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).

COMPANY	GMP BID PRICE
Sullivan Moving & Storage	\$161,247.00
Complete Relocation Services	No Bid
Alexander's Mobility Services	\$228,786.55
Cor-o-van Moving & Storage	\$114,784.00
Boyer Moving	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.

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 for the awarded project is \$114,784.00 and will be funded through the Capital Improvement Program. The anticipated fiscal impact of storage services is unknown; however, an anticipated cost factor is \$15,000.00. These costs will be provided out of the Capital Improvement Program revenue sources already approved by the Board for this purpose.

# STUDENT ACHIEVEMENT IMPACT:

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

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# 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	\$ 228786.55

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

Consent Item D.3.3. SDG&E New Services Relocation Fees: Prepared by Bill Clark Carlton Hills, Rio Seco, Carlton Oaks May 6, 2008

# BACKGROUND:

The District's Capital Improvement Program project requires new electrical services at all schools. As the modernization project designs progress, it has been determined that the following three schools will need new service feeds due to the location and limitations of the current electric service:

Carlton Hills Rio Seco Carlton Oaks

# **RECOMMENDATION:**

It is recommended that the Board of Education authorize/ratify that SDG&E install new primary service feeds to ensure readiness for our summer modernization work at three school sites Carlton Hills, Rio Seco, and Carlton Oaks schools.

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 work required by San Diego Gas & Electric (SDG&E) was estimated at \$270,000 for the three sites referenced above. District administration and the electrical engineers negotiated with SDG&E to reduce these costs. SDG&E agreed to a new service feed at a cost of \$18,000 per site feed, for a negotiated total cost of \$54,000, for the three school sites recommended in this item. The fiscal impact of \$54,000 from the Capital Improvement Program budget of \$128.7 million for school modernizations, will be funded from CIP funds, Prop R bond proceeds, and State modernization matching funds. The project budget report is attached.

# STUDENT ACHIEVEMENT IMPACT:

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

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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.

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4/16/2008

Santee School District

District Budget: 2.4 Million

Phase 1 School					(Alternate Base Bid)	~		
	SYCAMORE CANYON	NAON	RIO SECO	CARLTON OAKS	CARLTON HILLS CAJON PARK	CAJON PARK	Carrier Total	Trane Total
Carrier Base Bid	31 3	192,488	\$ 213,336	\$ 213,336	\$ 187,945	\$ 182,557	\$ 989,662	THE COLUMN SANCTON OF THE PROPERTY OF THE PROP
Trane Base Bid 15 SEER	11 5	154,950	\$ 174,120	\$ 174,120	\$ 155,550	s		\$ 811.430
Carrier Addendum					\$ 5,269		\$ 5.269	
Trane Addendum 15 SEER					\$ 400			\$ 400
Carrier Alternate Add	<b>M</b>					\$ 7,543	\$ 7,543	
Trane Alternate Add 15 SEER						\$ 6,870		\$ 6.870
Carrier Alternate Bldg A	w		\$ 7,878	\$ 7,878			\$ 15,756	
Trane Alternate Bldg A			\$ 7,280	\$ 7,280			- Company of the Comp	\$ 14 560 00
Carrier Alternate Bldg C			\$ 10,958	\$ 10,958			\$ 21.916	200000
Trane Alternate Bldg C 15 SEER			\$ 9,700	\$ 9,700		The state of the s		19 400
Carrier Library Tech			\$ 34,558	34,558	\$ 34,558	\$ 34.558	438 232	COL (2)
Trane Library Tech 16 SEER			\$ 31,920	3 3 920	14	37 920		127 680
Carrier Library Technology	*	23,124		***************************************			\$ 23 12d	2001/2
Trane Library Technology 2 15 SEER	49	20,650		***************************************				\$ 20.650
Carrier Classroom 10 Bldgs		-	\$ 83,113	\$ 83,113	\$ 83.113	***************************************	\$ 249.339	
Trane Classroom 10 Bidgs 15 SEER			\$ 68,775	\$	S	***************************************		\$ 206.325
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		HILL CREEK**   CHET HARRETT**   DOOGDECT AVE
	Phase 2 Schools	

	HILL CREEK**	1	CHET HARRETT**	CHET HARRETT**   PROSPECT AVENUE**   PEPPER DRIVE**	PEPPER DRIVE**	Carrier Total	Trane Total
Carrier Base Bid	\$ 2	213,336.00 \$	\$ 222,530.00	\$ 187,418.00 \$	\$ 179.875.00	\$ 803 159 00	ON AIRTOCK IN ACTION OF THE OWNER OF THE OWNER OWNER OF THE OWNER
Trane Base Bid 15 SEER	¢s;	174,120 \$		£ŋ.	1		S 660 750
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Carrier Alternate Bldg C	5	10,958				\$ 10.958.00	CC W
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Carrier Library Technology Services	45	34,558				\$ 34 558 00	2010
Trane Library Technology Services	3	31,920					31 920
Carrier Library Technology				\$ 23,124		\$ 23.124.00	27212
Trane Library Technology 2 15 SEER		W		\$ 20,650			\$ 20,650
Carrier Classroom 10 Bldgs	**	83,113	\$ 83,113		\$ 83.113	\$ 249.339.00	The second secon
Trane Classroom 10 Bldgs 15 SEER	\$	68,775 \$	\$ 68,775		\$ 68,775		\$ 206,325
					Totals Phase 2 Schools	\$ 1,129,016.00	\$ 936,625
						Sylmentic Control of the Control of	W. W. C.

# SEER to EER Conversion Charl

3 ton; 15 SEER = 12.87 EER

4 ton: 15 SEER = 13.35 EER

5 ton: 15 SEER = 13.14 EER

Savings by going with Trane (estimated escalation included)

Trane Total \$ 2,143,940

2,579,857 Carrier Total \$ 2,579,857

Total Phase 1 & 2 Schools

\$ 2,181,405 (398,452)

37,465

(1 year calculation)

Potential Escalation on Phase 2 schools

Trane Price w/ estimated escalation

# Notes on Trane Equipment

# 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. 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
- Equipment comes with 2nd set of filters (construction and final)
   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

- Carrier equipment prioring is fixed through 2009
   Lead time 8 weeks
   Equipment comes with construction filters only.
- 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 Disticts letter of intent.

Work shall commence on <u>Tuesday, April 22, 2008</u> 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 then 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.

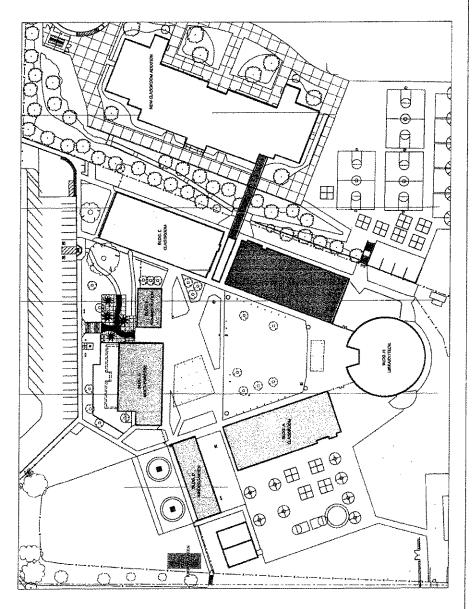
Anticipated Contract	Value (GMP):	\$2,181,405	(includes 4	quarters	of escalation	on Phase	2 schools	at 1%
per quarter).								

DISTRICT:		
By	Date:	
Bill Clark, Assistant Superintendent, Business Services		

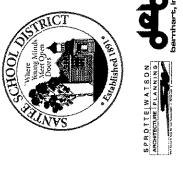
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Rio Seco Modernization					THE PROPERTY OF THE PROPERTY O	
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22090 Phase 4 - Building E		78	12JAN09*	30APR09	Foundation Flags 4 - Building	ikling F
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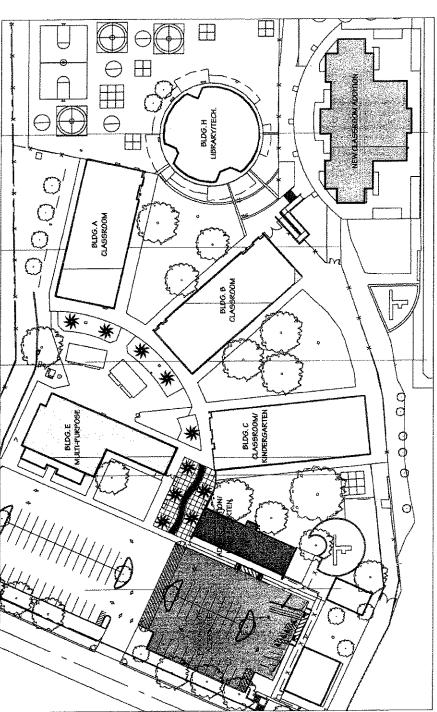




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LEGEND	PHASE 1a - New Classroom Addition	PHASE 1b - K Corner Relos	PHASE 2 - Bldg. A, D, E, & G Modernization 6/16/08	PHASE 3 - Bldg. B Modernization	PHASE 4 - Bldg. C&H Modernization



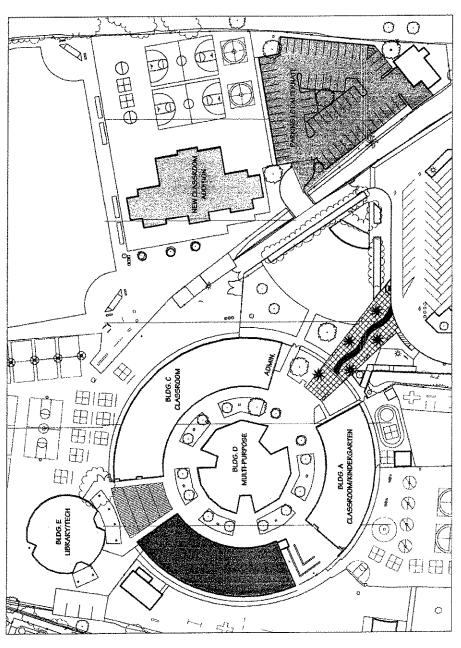




LEGEND	START	END	2009 2008 2009 2009 2009 2009 2009 2009
PHASE 1 - Bidg. A, B, & C Modernization	6/17/08	8/27/08	Phase 1 - Site Electrical Upgrades ————————————————————————————————————
PHASE 2 - New Classroom Addition	9/2/08	3/13/08	(2) 1985 (1995)
PHASE 3a - Bidg. D Modernization	9/16/08	12/22/08	Caracter and Phase 3a - Building D
PHASE 3b - Bidg. E Modernization	1/16/09	3/13/09	Fhase 3b - Bullding E
PHASE 4a - Bldg. H Modernization	3/30/09	7/17/09	JPhase 49 - Building G

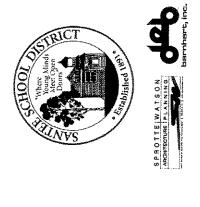




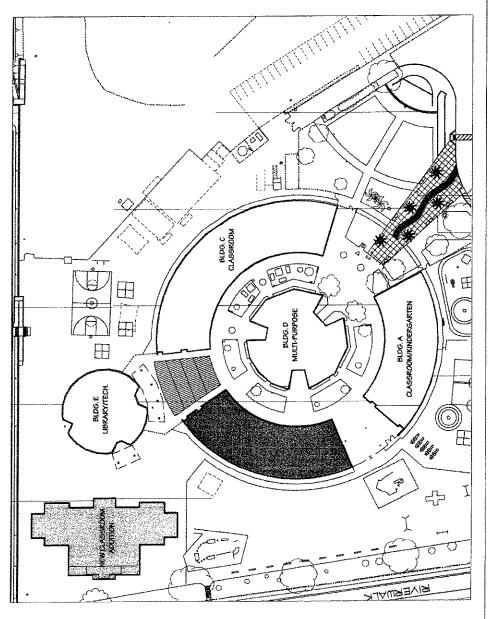


LEGEND	START	END	2008 2 2009 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2
PHASE 1 - Bidg. A, C, D & Administration Office Modernization	6/18/08	8127108	Phase 1 - Site Electrical Upgrades Phase 1 - Situldings AÇD and Admin Office
PHASE 2 - New Classroom Addition	90/2/6	4/29/09	Species Species Statement Species Statement Species Sp
PHASE 3 - Bldg. B Modernization	9/16/08	12/22/08	議事等機能與實施的。 B Building B
PHASE 4a - Bldg. E Modernization	1/12/09	4/30/09	Phase 4a - Building E

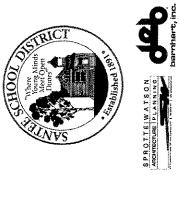
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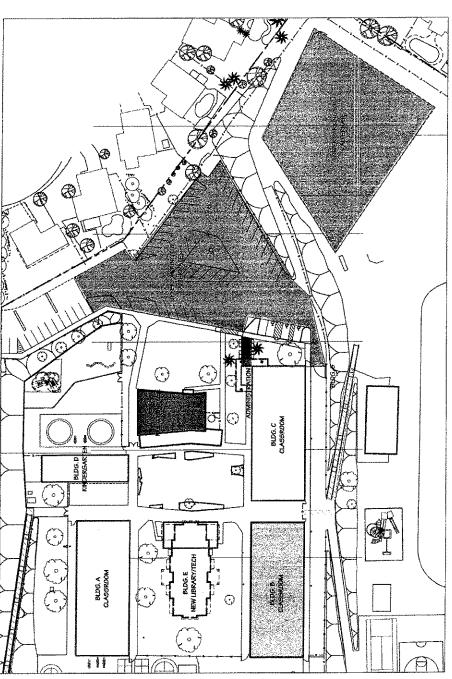




LEGEND	START	END	J F M A M J J A S O N D J F M A M J J A S O N D
PHASE 1 - Bldg. A, C, D, & Administration Office Modernization	6/18/08	8/27/08	Phase 1 - Site Bectrical Upgrades Phase 1 - Buildings AC,D and Admin Office
PHASE 2 - New Classroom Addition	9/3/08	4/30/09	是是一个一个一个一个一个一个一个一个一个一个一个一个一个一个一个一个一个一个一
PHASE 3 - Bidg. B Modernization	9/16/08	12/22/08	Les controlles 3 - Building 8
PHASE 4 - Bldg. E Modernization	1/12/09	4/30/09	Phase 4 - Building E







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PHASE 2 - Bldg. B Modernization	9/16/08	11/24/08	Phase 2 - Building B
PHASE 3 - Bldg. G Modernization	6/15/09	8/31/09	Phase 3 - Building G ###################################
PHASE 4 - New Library Bidg. E	6/12/09	11/25/09	Phase 4- New Library Building E

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.

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## 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