SPIRIT
Automated eProcurement System

ADOA
Arizona Department of Administration

Professional Services Annual Request for Qualifications (A.R.S. § 41-2578)

REQUEST FOR QUALIFICATONS NO. EPS090085

ATTACHMENT 1

PROFESSIONAL SERVICES PROVIDER DATA SHEET

>>>THIS REQUEST FOR QUALIFICATIONS (RFQ) IS NOT A SOLICITATION<<<

Date: May 27, 2009

Firm Name: Gilbane Building Company

Address: 2111 E. Highland Avenue, Suite 350

City: Phoenix **State:** Arizona **Zip:** 85016

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*** * * * * PLACE A "☑" BESIDE THE BLANKS TO INDICATE AREAS OF EXPERTISE * * * * * ***

PROJECT COST RANGE CAPABILITIES

	NEW CONSTRUCTION	REMODEL/ RENOVATE
50K – 100K	☐	☐
100K – 400K	☑	☑
400K – 1M	☑	☑

DISCIPLINES	IN-HOUSE	CONSULT.
☐ Architectural	☐	☐
☐ Mechanical	☐	☐
☐ Electrical	☐	☐
☐ Civil	☐	☐
☐ Structural	☐	☐
☐ Landscape	☐	☐
☐ Acoustical	☐	☐
☐ Interiors	☐	☐
☐ Surveying	☐	☐
☑ Const. Mgt.	☑	☐
☑ Proj. Estimating	☑	☐
☑ Proj. Scheduling	☑	☐

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PREFERRED REGION

- ☐ Phoenix Metro Area
- ☐ Tucson and surrounding areas
- ☐ Flagstaff and surrounding areas
- ☐ Yuma and surrounding areas
- ☑ Statewide

☑ Constructability Rev.	☑	☐
☑ Value Engineering	☑	☐
☐ Specifications	☐	☐
☑ Const. Admin.	☑	☐
☐ JOC Design Services	☐	☐
☑ Preconstruction Services	☑	☐
☐ A/V Services	☐	☐
☐ Materials Testing	☐	☐
☐ JOC Estimating Services	☐	☐
☐ Geotechincal & Materials Testing	☐	☐

DISCIPLINES	IN-HOUSE	CONSULT.
☐ Underground utility locators.	☐	☐
☐ Vibration Study	☐	☐
☐ Archeological services	☐	☐
☐ Commissioning Agent	☐	☐
☐ Geologist	☐	☐
☐ Environmental Impact studies and Environmental Assessments.	☐	☐
☐ Energy Management Consultants	☐	☐
☐ Leeds LEED Independent 3rd Party Building Commissioning Engineers	☐	☐

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EXPERIENCE EMPHASIS:

- ☑ Fine Arts
- ☑ Auditorium/Theatre
- ☑ Labs
- ☑ Research Labs
  - ☑ Wet ☑ Dry
- ☑ Office Facilities
- ☑ Libraries
- ☑ Museums
- ☑ Outdoor Recreation
- ☐ Maintenance
- ☐ Materials Testing
- ☑ Transition Planning/ Move Management
- ☑ Design Document Reviews
- ☐ IT/Data Center Design
- ☑ Arena/Sports Facilities
- ☑ Med. Patient Care
- ☑ Medical Related
- ☑ Educational Structures
- ☑ Food Service
- ☑ Central Plant
- ☐ Swimming Pools
- ☑ Activity Centers
- ☐ Surveying
- ☑ Interdisciplinary Document Coordination
- ☐ _____

OTHER SERVICE SPECIALTIES:

- ☐ Area Master Planning
- ☐ Traffic Studies
- ☐ Historic Renovation/Preservation
- ☐ Infrastructure
- ☐ Surveying
- ☐ Geotechnical
- ☐ Construction Materials Testing
- ☐ Design & Planning Structured Parking Facilities
- ☐ Environmental Engineering
- ☐ Fire Protection
- ☐ Environmental Graphics & signage
- ☑ Existing Building Retro-Commissioning and Optimization
- ☑ Energy / Water Auditing savings
- ☑ Measurement /Verification /Conservation Water Consumption savings
- ☐ Roof Infrared imaging to Identify Water Leaks
- ☐ Controls and Electronics Engineer
- ☐ Forensic Investigation
- ☐ Bridge Design
- ☐ Facilities Programming
- ☐ Signage/Graphics
- ☐ Roofing consultant Services
- ☐ Right of Way
- ☐ Feasibility Studies
- ☐ Investigation/Reports
- ☑ Project Cost Estimating
- ☐ Programming
- ☐ Disability/Special Needs
- ☐ Lighting
- ☐ Solar Energy
- ☐ LEED Accredited A/E
- ☐ Phase I Environmental
- ☐ Title Insurance/reports
- ☑ Measurement & Verification of Energy Consumption savings
- ☐ Mold investigation
- ☐ Water and Waste Water treatment facility
- ☐ Security Systems
- ☐ Detention Security Systems
- ☐ Highway Design

CONSTRUCTION MANAGEMENT SERVICES

Planning

- Establishment of objectives
- Project conceptualization
- Feasibility studies
- Analysis of financing options
- Real estate site selection
- Capital budgeting
- Master Schedule
- Selection of design consultants
- Analysis of construction delivery system options

Preconstruction

- Partnering and team building
- Design and construction phase planning
- “Card Trick” schedule planning process
- Design reviews
- Conceptual and detailed cost estimates
- Building Information Modeling (BIM)
- Interdisciplinary Document Coordination (IDC)
- Value engineering
- Constructability reviews
- Value engineering
- Developing a well-defined GMP
- Detailed Scheduling
- Document control system
- Subcontracting strategies and procurement process
- SBE/MBE/WBE program development
- Site logistics planning
- Safety planning

Construction

- Full-time on site construction supervision
- Project specific safety program
- Quality in Construction (QIC) programs
- Public relations/community outreach programs
- Cost control
- Schedule control

- Site logistics coordination
- Occupancy planning
- Commissioning, start-up and acceptance of facilities
- As-built documents
- Project closeout

Post-Construction

- Transition planning/move management (TPM)
- Warranty administration
- Owner FF&E installation and coordination
- Relocation management
- i.management
- electronic turnover package eTOP^{sm}

PRECONSTRUCTION SERVICES

Planning

The foundation of any preconstruction management effort begins by properly understanding the Client's goals and objectives. At Gilbane, our project management philosophy is to first build a cohesive and collaborative team. By integrating the Client and the Design Professional into Preconstruction planning, Gilbane's team of construction professionals will suggest, implement, and then execute various design phase strategies such that the project's desired program is achieved within available budgets to a mutually agreed upon schedule.

Gilbane has various tools available to assess our Client's expectations very early in the process, including but not limited to:

- Analysis of Construction Delivery System Options
- Project Conceptualization
- Feasibility Studies
- Analysis of Financing Options
- Real Estate Site Selection
- Capital Budgeting
- Master Scheduling
- Selection of Design Consultants

Cost Advisor

As the project scope, function, delivery, and initial design parameters are developed through some or all of the above tasks, Gilbane differentiates its preconstruction planning services by utilizing its conceptual cost modeling tool the Universal Cost Advisor™. Proprietary to Gilbane, the Cost Advisor™ cooperatively brings the team together to make real-time programmatic choices…building size and geometry, space usage designations, interior and exterior finishes, equipment costs, etc…and utilizes historical, sector-specific cost data from projects around the country. In doing so, the process culminates in the production of a successful project concept based on realistic and reliable cost data.

Cost Estimating

As the design develops, Gilbane estimating services can be applied during different design iterations, including:

- Conceptual Estimates
- Schematic Estimates
- Design Development Estimates
- Cost Tracking
- GMP Estimates
- Bid Package Estimates

By using interactive estimating tools, such as On-Screen Takeoff (for quantity analysis), Roc-Tec (for Site analysis), and Timberline (estimate database), and EOS (historical cost data) cost information can be readily compiled and summarized in a mutually agreed format for use and consideration. Our relevant experience and proven cost estimating system, coupled with our Estimating Department's knowledge and working relationship with the subcontractors enables Gilbane to prepare detailed and accurate cost estimates.

Gilbane's in-house estimating capabilities include all 16 CSI divisions of work, including mechanical and electrical systems. We have a proven historical cost database, developed from actual costs of numerous sector specific projects. This database is validated against local information from subcontractors, suppliers and vendors, thereby ensuring the early development of accurate conceptual construction costs. Gilbane will provide detailed estimates at the completion of each design phase. This allows for on-going real-time project cost information so that there are not any budget surprises at the milestone estimates.

Value Engineering

In the simplest of terms, value engineering is the systematic analysis of design and construction alternatives to provide the Owner with best value for each construction dollar spent. The Gilbane team works diligently with the Owner, design and building team to find the optimal balance between cost, quality, performance and aesthetics. The team also takes into consideration operations and maintenance, energy consumption, flexibility and durability to identify the best overall value for the project.

Value engineering is part of an ongoing process throughout the preconstruction phase of a project. We have found that conducting formal value engineering sessions during both the schematic and design development phases provides great potential value to the Owner. With critical early input from select subcontractors, these sessions evaluate the various building systems, materials and the construction methods to be used and identify opportunities to save money, reduce schedule or increase performance by considering alternative solutions. We will then target high and low areas of cost through cost modeling and provide an in-depth evaluation during this process. This also allows for the most efficient solutions to be considered by the entire project team and then recommended to the Owner for approval.

Gilbane will review the design concepts and details for their cost implications, completeness, accuracy and practical results prior to their implementation. Additionally, Gilbane will bring attention to specific items that may lead to an

increase in project costs of possibly lengthen the construction schedule. Gilbane's value engineering efforts typically save 2-8% on most projects without compromising the functional or aesthetic properties. Those savings may then be used to maintain the budget or be re-invested back into the project.

Gilbane's vast experience and Lessons Learned database on similar projects will be of great value in the value engineering effort. During the design stages and throughout the project, Gilbane's approach to VE emphasizes long-term costs rather than the initial purchase pricing, as well as impacts to the phasing plan and construction schedule.

As part of the VE process, we analyze cost and schedule impacts of alternative:

- Structural systems
- Mechanical and electrical systems
- Lighting
- Technology and control systems
- Interior finishes
- Enclosure systems (skin and roof)
- Conveyance systems
- Interior partition systems
- Fast-track options
- Phasing plans
- Construction methods

Gilbane does not approach value engineering as scope reduction or design elimination. Instead, as builders, we bring expertise in management and provide recommendations for building the project better and with as few surprises as possible. Gilbane believes that a CPM's greatest duty is to deliver the facility that the Owner has envisioned, while protecting the budget and schedule as if it were our own investment. In order to support this, every possible threat to the budget and schedule is addressed and mitigated through the collaborative but disciplined efforts of the entire project team.

Budget Management

Gilbane takes ownership of the project budget beginning with the use of our Cost Advisor to create the initial cost model. We work with the project team to manage the project scope within the cost model and the established budget. As the design process proceeds, we explore bringing on board key design assist subcontractors (if needed) that are critical to the project's success, drawing upon their specific trade expertise as we refine the project design and cost while maximizing the project scope. We proactively manage the project costs during the design phase through our on-going Cost Tracking, design reviews, on-going value engineering, constructability review and major milestone estimates leading up to an acceptable GMP. By using our BIM model and implementing our Interdisciplinary Document Coordination (IDC) process we work closely with the design team to eliminate coordination issues in the construction documents, while reducing the number of potential Requests for Information (RFI's) and resulting change orders. During the

construction phase Gilbane proactively manages the Change Management process with the subcontractors to ensure any change condition is warranted and fairly priced. We take ownership of Construction Budget from the Cost Model through the GMP on through the final payment.

Scheduling

Our experience has shown the schedule is perhaps the most important project control mechanism to ensure project success. Throughout the life of the project, Gilbane utilizes Primavera P6 software to manage the design activities using CPM scheduling methods to control and track the project. Some of the other key scheduling activities and tools we employ are:

- Jointly develop and take ownership of the design schedule by Design Team, the Client, and Gilbane's Preconstruction staff
- Include key sub consultant input into the development and update of our schedules
- Include key external tasks, including funding analysis, permitting, municipal approvals, and program validation via Interactive Weekly Schedule Update

Gilbane employs a unique approach to scheduling and strategic planning to develop an overall master project schedule that clearly identifies critical design and construction dates and activities, as well as interrelated elements of the project into a logical sequence. Gilbane's unique "Card Trick" planning and scheduling session is an early scheduling meeting to establish, prioritize and integrate 200-500 key activities into a schedule of clearly defined tasks with assigned responsibilities. This proven process helps assure team coordination and commitment of all parties involved to milestones critical to maintain completion dates. One of the biggest advantages of the Card Trick is that it allows participants the opportunity to evaluate how the individual pieces of the project come together. In the process of developing the project schedule, the individual team members begin to build the working relationship of a solid project team.

Further, beyond conventional duration and milestone planning, Gilbane's experienced Schedulers can utilize the data for other purposes, including:

- Cost-Loaded schedules for cash flow analysis
- Formal risk assessment of critical path and related milestone activity
- Site Labor Loading Analysis for safety management

Interdisciplinary Document Coordination

As the only construction manager with a national internal document review department, Interdisciplinary Document Coordination (IDC) is designed to identify and communicate coordination issues within and between various construction disciplines and documents. Performed late in design phase just prior to procurement and construction, IDC seeks to minimize the construction phase requests for information (RFI's) and change orders detrimental to a project's program, schedule, and budget.

IDC is comprised of discipline-specific Document Review Coordinators. These professionals, Architects and Engineers with several years construction

field and contract administration experience, are trained to analyze your contract documents from the contractor's perspective. By using a defined review process and implementing multiple forms of electronic and hardcopy document analysis, a customized strategy will be developed for your project in order to execute a full review of all disciplines regardless of schedule, phasing, or project complexity. As an integral design phase service, IDC compliments Gilbane's Estimating, Purchasing, Scheduling, and Operational efforts, building relationships with the Client, Design, and Project teams through its Collaborative Review Application. In this electronic plans review environment, all team members can work virtually to exchange information in near real-time, prioritizing analysis regardless of changes caused by programmatic alterations and impacts thru hyper-track scheduling.

The Base Review involves execution of over 500 distinct review tasks by a team of disciplinary-specific Document Review Coordinators. The observations are communicated on a weekly (or if required, more frequently) basis to the Project, Design, and Owner teams via electronic reports. The sorting features within the document are designed to facilitate resolution of the items in a team approach. Document markups are made available to all parties at review conclusion. After issues have been addressed and revisions submitted, the Compliance Check is performed to verify issue resolution status. Outstanding items are discussed and forwarded to the Project Team, where alternative resolution strategies are developed.

Historically, the process reduces construction phase RFI's by 60%. Also, IDC has returned a ten-to-one savings in avoided cost of change orders versus review expenditures, as well as contributing to better use of time and resources for Clients and Architects. As the only Construction Manager with a dedicated in-house document review department, Gilbane's IDC services is another innovative enhancement to its core Design and Construction Phase services.

Constructability Reviews

As the Gilbane team monitors the development of the design and prepares an estimate, they will also review the documents from a "builder's perspective". Our team will examine the constructability of the design throughout each stage of development and make alternate suggestions for consideration that saves time, reduces cost and/or facilitates a smoother construction process. The reviews typically proceed at:

- Early concept
- Schematic design
- Design development
- Early construction documents

This feedback is provided to the design professional such that 'build-ability' points of view may be taken into account early on, minimizing the need for re-design.

Transition Planning and Move Management

State of Arizona
Polly Rosenbaum State Archives

Our Transition Planning and Move Management (TPM) expertise lies in developing transition plans that limit or eliminate downtime, as well as the validation and evaluation of all the costs associated with your transition. We develop a budget to help you manage those costs. Specializing in complex, multi-phased and high-risk projects, the Gilbane TPM team pulls all the essential elements of the transition/relocation process into a logical, achievable plan that minimizes impact to on-going operations; we spend the time necessary to understand organizational structure, operational methods and project goals. By planning early enough during preconstruction, we can identify and resolve unique occupancy issues. We will assist

you in making timely decisions that help avoid costly mistakes later in the project. While managing your transition, the Gilbane TPM team will save you significant time, money and operational disruption. Our industry experience and "lessons learned" provide measurable savings. The project is not complete until the occupants are moved in and the facilities are operational to try cases.

GILBANE TRANSITION PLANNING & MANAGEMENT SERVICE LISTING:

- Strategic Transition Planning
- Project Team & Operational Points of Contact Interviews
- "Card Trick" Scheduling Session
- Transition/Activation Plan & Budget Development
- Participation in design meetings with end users to identify potential "pitfalls" and advise on potential solutions
- Operational Transition
- Facilitate Committee/Working Groups to develop new Concept of Operations
- Development of Courtroom Move Guidelines & Training Program
- Development of Departmental Move Guidelines & Training Program
- Records/Document Planning
- Customized Staff Orientation/Communications Program
- Facilitate "Day in the Life" Exercises
- Facilitate "Mock Move" for Users and staff
- Facility Activation
- Detailed "hour by hour" Occupancy Plan Development
- Furniture, Fixtures and Equipment
- Planning, Procurement & Coordination
- Move Vendor Procurement Process Management
- Vendor Tracking (procurement, manufacturing, delivery and installation)
- On-site Transition Vendor Management
- Minor Modifications service for critical last minute MEP challenges
- Excess/Surplus and Facility Close-out Services

CASE STUDY - TRANSITION PLANNING / MOVE MANAGEMENT FOR THE POLLY ROSENBAUM STATE ARCHIVES BUILDING

For more than three decades, the Arizona State Library, Archives and Public Records was in need of a new storage facility in order to preserve the State Archives, the Capitol Museum collections and provide storage for the State's historical artifacts and archival collections. In March, 2006, the Arizona Legislative Council selected Gilbane Building Company to serve as Project Manager to determine a budget so the Legislature could fund the project. At the time, the only approved appropriation was for design services, rendered by DWL Architects + Planners. Once the budget was established and the funding was approved, Gilbane, as the Owner's Representative, led the Arizona Legislative Council through the selection process for the Construction Manager at Risk. Mortensen was selected as the CMAR and Gilbane continued as the Owner's Representative through the life of construction and close-out.

The 140,000 square foot facility includes areas of special climate control that require protection from environmental and mechanical hazards in order to provide long-term preservation and protection of fragile materials. Functional spaces include:

- Triage: temporary storage space for incoming materials. The space is a tightly isolated holding room that prevents spread of contamination from insects, mold, etc.
- Holding Room: Materials that are deemed free of contamination are moved into the holding room to determine additional preservation needs as well as final storage location.
- Treatment Area: This space utilizes negative air pressure in order to ensure materials are unable to infect each other. After they are treated in the first space, they are moved to a workroom where they are cleaned before moving to the holding room. Finally, materials which require re-humidification, i.e. rolled documents, are placed in a humidifying room, located in the treatment area.
- Processing Rooms: Archives and Capitol Museum room for processing, indexing, arranging records.
- Conservation Laboratory: Laboratory for professional conservation of the collections. This particular space includes a darkroom and area for cleaning papers and artifacts.
- Archives Collections: area for long-term storage of all of the State Archives.
- Pre-Archival Records: area for long-term storage of pre-archival records from a variety of state agencies.
- Secure Reading Room: Room in which the public is able to access the collections through an archivist, while under supervision to ensure preservation of the items.

Mortensen commenced construction in November 2006. Construction was completed in October 2008. A dedication ceremony is scheduled for January 15, 2009.

Gilbane Transition Planning Management (TPM) began working in March 2007 with the Arizona State Library, Museum, Archives and Public Records staff to plan the consolidation and move from the Arizona State Capitol and three warehouse spaces to the new facility located at the Southwest corner of 19th Avenue and Madison Street. Implementation of the master transition schedule proceeded over the following 18 months to ensure everything was ready to support and monitor the move activities which began in October 2008. This was not just "a move". It was the strategic coordination to install 15.43 miles of new and relocated moveable shelving into 2.2 miles of new rails. It also required strong attention to conservation and keen planning for a safe and secure move for rare and irreplaceable state treasures like the original "Guest Register" for the infamous Yuma prison, museum collections including ancient Native American pottery and artifacts, and public records like the court records for the Miranda case. The move also included antiques such as the original Capitol furniture and outgoing Governors' desks as well as artwork and a large collection of maps.

order to ensure all items were properly moved, handled and cared for, the Arizona Legislative Council approved the Transition Planning and Move Management services including but not limited to:

- Creation and Adherence of the Transition Master Schedule
- Creation and Adherence of the Transition Project Budget
- Facilitation of Project Meetings
- Specialty Equipment Inventory and Planning
- Furniture and Equipment Inventory
- Move Plan/Occupancy Scheduling
- Procurement Services
- Vendor Coordination
- On-Site Move Coordination

Often times, end users are so familiar with their day-to-day process that they cannot fully explain their spacial needs. Gilbane worked with the end users to understand and analyze their needs, goals and mode of operation through in-depth meetings as well as “a day in the life of” recreation. Once the objectives and needs were fully understood, the TPM team created a master move schedule based on the termination dates of the existing warehouse and space lease agreements as well as the critical construction deadlines. Of additional importance, the team worked with archivists to measure and inventory boxes and items, thereby determining the layout and need of the pre-archival and archives collection storage.

Before the moving company was hired, stringent regulations and policies were outlined in the bidding documents in order to ensure proper conservation practices were in place during the physical transportation of the items. Some of these protocols included the moving team wearing white gloves while transporting the items and compliance with only stacking items/boxes within the designated heights per the specifications.

Gilbane TPM, working with the Archives, Library and Records staff, ensured all items were cared for, documented at each step of the move and that the transition was completed on-time, without closing archive or museum access to the public for a single day.

Fast Facts

- Installation of 15.43 miles of new and relocated moveable shelving into 2.2 miles of new rails.
- Unique artifacts included the original guest register for the infamous Yuma prison, museum collections including ancient Native American pottery and artifacts, and public records like the court records for the Miranda case.
- Amy O’Brien, Transition Manager and Beca Kulinovich, Transition Executive, together, volunteered over 100 hours to assist with the conservation and packing of photographs, museum artifacts and the care and organization of public records.
- The transition was completed on-time, without closing to the public for a single day.