

SPECIFICATIONS & SCOPE OF SERVICES

PROJECT BACKGROUND

White Settlement Independent School District ("WSISD" or "District") is soliciting proposals from qualified Construction Manager At-Risk (CMAR) firms for HVAC improvements throughout District facilities.

The District has retained Reed, Wells, Benson and Company (RWB) as the Mechanical, Electrical, and Plumbing (MEP) Engineer of Record for the project. RWB will be responsible for engineering design, preparation of construction documents, and construction administration services associated with the project.

The CMAR shall provide preconstruction services during design development and construction document preparation and shall subsequently serve as the Constructor under a Guaranteed Maximum Price (GMP) contract for the construction phase.

The District intends to procure the CMAR using a One-Step Selection Process in accordance with applicable provisions of the Texas Government Code governing Construction Manager At-Risk procurement. This project will be subject to AIA contracts.

PROJECT OBJECTIVES

The primary objectives of this project include:

- Replacement and/or modernization of aging HVAC equipment
- Improvement of indoor air quality and occupant comfort
- Enhancement of system reliability and maintainability
- Improvement of energy efficiency and operational performance
- Minimization of disruption to instructional activities
- Completion of construction within established budget and schedule constraints

The final scope of HVAC improvements will be defined through the design process and may include, but is not limited to:

- Rooftop units
- Air handling units
- Chillers and boilers
- Geothermal systems
- Variable frequency drive installations
- Building automation and controls upgrades
- Ductwork modifications
- Electrical infrastructure modifications required to support HVAC improvements
- Testing, adjusting, and balancing (TAB)
- Commissioning support
- Related architectural and structural modifications necessary for installation of HVAC systems

PRECONSTRUCTION SERVICES

The selected CMAR shall provide comprehensive preconstruction services including, but not limited to:

Design Phase Collaboration:

- Attend regular design meetings with District representatives and RWB
- Review design documents at schematic, design development, and construction document milestones
- Provide constructability, coordination, and quality reviews
- Identify potential conflicts, coordination issues, and schedule impacts
- Recommend value engineering alternatives while maintaining project performance requirements
- Evaluate material availability, escalation risks, and procurement challenges
- Review phasing requirements to minimize disruption to District operations

Cost Estimating and Budget Management:

- Prepare and update detailed construction cost estimates throughout the design process
- Develop quantity takeoffs and CSI-format or equivalent cost estimates
- Identify scope, pricing, escalation, contingency, allowance, and procurement considerations
- Reconcile estimates with those prepared by the Engineer
- Recommend scope modifications necessary to maintain budget objectives
- Maintain an open-book cost management process throughout design
- Provide detailed cost backup documentation supporting all budget updates

Scheduling and Phasing:

- Develop and maintain a master project schedule
- Identify critical path activities
- Develop procurement schedules and long-lead equipment schedules
- Provide recommendations for phased construction
- Develop occupied-campus construction plans and summer construction schedules
- Coordinate utility outage requirements and shutdown planning
- Prepare and periodically update project cash-flow projections

Site Logistics and Campus Coordination:

- Develop site logistics plans addressing access, egress, parking, material staging, temporary facilities, security, and emergency access
- Coordinate construction activities with District operations
- Develop plans to maintain student, staff, and visitor safety throughout construction

Subcontractor Procurement Planning:

- Develop trade package scopes of work
- Prepare bid package strategies and procurement schedules
- Assist the District and Engineer in identifying procurement risks and opportunities

Guaranteed Maximum Price Development:

- Collaborate with the District and Engineer in development of the GMP

- Provide detailed GMP backup documentation
- Identify assumptions, contingencies, allowances, exclusions, escalation factors, and procurement risks
- Provide CSI-format or equivalent cost breakdowns
- Participate in GMP review and negotiation meetings
- Provide complete documentation supporting the basis of the GMP

CONSTRUCTION PHASE SERVICES

Following acceptance of the GMP, the CMAR shall serve as Constructor and shall provide the following services:

Project Management:

- Furnish all labor, supervision, equipment, temporary facilities, and management services necessary for project completion
- Maintain complete project records
- Conduct coordination meetings
- Manage subcontractors and suppliers
- Provide project accounting and cost management
- Maintain complete open-book cost records, subcontractor bid tabulations, contingency logs, allowances, general conditions costs, and supporting documentation.
 - Such records shall be available to the District for review upon request.
- Provide monthly project reports

Submittal, Shop Drawing, and RFI Management:

- Maintain submittal logs and tracking systems
- Coordinate review and processing of submittals and shop drawings
- Maintain RFI logs and coordinate timely responses
- Track and report outstanding design and coordination issues

Safety and Security:

- Develop and implement a comprehensive site-specific safety program
- Ensure compliance with OSHA and all federal, state, and local requirements
- Coordinate safety procedures with District operations
- Enforce contractor and subcontractor compliance with Senate Bill 9 requirements
- Maintain campus access controls and visitor management procedures
- Coordinate delivery routes and construction access
- Conduct regular safety meetings and inspections

Quality Management Program:

- Implement a comprehensive Quality Management Program
- Coordinate inspections and testing
- Track deficiencies and corrective actions
- Verify compliance with plans and specifications
- Coordinate commissioning and quality verification activities

- Maintain quality documentation and reporting

Schedule Management:

- Maintain and update the project schedule
- Coordinate work to minimize disruption to District operations
- Coordinate activities during school sessions, holidays, evenings, weekends, and summer breaks
- Monitor procurement activities and long-lead equipment delivery
- Coordinate HVAC startup, TAB, and commissioning milestones
- Provide monthly schedule updates reflecting actual progress, procurement status, critical path impacts, recovery plans, and projected completion dates.

Change Order Management:

- Maintain a formal change order management process
- Track potential change events
- Review pricing and schedule impacts
- Negotiate subcontractor change orders
- Maintain a change order log
- Provide recommendations to the District

Monthly Reporting:

- Project schedule status
- Budget and cost status
- Change order status
- Procurement status
- Safety summary
- Progress photographs
- Upcoming activities
- Risks and mitigation measures
- Issues requiring District action

HVAC-SPECIFIC CONSTRUCTION SERVICES

The CMAR shall:

- Coordinate HVAC equipment procurement and delivery
- Coordinate startup and functional performance testing
- Coordinate TAB activities and documentation
- Participate in commissioning activities
- Coordinate BAS integration and controls installation
- Coordinate utility outages and system transitions
- Coordinate activities with the District's Commissioning Authority (CxA), including deficiency resolution, functional performance testing, documentation, and project closeout requirements

SUBCONTRACTOR PROCUREMENT

The CMAR shall procure subcontractors in accordance with applicable Texas law governing Construction Manager-at-Risk delivery.

The CMAR shall:

- Publicly advertise and solicit bids or proposals for major trade packages
- Prepare trade-specific bid packages and scopes of work
- Conduct pre-bid conferences and site visits
- Receive, tabulate, and evaluate bids and proposals
- Review bidder qualifications, experience, and financial capability
- Recommend subcontractor awards to the District
- Maintain procurement documentation and bid records

The District, CMAR, and Engineer shall jointly review subcontractor proposals and participate in trade contractor selection in accordance with statutory requirements.

The CMAR may self-perform portions of the Work only in accordance with applicable Texas law and only when approved by the District.

GUARANTEED MAXIMUM PRICE

The CMAR shall submit a Guaranteed Maximum Price (GMP) proposal at a point mutually agreed upon by the District, Engineer, and CMAR.

The GMP proposal shall include:

- Detailed cost breakdown by trade
- Quantity takeoffs
- General conditions
- CMAR fee
- Contingencies
- Allowances
- Bonds and insurance
- Assumptions and exclusions
- Escalation considerations
- Procurement considerations
- Construction schedule
- Cash-flow projections
- Supporting backup documentation
- Performance and Payment Bonds as required by Texas law and District contract documents

If the District and selected CMAR are unable to successfully negotiate a GMP agreement, the District reserves the right to terminate negotiations and proceed in accordance with applicable law.

PROJECT CLOSEOUT

The CMAR shall provide comprehensive closeout services including:

- As-built documentation in digital format
- TAB reports
- Commissioning documentation
- Equipment startup records
- Operation and Maintenance Manuals
- Training for District maintenance personnel
- Warranty documentation and tracking information
- Final lien releases
- Final project accounting and cost reconciliation
- Final inspection coordination
- Warranty-period walkthrough and support
- Coordinate warranty service activities and assist the District in enforcing warranty obligations during the warranty period.

RECORD DOCUMENTS

The CMAR shall provide:

- Electronic project record documents in PDF format
- Electronic as-built drawings
- Equipment startup records
- Warranty logs
- O&M manuals
- Commissioning documentation
- TAB documentation
- Final project closeout checklist

COORDINATION REQUIREMENTS

The CMAR shall work collaboratively with:

- White Settlement Independent School District
- Reed, Wells, Benson and Company
- District consultants
- Utility providers
- Regulatory authorities having jurisdiction

The CMAR shall support an open-book project management approach and maintain transparent communication throughout the project.

The CMAR shall coordinate utility outages, commissioning activities, controls integration, occupancy requirements, and project phasing to ensure successful completion of the HVAC Improvements Project while minimizing disruption to District operations.