

Consent Item D.3.1. Award of Bid #2007/08-07-001, Furniture & Equipment Moving Prepared by Bill Clark and Storage at Various Sites, GMP Contract May 6, 2008

**BACKGROUND:**

The following public projects were advertised as legally required and bids opened on Thursday, May 1, 2008:

**BID #2007/8-07-001 FURNITURE & EQUIPMENT MOVING & STORAGE AT VARIOUS SITES; GMP CONTRACT**

Each bid was carefully analyzed and all bidder's references were checked. Analysis was weighted 55% on price and 45% on past performance and also rated based on large volumes of work completed in a short timeframe. Bid forms are attached, and include line items such as labor, packaging, and storage. This is a contract intended to meet the District's furniture and equipment moves and storage associated with Phase One modernization effort at Rio Seco School, Carlton Hills School, Carlton Oaks School, Sycamore Canyon School, and Phase Two work at Cajon Park School. The bid also included a criteria that the companies guarantee a maximum price (GMP).

<b>COMPANY</b>	<b>GMP BID PRICE</b>
<i>Sullivan Moving &amp; Storage</i>	\$161,247.00
<i>Complete Relocation Services</i>	No Bid
<i>Alexander's Mobility Services</i>	\$228,786.55
<i>Cor-o-van Moving &amp; Storage</i>	\$114,784.00
<i>Boyer Moving</i>	No Bid

Each bid was carefully analyzed and the lowest responsible, responsive bidder was reviewed and references checked.

Administration also seeks approval to solicit bids for move and storage services required for the next phase of modernization work scheduled for the Fall of 2008.

**RECOMMENDATION:**

It is recommended that the Board of Education award Bid #2007/08-07-001, Furniture & Equipment Moving and Storage at Various Sites, GMP Contract to Cor-o-van Moving and Storage for the base bid amount of \$114,784.00.

It is also recommended that the Board authorize administration to solicit bids for move and storage services for the next phase of modernization work.



**BID RESULTS**

**FURNITURE & EQUIPMENT MOVING & STORAGE AT VARIOUS SITES;  
GMP CONTRACT #2007/8-05-001**

**Cor-O-Van Moving & Storage**

Line Item	Description	Guaranteed Maximum Price
1	Rio Seco School	\$ 28,988.00
2	Cajon Park School	\$ 13,910.00
3	Carlton Hills School	\$ 28,988.00
4	Carlton Oaks School	\$ 28,988.00
5	Sycamore Canyon School	\$ 13,910.00
6	Base Bid Total	\$ 114,784.00

**Sullivan Moving & Storage**

Line Item	Description	Guaranteed Maximum Price
1	Rio Seco School	\$ 41,377.00
2	Cajon Park School	\$ 19,103.00
3	Carlton Hills School	\$ 41,152.00
4	Carlton Oaks School	\$ 40,375.00
5	Sycamore Canyon School	\$ 19,240.00
6	Base Bid Total	\$ 161,247.00

**Alexander's Mobility Services**

Line Item	Description	Guaranteed Maximum Price
1	Rio Seco School	\$ 58,077.15
2	Cajon Park School	\$ 38,098.80
3	Carlton Hills School	\$ 46,469.40
4	Carlton Oaks School	\$ 36,792.15
5	Sycamore Canyon School	\$ 49,169.00
6	Base Bid Total	\$ 228,786.55

Note: CRS and Boyer Moving attended pre bid job walks, but did not submit bids.



Consent Item D.3.4. Pre-procurement of HVAC Equipment – Trane Award  
Prepared by Bill Clark  
May 6, 2008

### **BACKGROUND:**

The District is preparing to begin major modernization projects. Capital improvement projects require many pre-planning events and securing equipment to ensure the construction timeline is met is one of these events. Therefore, at its April 15, 2008 meeting, the Board of Education approved pre-procurement planning and operational strategies to ensure that the major capital improvement projects are managed effectively.

Proposals were received from Trane and Carrier for the pre-procurement of HVAC equipment for all nine school modernizations. Under Trane's bid, Guaranteed Pricing was achieved for all work so the Capital Improvement Program and delivery schedule deadlines for the summer modernizations will be met.

Trane was the lowest, qualified bidder. Additionally, administration is please to share with the Board that the Trane unit is a slightly more efficient product using eco-friendly refrigerant, than the unit proposed by Carrier, which will increase the District's energy savings and rebate. Attached is a summary of both vendors that bid on the project and this summary is prepared by Douglas E. Barnhart.

### **RECOMMENDATION:**

It is recommended that the Board of Education award the bid for pre-procurement of HVAC equipment to Trane. This action is recommended for approval by the Board to ensure that the District's major capital improvement projects are managed effectively thereby minimizing delays and cost increases. The ultimate goal is to make certain that the construction timeline is met by pre-procuring long lead item equipment.

This item supports the following District goals:

- Provide facilities that optimize the learning environment for all students.
- Pursue actively the funding and resources to fulfill our mission and maintain fiscal solvency.

### **FISCAL IMPACT:**

The fiscal impact of the pre-procurement of the HVAC equipment is \$2,181,405. Construction costs are per the program budget of \$2.5 million approved by the Board of Education on April 1, 2008. The project budget report is attached and highlighted to show revenue sources already approved by the Board. The budget of the Capital

Improvement Program is \$128.7 million for nine (9) school modernizations, and this cost will be funded from CIP funds, Prop R bond proceeds, and State modernization matching funds.

**STUDENT ACHIEVEMENT IMPACT:**

Strong, positive relationships exist between overall building conditions, a positive learning environment, and student achievement.

						Agenda Item D.3.4.
--	--	--	--	--	--	--------------------

Santee School District

EARLY PROCUREMENT OF MECHANICAL EQUIPMENT - PRICING SUMMARY

4/16/2008

District Budget: 2.4 Million

Phase 1 School

(Alternate Base Bid)

	SYCAMORE CANYON	RIO SECO	CARLTON OAKS	CARLTON HILLS	CAJON PARK	Carrier Total	Trane Total
Carrier Base Bid	\$ 192,488	\$ 213,336	\$ 213,336	\$ 187,945	\$ 182,557	\$ 989,662	
Trane Base Bid 15 SEER	\$ 154,950	\$ 174,120	\$ 174,120	\$ 155,550	\$ 152,690	\$	\$ 811,430
Carrier Addendum				\$ 5,269		\$	
Trane Addendum 15 SEER				\$ 400		\$	\$ 400
Carrier Alternate Add				\$	\$ 7,543	\$ 7,543	
Trane Alternate Add 15 SEER				\$	\$ 6,670	\$	\$ 6,670
Carrier Alternate Bldg A	\$ 7,878	\$ 7,878	\$ 7,878			\$	
Trane Alternate Bldg A	\$ 7,280	\$ 7,280	\$ 7,280			\$	\$ 14,560.00
Carrier Alternate Bldg C	\$ 10,958	\$ 10,958	\$ 10,958			\$	
Trane Alternate Bldg C 15 SEER	\$ 9,700	\$ 9,700	\$ 9,700			\$	\$ 19,400
Carrier Library Tech	\$ 34,558	\$ 34,558	\$ 34,558	\$ 34,558	\$ 34,558	\$ 138,232	
Trane Library Tech 16 SEER	\$ 31,920	\$ 31,920	\$ 31,920	\$ 31,920	\$ 31,920	\$	\$ 127,680
Carrier Library Technology	\$ 23,124					\$	
Trane Library Technology 2 15 SEER	\$ 20,650			\$ 83,113		\$	\$ 20,650
Carrier Classroom 10 Bldgs		\$ 83,113	\$ 83,113	\$ 83,113		\$ 249,339	
Trane Classroom 10 Bldgs 15 SEER		\$ 68,775	\$ 68,775	\$ 68,775		\$	\$ 206,325
						\$ 1,450,841	\$ 1,207,315

Totals Phase 1 Schools

Phase 2 Schools

	HILL CREEK**	CHET HARRETT**	PROSPECT AVENUE**	PEPPER DRIVE**	Carrier Total	Trane Total
Carrier Base Bid	\$ 213,336.00	\$ 222,530.00	\$ 187,418.00	\$ 179,875.00	\$ 803,159.00	
Trane Base Bid 15 SEER	\$ 174,120	\$ 179,950	\$ 154,360	\$ 152,320	\$	\$ 660,750
Carrier Alternate Bldg A	\$ 7,878				\$ 7,878.00	
Trane Alternate Bldg A	\$ 7,280				\$	\$ 7,280
Carrier Alternate Bldg C	\$ 10,958				\$ 10,958.00	
Trane Alternate Bldg C 15 SEER	\$ 9,700				\$	\$ 9,700
Carrier Library Technology Services	\$ 34,558				\$ 34,558.00	
Trane Library Technology Services	\$ 31,920				\$	\$ 31,920
Carrier Library Technology		\$ 23,124			\$ 23,124.00	
Trane Library Technology 2 15 SEER		\$ 20,650			\$	\$ 20,650
Carrier Classroom 10 Bldgs	\$ 83,113	\$ 83,113		\$ 83,113	\$ 249,339.00	
Trane Classroom 10 Bldgs 15 SEER	\$ 68,775	\$ 68,775		\$ 68,775	\$	\$ 206,325
					\$ 1,129,016.00	\$ 936,625

Totals Phase 2 Schools

SEER to EER Conversion Chart

3 ton: 15 SEER = 12.87 EER

4 ton: 15 SEER = 13.35 EER

5 ton: 15 SEER = 13.14 EER

Potential Escalation on Phase 2 schools (1 year calculation)

\$ 37,465

Savings by going with Trane (estimated escalation included)

\$ 2,181,405

\$ (398,452)

Notes on Trane Equipment

- 1) Phase 2 Schools do not include 1% escalation factor applied per quarter, starting June 2008. Trane is working with their factory to drop this charge if possible.
- 2) Carlton Hills- Trane Addendum in their proposal is really the addendum (base bid) price. The number shown above as the addendum is the alternate to add the Kitchen.
- 3) Lead time 4 weeks
- 4) Equipment comes with 2nd set of filters (construction and final)
- 5) Trane equipment exceeds the specified EER ratings and will provide additional energy savings to the District, see SEER to EER Conversion Chart

Notes on Carrier Equipment

- 1) Carrier equipment pricing is fixed through 2009
- 2) Lead time 8 weeks
- 3) Equipment comes with construction filters only.
- 4) Equipment curbs and economizers have no escalation restrictions and Carrier is working with their supplier on locking or limiting any potential escalation costs. (estimated escalation 30K)

General Notes

Alternate on Carlton Hills is an addendum to the DSA drawings; the drawings were already approved by DSA before the alternate was done.

Santee School District  
9625 Cuyamaca Street  
Santee, CA 92071

Date: April 22, 2008

## Letter of Intent

### Contractor Name & Address:

Trane  
3565 Corporate Court  
San Diego, CA 92123  
Attn: Mr. Clinton Losey, Sales Engineer  
LEED Accredited Professional  
Phone Number: (858) 576-2500  
Fax Number: (858) 576-2554

### Project: **Early Procurement of Mechanical Equipment for nine (9) Santee Schools**

Mr. Losey, Congratulations on your successful bid for the Contract for the Mechanical Equipment for the above project. This letter shall serve as the District's letter of intent.

Work shall commence on Tuesday, April 22, 2008 to meet installation dates to accommodate the phasing schedule attached and referred to as "Exhibit A".

Due to the short duration of the summer work, the District has proceeded with the early procurement of the Mechanical roof top units, economizers, power exhausts, and unit curbs. A competitive process covering all of the schools in the Santee Program was pursued between Trane and Carrier. Through this process, Trane has been selected as the lowest responsible supplier. The District by way of this letter of intent is directing Trane to proceed with submittals and procurement of the Phase 1 Mechanical Equipment defined in the attached schedule referred to as "Exhibit B". The District will not be purchasing the equipment from Trane direct. The individual school projects will be bid with multiple bid packages. The Mechanical bid package will carry the value of the mechanical equipment (defined in "Exhibit B"). The lowest responsible bidder will contract with Trane direct for the purchase of the mechanical equipment. The amounts listed in "Exhibit B" do not include sales tax. Subcontractor will include the applicable sales tax in their costs for the project which will be included in their contract with Trane. Subcontractor will proceed and have all obligations equal to those in a standard procurement process through the subcontractor, other than the submittal process will already be in progress. Subcontractor will be responsible for reviewing the submittals and adopting them as part of the scope of work and taking full responsibility for the equipment throughout the process, including all closeout and warranty requirements.

### Other Special Notices or Instructions:

The District is authorized to direct Trane to proceed with the work as the project cost, as determined from the competitive proposal process, is less than the 2.4 million dollar budget approved by the School Board on April 1, 2008.

Anticipated Contract Value (GMP): \$2,181,405 (includes 4 quarters of escalation on Phase 2 schools at 1% per quarter).

### DISTRICT:

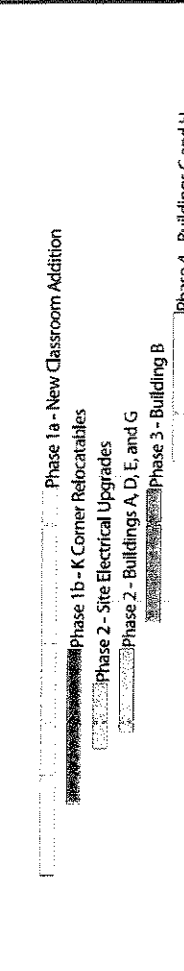
By \_\_\_\_\_ Date: \_\_\_\_\_  
Bill Clark, Assistant Superintendent, Business Services



**Santee School District**

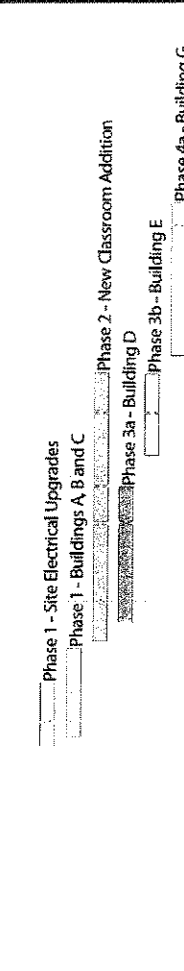
**Cajon Park Modernization**

Activity ID	Activity Description	Orig Dur	Early Start	Early Finish
14090	Phase 1a - New Classroom Addition	197	14MAR08*	22DEC08
18095	Phase 1b - K Corner Relocatables	81	05MAY08*	27AUG08
18133	Phase 2 - Site Electrical Upgrades	34	16JUN08*	01AUG08
18125	Phase 2 - Buildings A, D, E, and G	43	27JUN08*	27AUG08
18150	Phase 3 - Building B	68	16SEP08*	22DEC08
18170	Phase 4 - Buildings C and H	78	12JAN09*	30APR09



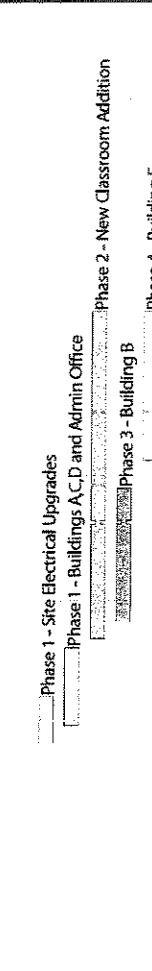
**Carlton Hills Modernization**

Activity ID	Activity Description	Orig Dur	Early Start	Early Finish
42042	Phase 1 - Site Electrical Upgrades	33	17JUN08*	01AUG08
42040	Phase 1 - Buildings A, B and C	46	24JUN08*	27AUG08
40090	Phase 2 - New Classroom Addition	137	02SEP08*	18MAR09
42065	Phase 3a - Building D	70	16SEP08*	24DEC08
42090	Phase 3b - Building E	41	16JAN09*	16MAR09
42118	Phase 4a - Building G	79	30MAR09*	20JUL09



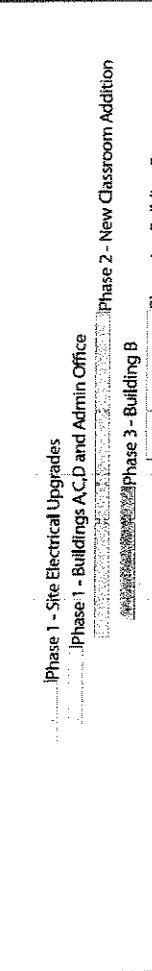
**Rio Seco Modernization**

Activity ID	Activity Description	Orig Dur	Early Start	Early Finish
22042	Phase 1 - Site Electrical Upgrades	24	18JUN08*	22JUL08
22040	Phase 1 - Buildings A, C, D and Admin Office	41	01JUL08*	27AUG08
23090	Phase 2 - New Classroom Addition	167	03SEP08*	30APR09
22065	Phase 3 - Building B	68	16SEP08*	22DEC08
22090	Phase 4 - Building E	78	12JAN09*	30APR09



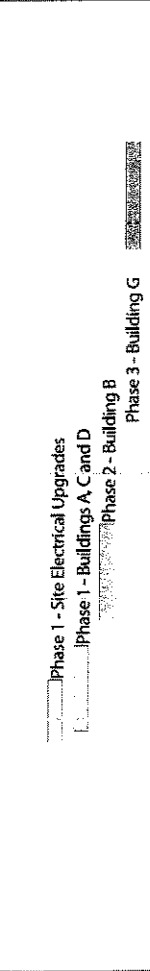
**Carlton Oaks Modernization**

Activity ID	Activity Description	Orig Dur	Early Start	Early Finish
32042	Phase 1 - Site Electrical Upgrades	32	18JUN08*	01AUG08
32040	Phase 1 - Buildings A, C, D and Admin Office	41	01JUL08*	27AUG08
30090	Phase 2 - New Classroom Addition	166	03SEP08*	29APR09
32065	Phase 3 - Building B	68	16SEP08*	22DEC08
32090	Phase 4a - Building E	78	12JAN09*	30APR09



**Sycamore Modernization**

Activity ID	Activity Description	Orig Dur	Early Start	Early Finish
52042	Phase 1 - Site Electrical Upgrades	32	18JUN08*	01AUG08
52040	Phase 1 - Buildings A, C and D	44	26JUN08*	27AUG08
52065	Phase 2 - Building B	50	16SEP08*	24NOV08
50090	Phase 4 - New Library Building E	116	15JUN09*	25NOV09
52090	Phase 3 - Building G	55	15JUN09*	31AUG09



Run Date

28JAN08 13:17

SX01

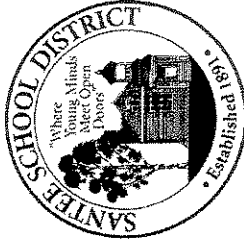
Sheet 1 of 1



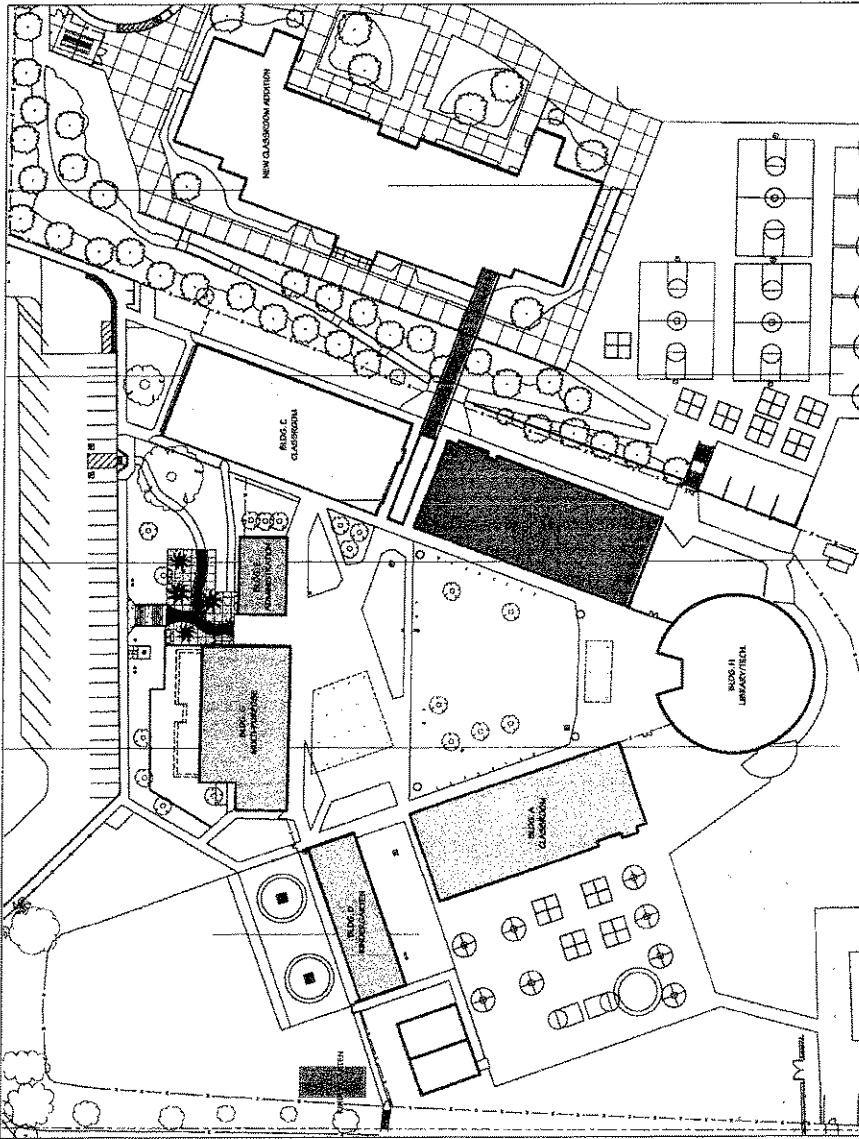
Santee School District  
Master Program Summary Schedule



© Primavera Systems, Inc.

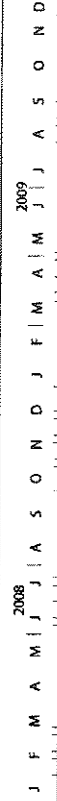


**CAJON PARK SCHOOL  
SANTEE SCHOOL DISTRICT  
PHASING, PLAN & SCHEDULE**



**LEGEND**

	START	END
PHASE 1a - New Classroom Addition	3/14/08	12/22/08
PHASE 1b - K Corner Relos	5/5/08	8/27/08
PHASE 2 - Bldg. A, D, E, & G Modernization	6/16/08	8/27/08
PHASE 3 - Bldg. B Modernization	9/16/08	12/22/08
PHASE 4 - Bldg. C & H Modernization	1/12/09	4/30/09



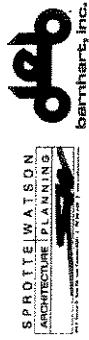
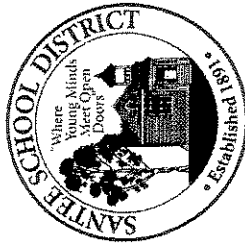
Phase 1a - New Classroom Addition

Phase 1b - K Corner Relocatables

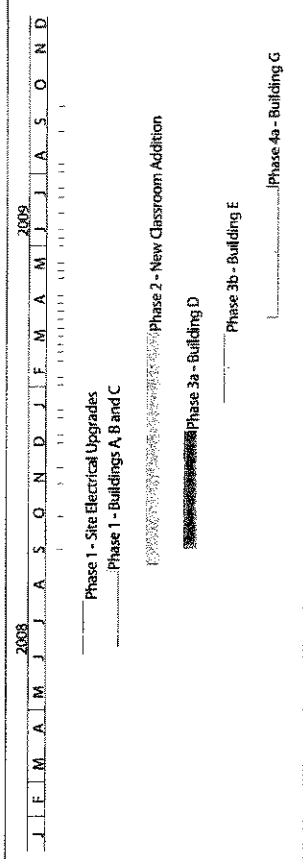
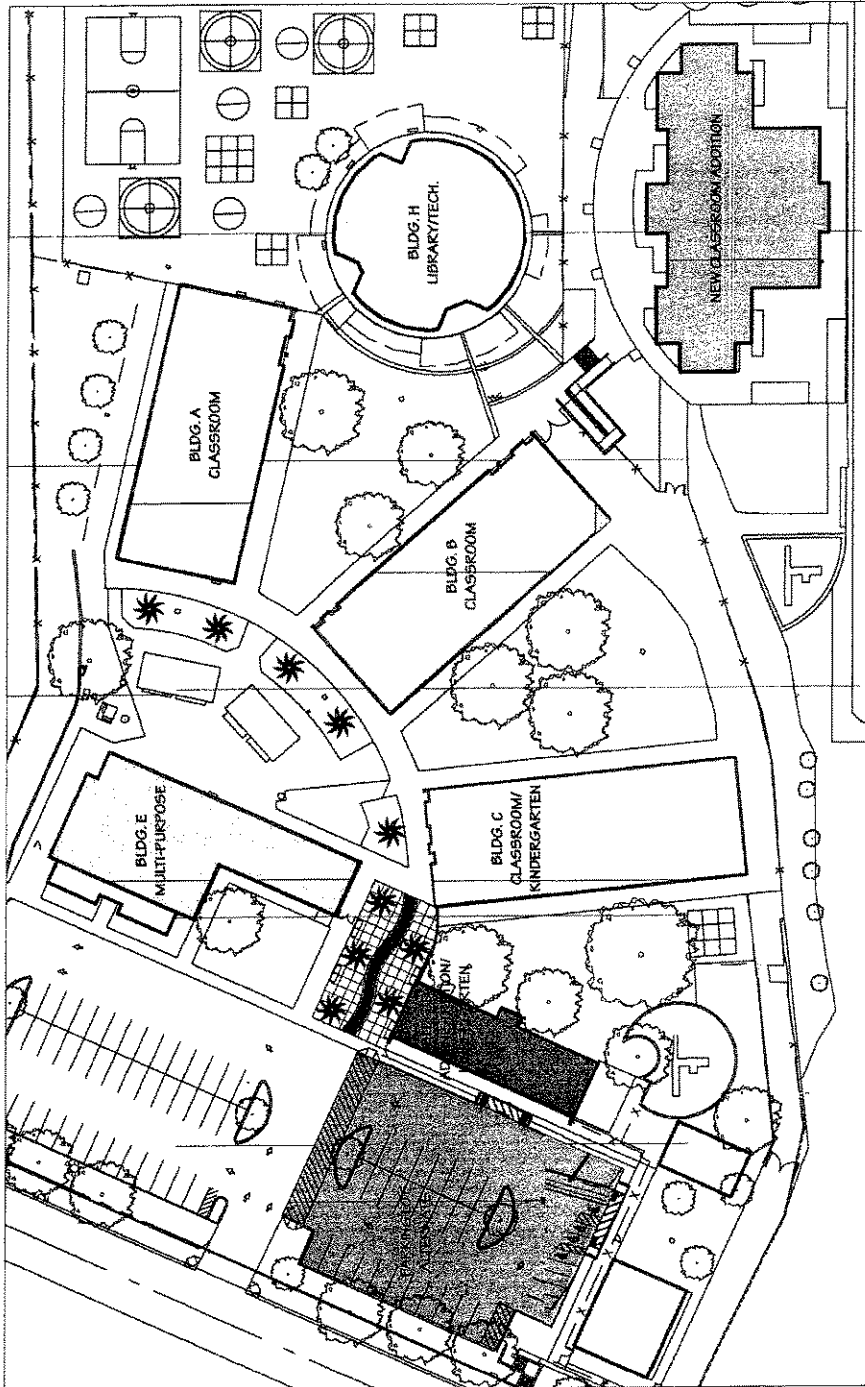
Phase 2 - Site Electrical Upgrades  
Phase 2 - Buildings A, D, E, and G

Phase 3 - Building B

Phase 4 - Buildings C and H

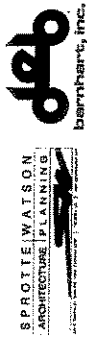


**CARLTON HILLS SCHOOL  
SANTÉE SCHOOL DISTRICT  
PHASING, PLAN & SCHEDULE**

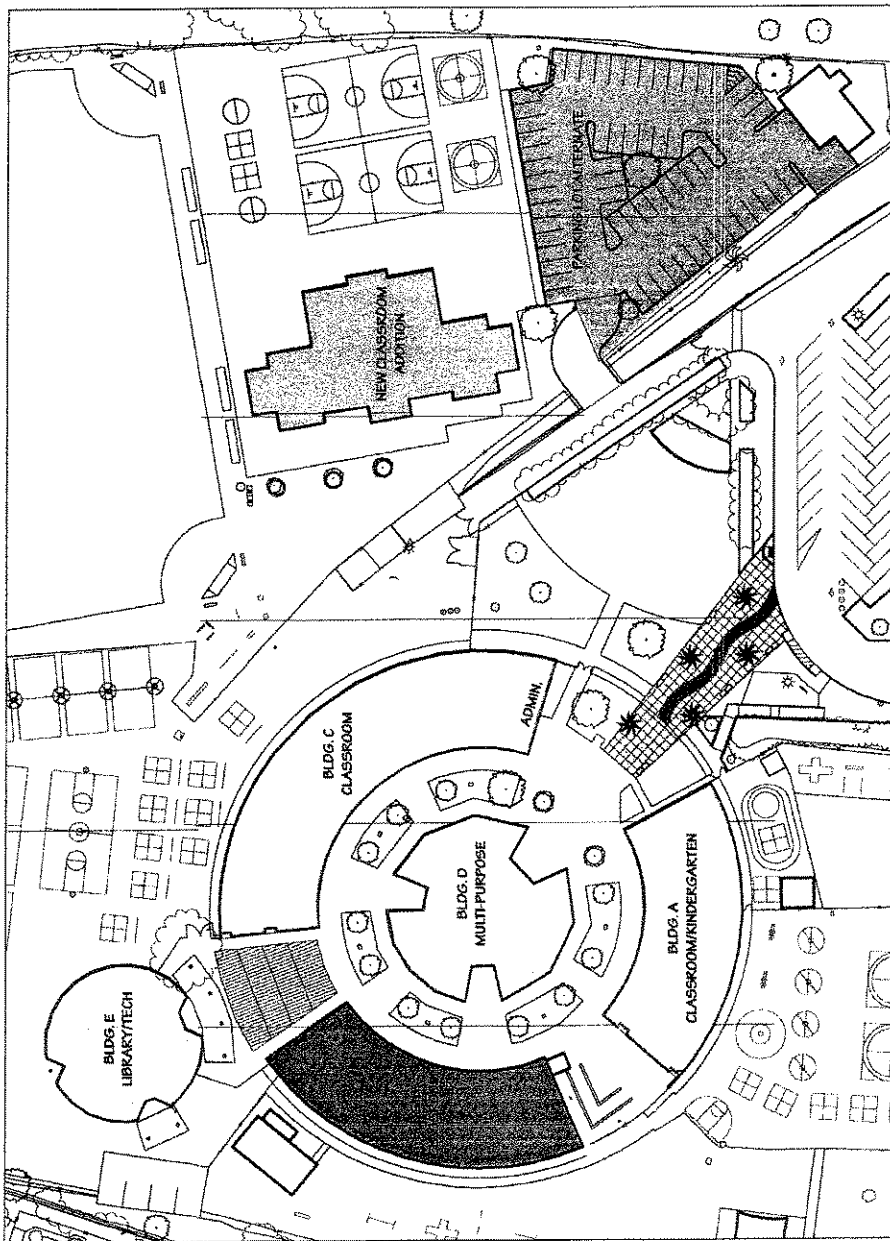


**LEGEND**

PHASE	START	END
PHASE 1 - Bldg. A, B, & C Modernization	6/17/08	8/27/08
PHASE 2 - New Classroom Addition	9/2/08	3/13/09
PHASE 3a - Bldg. D Modernization	9/16/08	12/22/08
PHASE 3b - Bldg. E Modernization	1/16/09	3/13/09
PHASE 4a - Bldg. H Modernization	3/30/09	7/17/09



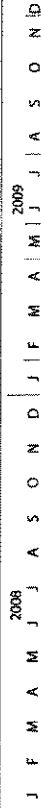
**CARLTON OAKS SCHOOL  
Santee School District  
PHASING, PLAN & SCHEDULE**



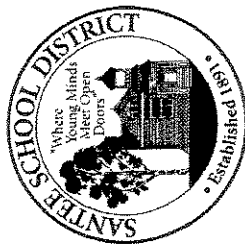
**LEGEND**

- PHASE 1 - Bldg. A, C, D & Administration Office Modernization
- PHASE 2 - New Classroom Addition
- PHASE 3 - Bldg. B Modernization
- PHASE 4a - Bldg. E Modernization

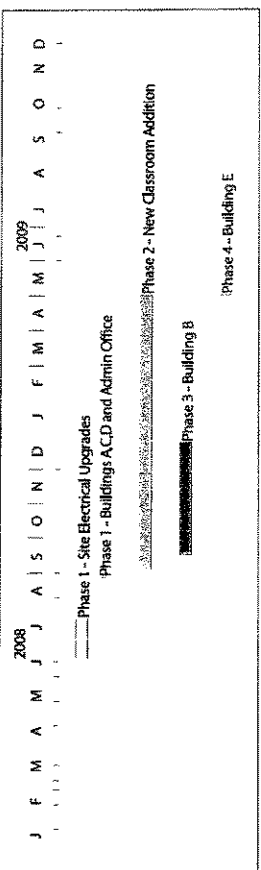
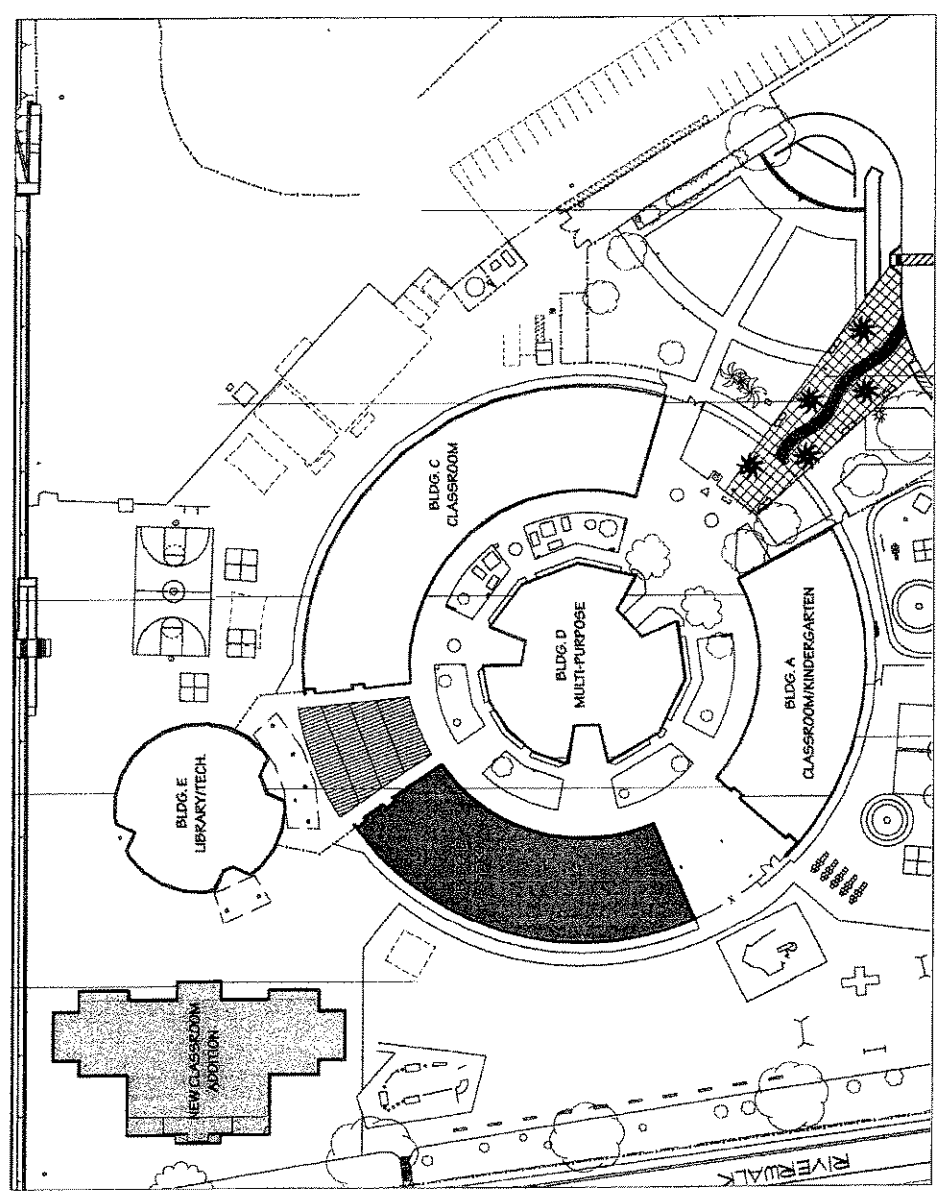
START	END
6/18/08	8/27/08
9/3/08	4/29/09
9/16/08	12/22/08
1/12/09	4/30/09



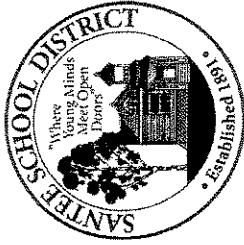
- Phase 1 - Site Electrical Upgrades  
Phase 1 - Buildings A, C, D and Admin Office
- Phase 2 - New Classroom Addition
- Phase 3 - Building B
- Phase 4a - Building E



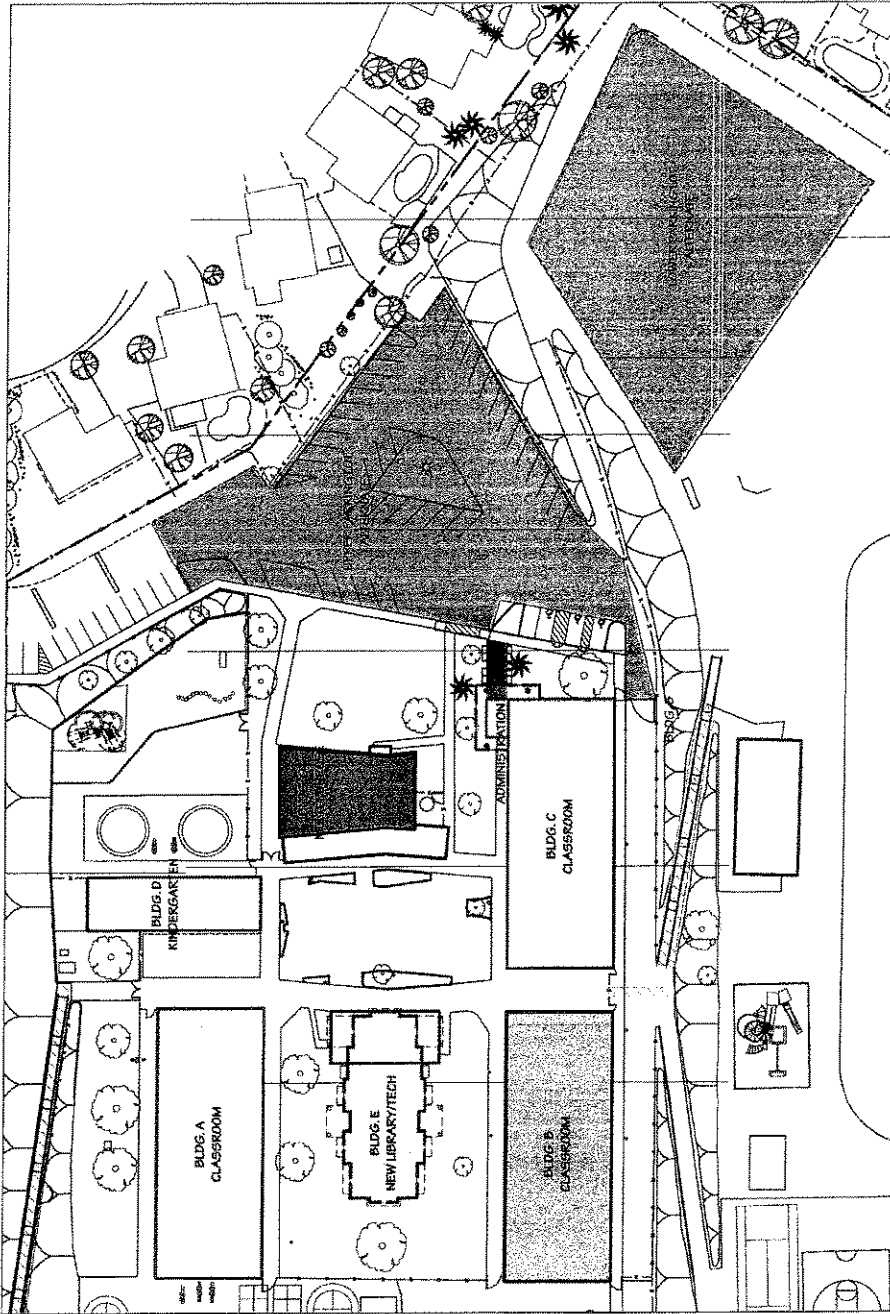
**RIO SECO SCHOOL  
SANTEE SCHOOL DISTRICT  
PHASING, PLAN & SCHEDULE**



LEGEND	START	END
PHASE 1 - Bldg. A, C, D, & Administration Office Modernization	6/18/08	8/27/08
PHASE 2 - New Classroom Addition	9/3/08	4/30/09
PHASE 3 - Bldg. B Modernization	9/16/08	12/22/08
PHASE 4 - Bldg. E Modernization	1/12/09	4/30/09

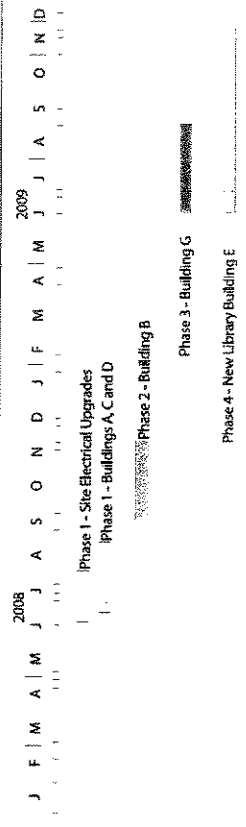


**SYCAMORE CANYON SCHOOL  
SANTÉE SCHOOL DISTRICT  
PHASING, PLAN & SCHEDULE**



**LEGEND**

PHASE	START	END
PHASE 1 - Bldg. A, C, & D Modernization	6/18/08	8/27/08
PHASE 2 - Bldg. B Modernization	9/16/08	11/24/08
PHASE 3 - Bldg. G Modernization	6/15/09	8/31/09
PHASE 4 - New Library Bldg. E	6/15/09	11/25/09



Discussion and/or Action Item E.3.1.  
Prepared by Bill Clark  
May 6, 2008

Approval of Modified Agreement with Eric Hall  
and Associates

### **BACKGROUND:**

During the past year, the District utilized the services of Eric Hall and Associates. Services by Mr. Hall and his firm include:

- Securing a Memorandum of Understanding for a mitigation agreement with Barrett American;
- Securing a developer fee agreement with Lennar;
- Establishing a District policy on school capacity; and
- Increasing State facility funding eligibility along with higher developer fee rates and incomes based on new findings about District eligibility options..

Eric Hall and Associates assisted the District through a consultant contract on an hourly basis. At this time, continued and additional services from Mr. Hall are needed to secure potential agreements for the Pardee project and to finalize agreements with Barrett American. Assistance in work at the State level is needed to secure additional facilities funding to meet our District's Capital Improvement Program \$165 million goals. Specific areas of work for Eric Hall and Associates to focus on in the future include:

- Increasing our new construction eligibility State School Facility Funds;
- Engaging developer fee negotiations with Pardee;
- Finalizing the details of the MOU agreement with Barratt American of which an MOU has been completed.
- Assisting the District in securing the former Santee School Property development and waiver requirements;
- Continuing contract negotiations with other large property developers; and
- Capital Improvement Program strategic support.

### **RECOMMENDATION:**

It is recommended that the District contract for the services of Eric Hall and Associates on a monthly, prefixed rate of \$3,000 in lieu of the current hourly contract. Services provided would be on a month to month basis, as needed.

This recommendation supports the following District goals:

- Provide facilities that optimize the learning environment for all students.
- Pursue actively the funding and resources to fulfill our mission and maintain fiscal solvency.

**FISCAL IMPACT:**

The fiscal impact to contract for the services of Eric Hall and Associates on a monthly, prefixed rate is \$3,000 per month. It is estimated that services would be completed in six to ten months for a total fiscal impact of \$18,000 to \$30,000. This amount is paid from Capital Fund 25. The balance of this fund for 2007-08 through 2008-09 is estimated to be \$450,000.

**STUDENT ACHIEVEMENT IMPACT:**

This is a fiscal item related to facilities. All fiscal resources impact student achievement.

						Agenda Item E.3.1.
--	--	--	--	--	--	--------------------



**Eric Hall & Associates LLC**

*Helping your school facility program measure up*

5431 Avenida Encinas / Suite H / Carlsbad / CA / 92011

P 760.602.9352 / C 760.519.8531 / F 760.602.9341

[eric@erichallassociates.com](mailto:eric@erichallassociates.com)

***Santee School District***

***Exhibit "B"***

***Compensation and Payment Schedule***

Contract price shall be at the rate of \$3,000 per month, payable on the first day of each month. The contract price shall include customary expenses.

The Consultant shall be reimbursed any extraordinary expenses for special projects or for pre approved travel or consultant time mutually agreed to and approved in advance by the District. The following schedule shall apply for special projects:

President, \$195 per hour

Associate, \$100 per hour

Admin Support, \$25 per hour