
- Community work: Availability of convening, collaboration, and other space needed to support community
  - Easy access to location
  - Convenient
  - Central
  - Easy, sufficient parking
  - Collaborative spaces
  - Meeting spaces
1.1 PROJECT

1.1.1 Project Confidentiality

The A/E service provider will be required to: 1) Maintain strict confidentiality of all oral, written and otherwise documented information pertaining to this project; 2) Limit distribution of such information to only individuals necessary to prepare your proposal; 3) Return all materials provided by VSUW during the Request of Proposal (RFP) process to the VSUW Project Manager, within ten (10) calendar days of notification, if you are not awarded the contract; and 4) Include an acknowledgement that all copies made have been destroyed. If you are awarded the contract, do not distribute any project related information at any time, except as required to complete the project, without written permission or direction from VSUW.

1.1.2 General Space Program Requirements

To be determined.

1.1.3 Scope of Services

Architectural/Engineering

A. Preliminary Design
   a. Collect project criteria from VSUW and verify programming criteria.
   b. Review accessibility plan (ADA) and circulation requirements, egress distances path of travel, etc. for potential sites.
   c. Prepare a design schedule to meet VSUW’s milestone dates.
   d. Review Architectural space plans with specific user groups to obtain department approvals.
   e. Prepare conceptual designs and layouts.
   f. Present final preliminary design options for VSUW’s review.

B. Detailed Design Phase
   a. Based on the approved Preliminary Design and Design Development Phase documents, prepare Architectural, Structural, Mechanical and Electrical Construction drawings and specifications (project manual) for bidding and permitting.
   b. Include all necessary and required consultants’ (IT, A/V, Food Service, etc.) documents into one package for bidding and permitting. Coordinate all disciplines with each other in order to deliver a complete bid package.
   c. Coordinate furniture and equipment layouts with VSUW.
   d. Select, specify and provide bid packages for furniture, fixtures and equipment (FF&E) and interior signage.
   e. Prepare and present material finish boards (including new furniture finishes).
   f. Assist Project Manager with Request for Quotations (RFQ) and issue drawings and specifications for bidding purposes.
   g. Submit plans and specifications to local building authority for permitting and revise drawings to meet all governmental comments and revisions.
h. Respond to all governmental reviews and revise construction documents accordingly. If project is being bid during this period, issue required addendums to all bidders reflecting any Construction Document changes.

C. Bidding and Negotiation
   a. Assist with preparing and distribution of bid package(s), as required.
   b. Attend construction pre-bid meetings, bid clarification meetings (as necessary) and pre-award meetings.
   c. Assist with bid evaluations (if required) and verify that contractor bids reflect the required scope of work.

D. Construction Administration
   a. Provide construction administration services including, but not limited to Request for Information (RFI’s), bulletins, change orders, submittal and shop drawing review, punch lists, etc.
   b. Attend weekly project meetings and provide support for coordination and scheduling issues.
   c. Perform job site visits at regular intervals, but no less than twice a month, to evaluate adherence to project plans and specifications. Job site visits should be timed in accordance with the Contractor’s Application of Certificates for Payment which the A/E will review and approve.
   d. Assist in resolving field problems and disputes in the most economical and expeditious manner possible.
   e. Assist with obtaining Certificate of Occupancy from local building authority as necessary.
   f. Collect “As-Built” information from the General Contractor at the end of the project and update the construction drawings to reflect the as-built conditions and submit the updated drawings to VSUW upon completion of the project.

1.1.4 Changes in Engineering Scope or Criteria

During the design and/or construction phase, it may be necessary for VSUW to make modifications or additions to the project scope or criteria. In such cases, the VSUW Project Manager will request a Professional Services Change Notice (PSCN) from the appropriate party. In either case, do not proceed with the changes until receipt of a PSCN or purchase order alteration signed by an authorized VSUW representative. If verbal instructions are received from one of the members of the VSUW project team that would result in changes to the original scope or criteria and have an impact on the total costs or schedule of your contract, notify the VSUW Project Manager. Unless otherwise directed by VSUW, submit lump sum quotations for Professional Services Change Notice with details of architect and/or engineering hour’s unit prices, reimbursable, etc. to be provided. There may be times when the VSUW Project Manager will request that you prepare one or more of the following, to be included in a PSCN:

- Description of the change
- Estimated hours, by discipline, to accomplish the change
• Proposed duration for the completion of design revisions and notification of whether or not the modifications will result in additional duration to the established contractual delivery dates, if applicable
• Net change in fee to complete the change, broken down by drawing and specification revisions, document distribution, construction cost estimate preparation, and additional shop drawing reviews resulting from the change

**PSCN:** VSUW may issue a PSCN with the box checked “Request for quote not authorized to proceed.” This is requesting a quotation (only) when there is a change to the original Architect-Engineer contract documents and there is adequate time to submit a quotation before the related engineering and construction work is undertaken.

**PSCN:** VSUW may issue a PSCN with the box checked “Proceed with Change – Authorized by VSUW Project Manager,” authorizing work to begin immediately. This is used when there are urgent on-site conditions or situations that would seriously delay the construction schedule or interfere with on-going production operations. In some cases the responsible engineer may be asked to prepare a construction field order, including drawings or sketches when appropriate, and submit it to the VSUW Project Manager for obtaining necessary approvals.

### 1.1.4.1 Changes Initiated by the Architect-Engineer

VSUW encourages you to submit recommendations for procedures or design changes that will reduce project cost, improve functionality of the completed facility, and/or shorten the project schedule. However, any such changes are subject to approval by VSUW and must meet the same functional and technical requirements that are included in this RFP. Identify and submit recommended changes separately from other project correspondence and documentation. Provide all information and materials necessary to satisfy the VSUW project team that recommended changes do not adversely affect cost, functionality, or schedule.

Changes due to errors or omissions are not considered a change in scope. The cost of re-design and/or engineering such changes is the responsibility of the Architect-Engineer.

### 1.1.5 Kick-Off Meeting

The VSUW Project Manager will schedule a kick-off meeting at the Architect-Engineer’s office. It is mandatory that your project organization chart be established by the day of this meeting and that your Project Manager and all assigned engineering discipline leaders be in attendance. The Architect-Engineer shall require that all the people that will be attending the kick-off meeting read the entire document and formulate questions regarding the parts of it that they will be responsible for and do not fully understand. The Architect-Engineer’s Project Manager shall be responsible for producing the minutes of the meeting.

At this kick-off meeting the following items will be completed/reviewed:

- Review of project scope.
- Review of, and the identification of, specific people from each organization for the items, services, tasks, etc. indicated including roles and responsibilities.
• A preliminary schedule, by engineering discipline, indicating functional review meeting dates, coordination meeting dates, completion of engineering dates, issue of bid dates, award of contract dates, and construction duration periods for each bid package.

1.2 SCHEDULE

1.2.1 Project Summary Schedule

Anticipated milestone dates that are critical to the delivery of this project are as follows:

• Completion of construction documents – November 30, 2013
• Other milestone dates will be discussed at kick-off meeting

2.0 PROPOSAL REQUIREMENTS

Please address all of the items noted in this section in your proposal. Failure to do so may result in your proposal not being considered. Proposals will be evaluated based on demonstration of meeting the requirements of this RFP.

2.1 QUALIFICATIONS

2.1.1 Organization

Please submit general statements about your organization’s qualifications and other information deemed necessary. Include at least the following:

• Firm name, business address, telephone, email address, website address and fax numbers
• Contact person(s) with title(s)
• Professional history and affiliations
• Current staff size and professional registrations
• Range of professional service capabilities
• Impact of current workload on ability to meet the requirements of this RFP
• Previous experience with VSUW

2.1.2 Relevant Project Experience

Provide descriptions of at least three projects that have been executed within the past five years. The projects described shall be similar in scope and complexity to the project described within this RFP. Please include at least the following:

• Project size (square feet)
• Construction value
• Basic project program
• Project delivery approach
• Project owner with current address and telephone number
• Principal Tenant Organization contact with current address and telephone number

2.1.3 Personnel

Please submit resumes for personnel proposed on the bid form. State their proposed project responsibilities. Include the following:

• Project Manager
• Licensed Architects and Engineers who will be professionals of record
• Discipline leaders (architectural, civil, structural, mechanical, electrical, etc.)
• Project Managers, licensed engineers, and designers of consulting firms
• Field representative(s)
• Other specialists

2.2 BASIS OF FEE

2.2.1 Lump Sum Fee

Provide a “lump sum” fee for services in your proposal. Include charges for overhead, profit, taxes, printing, distribution, and other such incidental items required to complete this project as described herein and in any subsequent pre-bid meeting minutes, letters of clarification, and addenda.

Additional services resulting from a change in project scope will be handled as described herein, “Changes in Engineering Scope or Criteria.”

2.2.2 Fee Breakdown

Please provide a breakdown of your fee by phase outlined below:

1. Preliminary Design Phase
2. Detailed Design
3. Bidding and Award
4. Construction Administration

Please submit an Hourly Rate Schedule that will be utilized for changes in the scope of services approved by VSUW. Include the following:

• Hourly straight time base salary rates for all classifications in your organization
• The effective period of the Hourly Rate Schedule

2.2.3 Reimbursable Schedule

Submit a Reimbursable Schedule that will be utilized for the scope of services per the RFP and approved by VSUW. A handling or markup fee will not be allowed except for consultant services directed and approved by the VSUW Project Manager. Itemize items that have created reimbursable costs for changes in past professional services contracts. Include at least the following:
• Printing, copying, and distributing deliverables
If actual expenses exceed the reimbursable line item, the A/E must request that a PSCN be written by VSUW.

2.2.4 Exceptions and Alternatives

Please base your proposal on complying with all of the requirements of this RFP and any subsequent pre-bid meeting minutes, letters of clarification, and addenda, including requirements incorporated by reference within this document.

Alternative methods or schedules for project approach which would meet or exceed project requirements while improving project value may be submitted for evaluation by VSUW.

2.2.5 Proposal Submittal

If interested, please provide a detailed response via e-mail and/or postal mail to Renee Farnell at rfarnell@vsuw.org no later than Friday, September 6, 2013. Upon receipt of written proposals, the finalists will be invited to make a presentation before VSUW leadership at a date to be determined.

Please submit your proposal with all of the requirements of this RFP to the following email and/or postal address:

Renee Farnell
Project Director
Finance & Administration
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