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REQUEST FOR PROPOSAL
Inventory and Condition Assessment of Facilities at Gillette Ranch
Calabasas, California

Mountains Recreation and Conservation Authority
April 2006

1. BACKGROUND

This Request for Proposal (RFP) consists of completing a condition assessment and preparing life cycle and recurring maintenance data for facilities at King Gillette Ranch (currently known as Soka University of America) in Calabasas, California. The project site consists of a 20-acre campus footprint that features approximately 75,000 square feet of building space, water and waste water utilities, gas and electrical utilities, phone and communication utilities, paved roads and parking areas, a bridge, and landscaped grounds and water features.

The project site is owned by the Mountains Recreation and Conservation Authority (MRCA), a Joint Powers Authority public agency. MRCA currently leases the campus area to Soka University of America for operation of a private graduate language school. The lease will expire on December 31, 2007, after which MRCA, in partnership with the National Park Service (NPS) and California State Parks (CDPR), will establish a visitor information center and other educational services for the Santa Monica Mountains National Recreation Area.

MRCA desires to gain a better understanding of the condition of facilities in the project area, including required rehabilitation, maintenance, and recurring operating requirements necessary to sustain the facilities in good condition. The data will be used as part of a planning program to determine appropriate facility uses and evaluate investment and operating budget requirements.

Because the project site is currently used for educational services, access to facilities will be controlled and must be scheduled in advance through MRCA (see Section 3: Advance Planning). The Contractor will submit a proposed site inspection schedule for approval by MRCA at the beginning of the contract period. The Contractor shall work closely with MRCA and its representatives in preparing inspections and required reports. The Contractor will develop cost estimates for all recurring maintenance, repairs, and component replacement requirements using industry accepted standards and estimates that accurately reflect anticipated costs for the geographic area and intended uses.

Along with comprehensive condition assessment inspections, contractors will also be conducting accessibility inspections for building assets and related features, including accessibility routes.

2. REQUEST for PROPOSAL TASKS

The MRCA is seeking proposals for an inventory, condition assessment, and maintenance plan for facilities at Gillette Ranch. The scope of facilities include approximately 75,000 square feet of historic and non-historic buildings, paved roads and parking areas, one bridge, landscaped grounds and water features, and utility systems. See Attachment A for a map of the project site and facility assets list. Buildings 1-14 on the asset list in Attachment A, their environs and associated utility system are the scope of this task. Subject to the availability of funds and opportunity, the Contractor may be offered the opportunity to perform the same range of tasks on an additional set of buildings and associated systems, or a portion thereof, as indicated on the facility asset list in Attachment A. The Contractor will perform the following tasks as part of the RFP:

2.1 Asset Inventory: Prepare an inventory of all facility assets and related features within the project site. The inventory will include (1) comprehensive photographs of each asset showing condition, (2) a location and layout plan for each asset and related features, including latitude and longitude as verified by Global Positioning (GPS), and (3) measurements of each asset and related features. Each asset will be labeled with a unique identifying name keyed to asset description data. The Contractor will prepare a description of each asset and related features that address information requirements contained in Attachment B, including Life Cycle Data such as year of construction or replacement, estimated design life, remaining condition life, and current replacement value.

2.2 Asset Condition Assessment: Prepare a condition assessment for each asset and related features within the project site., including, but not limited to, the architectural, civil, structural, mechanical and electrical components in each, as well as their suitability to meet requirements for seismic stability and general accessibility under the Americans with Disabilities Act (ADA). The condition assessment will identify and fully describe all deficiencies, including conditions that are out-of-compliance with building codes, industry safety and maintenance standards and practices, and manufacture recommendations. Each deficiency will include a description of required repairs necessary to bring the asset to acceptable and compliant condition, including a current cost estimate to perform repairs using an industry accepted cost estimating reference like R.S. Means. The cost estimate will consider contract administration, profit and overhead, geographic area adjustments, and any required design or engineering services. With respect to the structure referred to as the "Stable" or Building No. 8, the assessment should provide additional information on rehabilitative steps required to bring the building to a state of usability sufficient for non-residential occupancy. See Attachment C for additional condition assessment information requirements.

2.3 Asset Maintenance Plan: Prepare a maintenance plan for each asset and related features within the project site. The maintenance plan will include an annual and cyclic maintenance program for each asset and related features designed to (1) optimize the performance of the asset, (2) comply with applicable building and safety codes, (3) fulfill any manufacturer recommendations, (4) conform with industry accepted maintenance practices and standards, and (5) achieve the full service life of the asset. The maintenance plan will fully describe the annual and cyclic recurring maintenance requirements, including scheduling of requirements and estimated costs using an industry-accepted cost estimating guide like R.S. Means. Maintenance plans for historic structures shall follow historic preservation requirements contained in the Secretary of Interior Standards for Rehabilitation of Historic Properties. See Attachment D for additional maintenance plan information requirements.

Responsibilities

- Contractor shall observe OSHA standards for safety during all inspections and provide personal protective equipment for their employees at no cost to the MRCA where required. Areas that have suspected hazardous asbestos contamination, or "Certified Confined Spaces," shall not be entered, but shall be indicated on the assessment documentation.
- The contractor shall provide technically competent personnel on the inspection teams suited to the particular tasks that will most efficiently and effectively assess/evaluate the identified assets and develop the most beneficial recommended corrective actions and maintenance plans.

Inspection teams shall be equipped with an adequate supply of standard tools of the trade (hammer, screwdrivers, pliers, adjustable end wrench, ladders, flashlights, measuring tapes, etc.) as may be required to fulfill contract requirements.

- The contractor shall physically inspect each asset and associated features and components identified within the RFP. The RFP is for the asset inspection and not necessarily limited to the total gross square footage of the asset; inspections shall proceed while confirming gross square footage (GSF).
- The contractor shall provide all electronic hardware and basic operating system software necessary to complete the work under this contract at no cost to the MRCA. This includes but is not limited to computers, cameras, and transmission devices. There will be no MRCA furnished equipment provided to take pictures or GPS readings.
- The contractor shall ensure that all submissions to the MRCA are carefully checked to eliminate arithmetical, grammatical/typographical errors and inconsistencies.

3. ADVANCE PLANNING: Asset Data Review and Scheduling

Contractor shall coordinate with MRCA in the collection of available facility data records and plans in advance of field inspections. MRCA will provide logistical information to the Contractor that will help with scheduling inspections within 15 days of contract award. The MRCA-provided advance planning package will include the following:

- Marked-up project site map identifying general location(s) of assets;
- Appropriate maintenance personnel contact information; and
- Known black-out dates for inspecting assets in the field. Due to on-going educational activities being conducted in the buildings, inspection times will be limited. At this time, the following periods are available for inspection of buildings:

1. July 23-30, 2006.
2. September 10-20, 2006

Advance data provided by MRCA shall be used by the contractor to prepare a work plan and preliminary project schedule. The project schedule shall include (1) all field inspections, (2) report preparation and submission schedule, (3) MRCA review time for preliminary and final reports (15 working days each), and (4) a project completion milestone. The preliminary project schedule shall be forwarded to MRCA for review and approval prior to start of field inspections. The Contractor will be required to provide updates on key schedule milestones to MRCA throughout the duration of the contract.

MRCA will provide available asset data to the Contractor for specific assets 15 days prior to each scheduled inspection. Available data on existing building and utility systems is very limited. No architectural or as-built blue prints exist and there is very limited information on site utility systems. MRCA will arrange for the contractor to meet with the Facility Manager of Soka University to review facilities and provide specialized knowledge of asset conditions.

4. FIELD WORK: Onsite Inspections

Although many deficiencies will be obvious, some deficiencies are more subtle and will require further examination. Where an in-depth analysis is extremely cost prohibitive or destructive in nature, such as determining the source of a structural failure, the problem shall be noted as a deficiency and the Contractor shall generate an estimate for cost of the analysis or testing required.

Contractor shall visit each asset identified within this Request for Proposal (see Attachment A for a site map) and complete a visual inspection of all architectural, civil, structural, mechanical, and electrical components of each. In addition, contractor shall complete an accessibility inspection on each occupied building identified within this task

order to assess the level of compliance with the Americans with Disabilities Act and other state and federal accessibility laws and requirements.

5. PROGRESS REPORTING

Contractor shall arrange regular progress calls to include MRCA representatives. Progress call discussions shall include at a minimum:

- Daily/weekly progress;
- Updates to schedules, including detailed status update or re-plan that corresponds to the key milestones;
- Identification of issues and recommendations for follow-up action; and
- Review of data findings.

6. DELIVERABLES SUMMARY

6.1 Schedule of Submissions and Reviews

All submissions to the MRCA shall be carefully checked to eliminate arithmetical, grammatical, typographic errors and inconsistencies. Review and comments from MRCA shall be incorporated into data by the Contractor. When the Preliminary Draft Report is 60 (sixty) percent complete, two copies of the report will be provided to the MRCA for interim review, which shall be completed and all comments thereon provided to the Contractor within five (5) working days from the receipt of the Preliminary Draft Report.

6.2 Printed Report Deliverables

The contractor will deliver 6 (six) printed and bound copies of each of the following reports:

- Preliminary Draft Report organized by page number, table of content, sections, and appendices and containing the following sections: (1) executive summary, (2) inventory of assets and features, (2) condition assessment of assets and features, (3) corrective actions for addressing deficiencies, (4) maintenance plan for assets, (5) bibliography of resources used to prepare the report, and (6) appendices containing supporting information, including maps, plans, photographs organized by asset, asset data summaries and condition worksheets, cost estimates, the names of those associated with preparing the report and their credentials, and all technical reference guidelines.

- Final Report organized by page number, table of content, sections, and appendices and containing the following sections: (1) executive summary, (2) inventory of assets and features, (3) condition assessment of assets and features, (4) corrective actions for addressing deficiencies, (5) maintenance plan for assets, (6) bibliography of resources used to prepare the report, and (7) appendices containing supporting information, including maps, plans, photographs organized by asset, asset data summaries and condition worksheets, cost estimates, and all technical reference guidelines.

6.3 Electronic Data Deliverables

The Contractor will deliver two (2) CD copies of all reports required in Section 6.2 in MS Word (.DOC) and Adobe Acrobat Reader (.PDF) formats.

7. INVOICING

Contractors shall invoice monthly and provide breakout of cost in their invoices. Contractor shall submit a cover sheet that summarizes progress.

8. PERIOD OF PERFORMANCE

The period of performance for this contract is established from the point of award to final deliverables, with the following understandings:

Planning work can begin within 15 days following award (scheduling parks, setting up files, etc.), but no on-site inspections will begin until authorized by MRCA consistent with restrictions identified in Section 3: Advance Planning.

All work shall be completed within 90 days of contract award, unless specified otherwise by MRCA.

9. PRE-BID CONFERENCE

Contractors are invited to a pre-bid conference at the job site as follows:

Date: To be announced, expect to be scheduled one week from RFP distribution
Time: To be announced

The conference will allow contractors to ask questions on the scope and to clarify the final intent of the inspection requirements and deliverables.

ATTACHMENT A: Site Map and Asset Survey List



ATTACHMENT A (Continued): Facility Numbering System at Gillette Ranch/Soka (see also Existing Facilities map from 1991 EIR)

Bldg. No.	Soka Name (Primary Use for University)	Alternate Names (Association)	Year Built	Area(Sq. Ft) (1992 EIR)
			1955	24,008
1	Minuteman Hall (Assembly & Dormitory)	(Claretians)	1955	440
2	Mechanical / Laundry	(Claretians)	1928	26,610
3	Central Hall (Staff Quarters/Reception)	Mansion, Main House (Gillette/Brown/Neff)	1929	3,150
4	Faculty Residence (Grad Student Housing)	Garage (Gillette/Brown/Neff)	1928	1,845
5	Faculty Residence (Grad Student Housing)	Cook's House (Gillette/Brown), Meadow House	1960	21,519
6/7	Wisdom Hall, (Classroom, Dining & Kitchen)	(Claretians)	1928	5,882
8	Stable	(Gillette/Brown/Neff)	1970 est.	2,400
9	Barn, (Maintenance Shop)	Print Shop (Claretians)	1928	1,000
10	Dwelling - (Botanical Research Center)	White House/Cottage (Gillette/Brown)	1928	400
11	2 Car Garage (Seed House)	(Gillette/Brown)	1927	1,500
12	Dwelling (vacant) - on Las Virgenes	(Gillette/Brown)	1927	200
13	1 Car Garage (vacant)	(Gillette/Brown)	1927	2,400
14	Dwelling (vacant)- Across from Malibu Creek State Park entrance on Las Virgenes	(Gillette/Brown)	1947	(900)
15	Lost in the 1996 fire	Cabin (Wickland)	N/A	0
16	Building removed		1959	4,939
17*	Multi-Family Dwelling & Garage	MRCA Operations Center, Spensley, Dicences	N/A	N/A
18-21	Trailer Classrooms that were removed by Soka			
22	Outdoor Basketball Court			
23-26	Trailer Classrooms that were removed by Soka		1922	(350)
27	Barn, Burned in the 1996 fire	Saddle House (Cohn)	n.d.	(800)
28	Barn, Burned in the 1996 fire	Outbuilding	N/A	N/A
29-32	Trailer Classrooms that were removed by Soka		N/A	N/A
33	Classroom (probably removed by Soka)		n.d./1948	(392)
34*	Craft Room, (Mountain View)	MRCA, Outbuilding		
35*	Craft Room (Mountain View)	MRCA, Residence (Tobias)	N/A	N/A
36, 37	Buildings Removed		1938	1,500
38*	Dwelling, (Mountain View)	MRCA, Residence (Cohn)	n.d.	800
39*	Storage Shed, (Mountain View)	MRCA, Outbuilding (Unknown)	1936	1,500
40*	Dwelling, (Mountain View)	MRCA	1938/ 52	1,000
41*, 44*	Pool House / Dressing room, (Mountain View)	MRCA	n.d.	1,250
42*	4 Car Garage, (Mountain View)	MRCA	1936	2,000
43*	Dwelling, (Mountain View)	MRCA, (Cohn)	1989	611
45	Guardhouse (entrance gate/office)	(Soka)	??	
46	Tennis Courts	(Soka)		

* Bid additive if funds available

ATTACHMENT B: Information Requirements for Facility Asset Inventory

Item	Description
Current Replacement Value (CRV)	Utilizing industry accepted cost estimating techniques and guides, the Contractor shall calculate the CRV for all buildings and related features. CRV shall be calculated based on the predominant use of the asset.
Inspection information	Inspector name (Lead Inspector) Date(s) of inspection Hours: Number of hours spent required to complete inspection at asset. The inspection time shall be the total hours to inspect and the number of inspectors. This is NOT an auditable field and will not be used for invoicing/payment. This reference data that MRCA can use for future planning.
General information	Asset Name and Number (assigned by Contractor) Asset Type Year Built or Installed Quantity (Gross Square Footage, Gallons per Day, Voltage, etc.) Specific to Buildings: Building Type Construction Type Occupancy Classification
Latitude and Longitude	<ul style="list-style-type: none"> • For buildings, lat/long reading at front entry • For utilities, latitude and longitude readings shall be taken at the following locations: <ul style="list-style-type: none"> ○ GPS for all major equipment ○ GPS at start and end of distribution systems Latitudinal and Longitudinal readings taken at each asset shall be decimal degree and to the fifth decimal place and in compliance with NAD 83 (North American Datum of 1983)
Digital photographs	Asset reference photos shall be captured for buildings Photos of significant and/or unique deficiencies (not to exceed five (5) per asset) which most represent the overall condition of the asset Required photograph resolution is : 1440*960 or 960*1440 Final deliverable to be submitted on CD
Area Measurements	Quantity/Unit of Measure: For buildings, contractors shall calculate/validate gross square footage; for utility systems, contractors shall calculate/validate appropriate units of measure Specific to Buildings: Basement Area (if applicable) Footprint Area Roof Area Finished Floor Area (basement, first floor and other floors)

	Data specific to areas, sizes, volumes and costs estimates shall be prepared using English units.
Site Plans and Floor Plans	<p>Contractor shall map approximate asset locations on a scaled site map to show spatial relationships for information and planning purposes. The assets will be identified by name and code keyed to more detailed asset descriptions.</p> <p>Specific to Buildings: Contractor shall prepare scaled floor plans for each building, including basements, first, second, and third floors and associated outdoor plaza spaces as applicable.</p>
Life Cycle Data Capture	<p>Contractors shall capture life cycle data on all major assets and features, including:</p> <ul style="list-style-type: none"> • Date installed/Replaced (from nameplates, as-builts if known, interviews, or professional best guess) • Remaining Condition Life • Estimated Design Life

ATTACHMENT C: Information requirements for Facility Asset Condition Assessment

Item	Description
Deficiencies	<p>Contractor shall note all currently broken or deficient conditions for all assets and related features, including all conditions that are out of compliance with building codes, seismic requirements, industry safety and maintenance standards and practices, and manufacturer recommendations. The deficiency description will be keyed to the asset for easy reference. The deficiency description shall note the following minimum information:</p> <ul style="list-style-type: none"> • WHERE the deficient item is located in the facility (keyed to the asset and site map or building floor plan) • WHAT the item is (exterior door, chilled water pump, etc.) • DETAILS on the item (size, capacity manufacturer, model, etc.) • WHY the corrective action is needed or what is deficient (broken, missing, worn, obsolete, etc.) • CORRECTIVE ACTION (REPAIR, REPLACE, etc.) • QUANTITY of the deficient item requiring correction using standard units of measure, include unit of measure used. • COST required to correct the deficiency in accordance with accepted maintenance standards and practices, building and safety codes, historic preservation requirements, and manufacturer recommendations. Cost estimates will be developed using industry accepted cost estimating techniques and guides and shall reflect contract administration, profit and overhead, geographic area adjustments, and any required design or engineering services.

ATTACHMENT D: Information requirements for Facility Asset Maintenance Plan

Item	Description
Maintenance Plan	<p>Contractor shall prepare a scheduled maintenance plan for each major asset, including all buildings, roads, parking areas, landscaped grounds and water features, and major utility systems. The maintenance plan will include an annual and cyclic maintenance program for each asset and related features designed to (1) optimize the performance of the asset, (2) comply with applicable building and safety codes, (3) fulfill any manufacturer recommendations, (4) conform with industry accepted maintenance practices and standards, and (5) achieve the full service life of the asset.</p> <p>The maintenance plan will fully describe the annual and cyclic recurring maintenance requirements, including scheduling of requirements and estimated costs using industry accepted techniques and practices. Cost shall be developed using industry accepted cost estimating guides like R.S. Means. Maintenance plans for historic structures shall follow historic preservation requirements contained in the Secretary of Interior Standards for Rehabilitation of Historic Properties. Recurring maintenance costs will not be marked up for profit, contingency, etc.</p> <p>A total cost summary for executing the maintenance plan for all assets shall be included in the preliminary and final reports (see Section 6). The summary shall be broken down by asset and anticipated annualized maintenance costs.</p>