

November xx, 2019

We are pleased to invite you to participate in the selection process for a Facilities Condition Assessment (FCA) focused on the Town of Exeter buildings. The historic Town of Exeter (founded in 1638) is a 19.8 square mile town with a population of approximately 15,000 residents set in Rockingham County in the seacoast of NH. The Town of Exeter owns (XX) properties of varying ages and types. They include multiple uses and functions and are located throughout the town.

The Town of Exeter has completed facilities assessments on multiple properties over the last ten years. Each of these assessments did not establish a baseline or a rating system that would enable the town to manage the properties, establish priorities, and track facilities conditions over time. They did not specifically identify maintenance and the overall condition of the building and did not distinguish between facilities needs and programming. The information in these studies may be useful for documenting the building's history and current condition at the time of the assessment.

Since the time of our last study, the town has formed a Facilities Advisory Committee to create a management structure and database tool designed to be used on an ongoing basis to support capital and facilities planning. The tool is intended to use the information collected under this RFP and other sources, in conjunction with available proven technology, to create a different methodology for integrated facilities management.. The goal of *this RFP* is to create a database and reporting structure that is easy to update and maintain, and can be integrated with Exeter's existing asset inventory system (XXXX) and work order system (MaintXXXX). Going forward, completed projects will be seamlessly integrated into a living data base.

This tool will be a key part of Exeter's facilities planning initiative leading to a Facilities Master Plan and a Facilities Policy. Prior to the commencement of that planning process, a complete Facilities Condition Assessment is necessary. Obtaining an understanding of the condition and backlog of work for each facility will inform decision making in the development of the master plan and policy.

Project Scope:

We understand that there are different methodologies to preparing an FCA. Through the interview process we will learn how your team will approach an FCA. How will you engage with our team and make use of existing data? We ask that you explain your process and prepare and present a proposed scope of work that accommodates key goals and deliverables.

We are not starting from scratch. We have existing data that should help to streamline this process. There are a total of (xx) buildings to survey, comprising (xxxx) GSF. We have provided a listing of all our buildings (attached), highlighting the facilities to be included in the FCA. Other Town of Exeter buildings can be listed as a part of the data base, but no survey work is necessary by your team.

The scope of work includes the following:

- 1) **Review the 2015 Town Wide Facilities Plan, the 2018 Exeter Town Masterplan, Public Works Department (DPW) current work order data base, as well as other related reports as recommended by the selected firm and/or as directed by the Town of Exeter.:**
- 2) **Meet with members of the Facilities Advisory Committee, DPW, Town Manager, Select Board Representative to the Facilities Advisory Committee, and DPW Facilities Maintenance Manager** to gain an understanding of current, recurring, and future issues. The Exeter team will be available to walk with the FCA team during the physical survey periods.

- 3) **Survey core facilities** to create a complete assessment of the current condition and identify needs for action (repair/replacement). Items to be surveyed include:
- o **Site:** (Building proper to 5' around perimeter), Utility connections and shutoffs, paving systems, stairs, retaining walls, exterior lighting and other landscape elements
 - o **Exterior Systems:** Roofs, walls, window systems, exterior doors and structural components
 - o **Interior Systems:** Walls, doors, floors, ceilings, visible structure and finishes
 - o **Health/Fire/Life Safety Issues**
 - o **Accessibility (ADA and otherwise)**
 - o **Heating, Ventilation and Air Conditioning** (where applicable - many buildings don't have air conditioning)
 - o **Electrical Systems**
 - o **Plumbing Systems**
 - o **Vertical Transport (Elevator)**
 - o **Energy (including efficiency, conservation and sustainability)**
 - o **Security Hardness**
 - o **Environmental: identify possible risk conditions**
 - o **Building Code compliance**
- 4) **Prepare Action Recommendations - Scoping, budgeting and prioritization**
- o Create a report and listing of all action recommendations for each of the facilities. Data shall be collected and organized to allow for a variety of sorting possibilities with the primary deliverables to be sortable by the following categories
 - Deficiency priority (defined below)
 - Deficiency category (defined below)
 - Facility Type
 - Action type
 - Repair Costs
 - o Provide project (including design, contingencies, etc.) cost estimates for renewal needs identified. FCA teams shall share how estimates will be developed (using industry standards, cost or CM consultants, etc.). Estimates shall be created in 2020 dollars with a listing of anticipated escalation factors for each year, based on current industry expectations for comparable municipal facilities in New England. Employ a computerized database system that will automate annual updating of action costs based on published inflation rate indices for Exeter, NH.
 - o Provide specific scopes of work and estimates for each individual item in all categories.
 - o Use lifecycle cost analysis and remaining useful life to help determine whether an item may be replaced. Review useful life expectancies with Town of Exeter for systems and components being reviewed. Identify remaining useful life associated with each of the following categories: regular maintenance/repair, major maintenance/repair, major upgrades/modernization.
 - o Calculate the current replacement value (CRV) for each building
 - o Provide automated means of inflating CRV's over time
 - o Calculate the Facility Condition Index (FCI) and Facility Condition Needs Index (FCNI) for each of the buildings.
 - o Do you offer a service for updating costs regularly - please describe and outline
 - o At the direction of the town, coordinate assessments with third parties executing studies for other public facilities. For example, the selected firm will collaborate with the firm executing the operational and facility study for the public safety building.

5) Develop Renewal Prioritization Categories

With the deliverables of this work, Exeter will develop a capital renewal plan. Prioritization will be a key component of the study as there are never enough funds to address all the needs. The FCA team shall work with the Exeter team to define the types of prioritizations, but in the past these categories have roughly included the following:

o Priority 1 - Immediate Need

Projects in this category require immediate action to:

- a. correct a cited safety hazard
- b. stop accelerated deterioration
- c. and/or return a facility to routine operation

o Priority 2 – Critical

Projects in this category include actions that might be addressed in the short-term:

- a. repairs to prevent further deterioration
- b. improvements to facilities associated with critical accessibility needs
- c. potential safety hazards

o Priority 3 – Important

Projects in this category include major or minor maintenance or upgrades that contribute significantly to extending the useful life of a facility or expanding its functionality.

o Priority 4 – Non-Critical

Projects in this category include:

- a. improvements to facilities associated with non-critical accessibility needs
- b. actions to bring a facility into compliance with current building codes as grandfather clauses expire
- c. actions to improve the usability of a facility following an occupancy or use change.

6) Define Renewal Need Classification

All cyclical renewal needs shall be classified by UNIFORMAT II classification protocols. All non-cyclical project recommendations what utilize UNIFORMAT wherever possible.

7) Identify Energy Conservation and Efficiency and Sustainability Projects

Environmental Stewardship is one of the hallmarks Exeter’s Master Plan. We want to identify projects that can help reduce our overall carbon footprint and reduce annual operating energy costs. We also want to identify projects that can make Exeter’s facilities sustainable. These types of projects shall be identified and sortable in the asset reports. This work will be correlated with efforts and planning developed by the Town’s Energy Committee and Sustainability Advisory Committee.

8) Data Management & Deliverables

Exeter’s preference is to have the final deliverable/data provided in a Microsoft Excel Database to be managed by Exeter.

9) The proposed software tool should provide readily accessible facilities information to support the municipal planning and decision-making processes on issues that impact town facilities. Identifying the current needs and predicting future needs will provide a basis for purchasing facility capital renewal. The Facility Condition Assessment software must provide the ability to identify needs across multiple assets through utilization of user-defined queries. The results of such queries should allow for rapid export (via MS Excel or html files) for quick integration into Exeter’s Asset Management System (XXX) and

our Computerized Maintenance Management System (CMMS) - (XXX). The Exeter team will participate with the FCA Team to determine the appropriate integration. Add Alternate 1: Provide proposed fees associated with hosted management by the FCA team, but editable by appropriate Exeter personnel. Also provide schedule of anticipated costs going forward (annual database update with town's updated information, anticipated schedule of future assessments, etc.) No hardcopy books will be required however we would like a final summary presentation/overview report in a .pdf printable form.

10) Additional Service - Provide framework for Facility Renewal Forecasting

Long-range funding needs for facilities are ascertained by identifying the rate of affordable investment required to maintain components of each facility as it depreciates and becomes unusable. The FCA Team must provide data in a manner that Exeter may create and adjust long term financial forecasting and have the ability to:

- o Analyze multiple year outlooks and various combinations of building-type reinvestment rates.
- o Employ a system that generates multi-level financial modeling based upon deferred renewal backlog, capital renewal, and selected time frame. Systems should be capable of analyzing and projecting funding for any time period as defined by Exeter.
- o Establish a building component lifecycle inventory to forecast investment rates required to maintain facilities over time. Computerized system shall enable graphic reporting of renewal requirements for individual facilities or grouped facilities and shall provide lifecycle evaluation.
- o Understand Exeter's average annual investments in facilities in the recent past separated by funding mechanism (General Fund, Lease/Purchase, Bonding).
- o Track and model for current and future situations.

Project Schedule

Exeter's goal is to complete the 2020 Facilities Condition Assessment by November 20th 2019.

The schedule for the selection process and key facility availability dates are as follows:

- RFP Issued – July 23rd 2019
- RFP Responses Due on August 20th, 2019
- Shortlisted Teams will be notified by Friday, August 27th 19th, 2019 and invited to an interview.
- Interviews will be scheduled for the week of September 23rd (dates tbd)
- Kick-off the week of September 12th, 2019
- Access to other buildings - to be scheduled to avoid disruption of program needs.
- Final reports with cost information to be completed by November 20th, 2019.

Proposal Requirements:

Proposals are due at 12 Noon on Tuesday August 20th July 12th, 2019. Please provide electronic copy of your proposals. There is not a limit on the number of pages, but in consideration of your time and our review, please keep the proposals as brief as reasonably possible. Submissions should be e-mailed to:

Russell Dean – Town Manager
rdean@exeternh.gov
Town of Exeter NH
10 Main Street

Submissions shall include:

- **Cover letter**
- **Firm Background:** Please include a brief background of your organization, its history and the primary markets and services you provide.
- **Relevant Project Experience:** Please include a listing of the institutions or municipalities for whom you have completed a similar scope of work in the last five years. Please include a minimum of (3) case studies or project information sheets on the most relevant projects. It will be particularly interesting to know what similar institutions you have partnered with to understand benchmarking - how does our overall amount of space in various areas compare to others.
- **Proposed Project Team Members and Availability:** Please provide a project organizational chart. Include resumes of key team members - how and who do you propose will be doing the surveying? Covering architecture, structural, exterior envelop, MEP engineering, cost estimating, and other necessary team members. Who will be the overall project manager and/or be our key contacts. It will be most important to see that the team doing the work has worked together on prior projects (and projects included in the experience section). Please provide a listing of the current projects the key team members are working on and what % of their time you anticipate being dedicated to this project. (We realize it will fluctuate over the course of the project, include overall average).
- **Proposed Project Schedule/Work plan:** Based on the critical onsite survey window - please provide a schedule showing the ideal weeks/timing of meetings with the Exeter team, other survey time needed. Please provide an overview of key meetings, survey time, milestones and deliverables. What key information and/or decisions you need from Exeter at specific times in order to complete the work as scheduled.
- **Project Approach:** This is a key section for you to share how your firm/team approach facility condition assessments and how you propose do execute the project and provide the data necessary. How will we be able to integrate it with existing systems and update? For those who are invited to an interview - we look forward to a demonstration.
- **Deliverables:** Provide sample deliverables that highlight both your team's technical skills as well as the ability to deliver an effective and graphically pleasing presentation - both at a summary level for academy leadership and at a detailed level for the Facilities Management team.
- **References:** Please provide three references for institutions with whom you have partnered on similar scopes of work with similar team leadership and management. Please include updated contact information - name of the reference, current role (and/or role when you worked with them), email and phone number.
- **Fee Proposal:** List proposed fees for suggested scope of work as well as optional services. Fees for the facilities condition assessment for buildings surveyed and including all others in the database (providing a platform where PEA can add their own assessments) shall be listed as one fee. Please provide separate break out numbers for annual updates, data hosting fees, and other optional services, such as bar coding equipment, and capital planning consulting. Please include hourly rates for all team member levels.

Interviews:

For the shortlisted listed firms we will hold at the town offices, interviews will be as noted above.

60 minutes will be allotted for the interview. The time will be up to your team to determine how to spend. We encourage you to bring the people that we will be working with on a day to day basis. We are most interested in your approach to our project - how you will survey and engage with our team. What does the deliverable look like? Summary reports, graphics, and how do you interface with the software? A

live demonstration should be part of the interview. What do you need from us? Please share relevant experience as it relates to this work.

If you have any questions send via email. All questions should be directed to Russell Dean.

Attachments:

- Town Map
- Building Lists, addresses, known dates of construction, GSF - Core buildings highlighted.