



Conceptual Stage
REDACTED

Fredericksburg City Public Schools
RFQ 202107-001
Solicited PPEA New Middle School

September 8, 2021

FIRSTCHOICE
Public-Private Partners

ENGLISH CONSTRUCTION COMPANY, INC.
MOSELEY ARCHITECTS

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September 8, 2021

Re: RFP #202107-001 PPEA New Middle School

Fredericksburg City Public Schools
Dr. Matthew Eberhardt, Deputy Superintendent
210 Ferdinand Street
Fredericksburg, VA 22401

Dear Dr. Eberhardt and Members of the Evaluation Committee:

First Choice Public-Private Partners (English Construction Company and Moseley Architects) is pleased to submit our conceptual stage proposal for your review under the Public-Private Education Facilities and Infrastructure Guidelines for the design and construction of a new middle school.

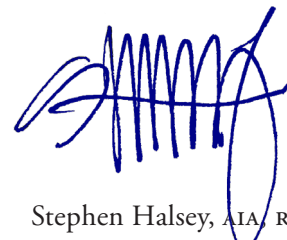
We are excited about the opportunity to continue a strong relationship with Fredericksburg City Public Schools (FCPS) and the City of Fredericksburg. First Choice has enjoyed working the FCPS and the City of Fredericksburg on eight projects and we understand your PPEA, permitting, and construction process to meet your deadlines. Together, we will draw from Moseley Architects' experience designing 74 new middle schools to finalize a design that meets your middle school program needs. We understand the need is great to address capacity issues from the elementary school level that is impacting middle school enrollment, while keeping the tight-knit community feel that FCPS has established with Walker-Grant Middle School. Through our design of 21st century learning spaces that are flexible and accessible to the community, we will continue to support the middle school mission of equipping scholars with knowledge and skills to contribute and succeed in an ever-changing local and global community.

We are acknowledging receipt of addendum one. For more information, please contact us at (434) 845-0301 or ahamblen@englishconst.com (804) 794-7555 or shalsey@moseleyarchitects.com. We welcome an opportunity to meet with you to discuss this new middle school project.

Sincerely,



Allen M. Hamblen
Executive-in-Charge



Stephen Halsey, AIA, REFP
Design Managing Principal
Vice President

Conceptual Stage

- 1 Project Characteristics — Redacted
- 2 Project Financing — Redacted
- 3 Project Benefit and Compatibility

Project Characteristics



1.A. DESCRIPTION OF THE PROJECT AND CONCEPTUAL DESIGN

This content is proprietary and has been redacted.



1.B. WORK TO BE PERFORMED BY THE SCHOOL BOARD

The success of this project lies in the ability of the First Choice team to collaborate closely with FCPS, the FCPS School Board, and project stakeholders throughout the design and construction process. The FCPS School Board will have review and approval authority on all project components. We envision that FCPS School Board members, stakeholders, and building user group representatives will actively participate in the following tasks:

- **Design Review and Approval** — The School Board will review the proposed design at key milestones and inform the First Choice team of any changes it may require. The School Board will facilitate communication between the design team and stakeholders.
- **Site Plan Review and Permitting** — First Choice will provide full site infrastructure engineering, soil analysis, and permitting assistance. The School Board will provide ongoing input throughout the design and construction process and will provide vital assistance with the FCPS site plan and building permitting process, including environmental permitting;

The School Board will also be responsible for the following and the various optional project components:

- **Moving Arrangements** — The School Board will arrange and pay for moving the various departments and other functions to their final location.
- **Computer, Communications, and Office Equipment** — The School Board will provide and install all desktop computers, servers, communications equipment, (wireless antenna, telephone, and handsets) and office equipment (copiers and shredders). First Choice will provide data and communications cabling from equipment rooms to wall and floor boxes.

Throughout each phase of the project, First Choice anticipates the following input from the FCPS school board.

Initial Project Development

We suggest establishing a design committee comprised of stakeholders, community members, middle school teachers, staff, and students. This committee will be involved throughout the programming, preliminary, and schematic design phases. They are a voice for building consensus with the greater community and sounding board for the needs of FCPS and the new middle school students.

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First Choice also asks that FCPS clearly verbalize and transcribe the vision and goals of the project.

The design team also expects that a strong communication protocol be established between the School Board, design team, stakeholders, and community.

Preliminary Design

First Choice will meet with members of the FCPS School board to discuss project goals and to begin aligning the project scope with the appropriated funding for the project. During these initial meetings, we will also discuss the educational program.

Moseley Architects will also involve FCPS and the community in planning sessions to review the goals of the new middle school.

Critical to the Preliminary Design Phase is our recommended design workshop, in which FCPS will be heavily involved. We will engage the community, FCPS, and other interested stakeholders to identify qualitative goals; present the building and site diagrams developed during the Conceptual Phase, have the design committee react to conceptual site and building diagrams developed in the Conceptual Phase, work in small groups to revise and refine these initial concepts; and build consensus for the most appropriate design option.

Moseley Architects can also organize additional community engagement based on the level of involvement FCPS desires. This decision will require input and involvement from FCPS.

First Choice will meet with the School Board as needed during the Preliminary Design Phase. During this phase, we will provide designs, project schedules, and cost options for FCPS to review and respond.

Detailed equipment layouts for each type of classroom or specialty space will be developed and reviewed with FCPS curriculum leadership and end-users to approve.

Design Development

First Choice will meet with the school board as needed during design development. During this phase, we will provide designs, project schedules, and cost options for FCPS to review and respond.

Detailed equipment layouts for each type of classroom or specialty space will be developed and reviewed with FCPS curriculum leadership and end-users to approve.

Final Design/Construction Documents

During the construction document and Final Design Phase, FCPS will be involved in building systems

confirmation, operations and maintenance goals, and reviewing the design in the context of education and instructional goals.

During the document review phase, FCPS will review working drawings, construction and phasing plans, and specifications for procurement of activities and scopes of work for the Construction Phase. First Choice will review drawings with the FCPS staff project team and the technical review committee.

During the permitting phase, we will assist FCPS in obtaining jurisdictional approvals.

The procurement phase will involve constant contact between FCPS and First Choice.

Construction Phase

The Construction Phase will also involve a close relationship with FCPS and First Choice. We will provide construction contract administration services. First Choice will lead and facilitate the following activities that FCPS will be involved in:

- Pre-construction conferences;
- Regular project progress meetings and distribute minutes;
- Regular and special site visits;
- Safety measures for same site, occupied replacement;
- RFIs, PCOs, and submittals;
- Contractor's requests for payment;
- Punch lists and verify substantial completion;
- Substantial completion certification; and
- Project close out

1.C. FEDERAL, STATE, AND LOCAL PERMITS AND APPROVALS AND A SCHEDULE FOR OBTAINING PERMITS AND APPROVALS

Our regulatory environment is extensive. In its design and construction, the project must comply with the following preliminary list of codes, regulations, standards, agencies, departments, etc.

- City of Fredericksburg and staff
- City of Fredericksburg Planning Commission
- City of Fredericksburg Fire Marshal and Building Official
- City of Fredericksburg Zoning Ordinance
- Virginia Department of Environmental Quality



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- Public Utility Companies
- Virginia Uniform Statewide Building Code (USBC)
- State Fire Prevention Code
- National Fire Protection Association (NFPA)
- International Mechanical Code (IMC)
- International Plumbing Code (IPC)
- National Electrical Code (NEC)
- Americans with Disabilities Act (ADA/ADAAG)
- Uniform Federal Accessibility Standards (UFAS)
- CABO/ANSI Accessibility Guidelines
- American Society for Testing and Materials (ASTM)
- Factory Mutual (FM)
- Underwriters Laboratories (UL)

First Choice anticipates that it will obtain normal federal, state, and local permits and approvals required for site, building design and construction, as well as stormwater, erosion and sediment control, environmental permitting, and utility connection permits. The FCPS school board will be the applicant for zoning-related approvals and First Choice team member Moseley Architects will provide technical assistance and documentation as well as assistance with necessary presentations.

For more details on a schedule for obtaining permits and approvals, please see item 1.F. Proposed Schedule of Work on the Project, including the Estimated Time for Completion on the following page.

1. D. ANTICIPATED ADVERSE SOCIAL, ECONOMIC, AND ENVIRONMENTAL IMPACTS OF THE PROJECT

No long-term adverse social, economic, or environmental impacts are anticipated as a result of this project. Construction noise and periodic, short-term disruption of traffic along Gateway Boulevard and Idlewild Boulevard should be anticipated in the immediate vicinity of the construction site. After construction is complete, traffic entering and exiting the site will require a connection between north and south Gateway Boulevard as well as additional turn lanes.



To the best of our knowledge, no environmental or archaeological assessments have been completed.

1. E. PROJECTED POSITIVE SOCIAL, ECONOMIC, AND ENVIRONMENTAL IMPACTS OF THE PROJECT

The economic boost from a large construction project supports many jobs and generates new tax revenues for both state and city governments. Also, the creation of employment opportunities is a goal of both city, regional, and state economic development agencies. The ability to demonstrate to prospective businesses that the FCPS is committed to supporting education can provide the City with the competitive edge it needs to attract the high quality, tax revenue enhancing economic development the City desires, and to support the region's pro-business climate.

1. F. PROPOSED SCHEDULE FOR THE WORK ON THE PROJECT, INCLUDING THE ESTIMATED TIME FOR COMPLETION

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1.G. ALLOCATION OF RISK AND LIABILITY FOR WORK COMPLETED BEYOND THE AGREEMENT'S COMPLETION DATE, AND ASSURANCES FOR TIMELY COMPLETION OF THE PROJECT

First Choice team member English Construction Company assumes standard risk and liability for contractor delays beyond the completion date, subject to mutually agreed time and conditions.

The contractual completion time for the project will be established cooperatively with FCPS as part of the comprehensive agreement negotiations. The contractual completion date will be subject to change for reasons such as, but not limited to, a change in the scope of work, unforeseeable issues arising from zoning or permitting, or unforeseeable site conditions. In summary, this would include all factors outside of our control and is usually established in contract terms.

For your new middle school project, the First Choice team assumes the risk for timely completion of the project for all items within our control. FCPS assumes and suffers no liability if the completion schedule is not within the contractual completion time under the contract terms.

The First Choice team is prepared to assume the customary performance risks for development, design, and construction. We are prepared to provide guarantees for said risk and look forward to drafting a comprehensive agreement with you to properly allocate risks and define responsibilities for timely completion. English Construction Company, Inc. does not anticipate a phased or partial opening of the new middle school prior to completion of the entire project.

1.H. ASSUMPTIONS RELATED TO OWNERSHIP, LEGAL LIABILITY, LAW ENFORCEMENT, AND OPERATION OF THE PROJECT AND THE EXISTENCE OF ANY RESTRICTIONS ON THE SCHOOL BOARD'S USE OF THE PROJECT

It is assumed that the FCPS School Board will own and operate the facility pursuant to this proposal. First Choice imposes no restrictions on such ownership or operation.



1.I. PROVIDE INFORMATION RELATIVE TO PHASED OR PARTIAL OPENINGS OF THE PROPOSED PROJECT PRIOR TO COMPLETION OF THE ENTIRE WORK

Because this project is located on City owned land and it a new site, there is no plan to include phased or partial openings for this project.

1.J. OTHER ASSUMPTIONS RELIED ON FOR THE PROJECT TO BE SUCCESSFUL

Project assumption are the same as the assumptions stated in Section 1.H.

1.K. CONTINGENCIES THAT MUST OCCUR FOR THE PROJECT TO BE SUCCESSFUL

Project contingencies are the same as the assumptions stated in Section 1.H.

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Project Financing



LEFT James Monroe High School, Fredericksburg City Public Schools

2.A. PRELIMINARY ESTIMATE AND ESTIMATING METHODOLOGY OF THE COST OF THE WORK BY PHASE, SEGMENT, OR BOTH

Our preliminary cost estimate and cost clarification information is proprietary and has been redacted.

2.B. PLAN FOR THE DEVELOPMENT, FINANCING, AND OPERATION OF THE PROJECT SHOWING THE ANTICIPATED SCHEDULE ON WHICH FUNDS WILL BE REQUIRED. DESCRIBE THE ANTICIPATED COSTS OF AND PROPOSED SOURCES AND USES FOR SUCH FUNDS INCLUDING ANY ANTICIPATED DEBT SERVICE COSTS. THE OPERATIONAL PLAN SHOULD INCLUDE APPROPRIATE STAFFING LEVELS AND ASSOCIATED COSTS. INCLUDE SUPPORTING DUE DILIGENCE STUDIES, ANALYSES, OR REPORTS.

Our proposal does not include project financing as we assume the City of Fredericksburg will issue general obligation bonds for the amount necessary to pay all project costs. We would anticipate the City will benefit from providing funds as they will receive significantly lower interest rates than funding through the private sector. The First Choice team will provide any information and documentation necessary to assist the City in navigating project financing.

The information below reflects our preliminary proportioning of project costs:

- A/E Fees — Reimbursed 80 percent during design phase; 20 percent during construction phase.
- Builders Risk Insurance — Reimbursed 100 percent during Mobilization Phase.
- Performance Bonds — Reimbursed 100 percent during Mobilization Phase.

- Construction Costs — Costs proportioned based on completed work on, invoiced monthly for the duration of construction.
- Contractor Fee — Costs proportioned equally during 16 months project duration.
- Allowances — Proportioned as reimbursable expenses are incurred.

2.C. ASSUMPTIONS UNDERLYING ALL MAJOR ELEMENTS OF THE PLAN. ASSUMPTIONS SHOULD INCLUDE ALL SIGNIFICANT FEES ASSOCIATED WITH FINANCING GIVEN THE RECOMMENDED FINANCING APPROACH. IN ADDITION, COMPLETE DISCLOSURE OF INTEREST RATE ASSUMPTIONS SHOULD BE INCLUDED. ANY ONGOING OPERATIONAL FEES, IF APPLICABLE, SHOULD ALSO BE DISCLOSED AS WELL AS ANY ASSUMPTIONS WITH REGARD TO INCREASES IN SUCH FEES.

Please refer to our response in Project Financing 2.B.

2.D. PROPOSED RISK FACTORS AND METHODS FOR DEALING WITH THESE FACTORS

First Choice envisions starting design on the new middle school in fiscal year 2021. Construction is shown in fiscal years 2022-2024. Our proposal advances the project to save FCPS time and money in delivery of its new middle school through an established team that has worked with the FCPS, City of Fredericksburg, and each on numerous PPEA projects. We believe it is important to advance the project for two primary reasons:

- To mitigate rising costs due to construction inflation and rising interest rates, and;
- To address modern learning environments and overcrowding



Construction cost inflation has been volatile over the past 12 months. Supply chain issues and shortages of skilled labor has impacted the construction industry. The PPEA approach will provide some flexibility in scheduling bid and work scope packages during the course of construction in order to better align the procurement of scope items with more favorable market conditions should those market conditions emerge.

2.E. ANY LOCAL, STATE, OR FEDERAL RESOURCES THAT THE PROPOSER CONTEMPLATES REQUESTING FOR THE PROJECT. DESCRIBE THE TOTAL COMMITMENT, IF ANY, EXPECTED FROM GOVERNMENTAL SOURCES AND THE TIMING OF ANY ANTICIPATED COMMITMENT. SUCH DISCLOSURE SHOULD INCLUDE ANY DIRECT OR INDIRECT GUARANTEES OR PLEDGES OF THE SCHOOL BOARD'S CREDIT OR REVENUE.

Please refer to our response in Project Financing 2.B.

2.F. THE AMOUNTS AND THE TERMS AND CONDITIONS FOR ANY REVENUE SOURCES

Please refer to our response in Project Financing 2.B.

2.G. ANY ASPECT OF THE PROJECT THAT COULD DISQUALIFY THE PROJECT FROM OBTAINING TAX-EXEMPT FINANCING

Not applicable.

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Project Benefit and Compatibility



3.A. WHO WILL BENEFIT FROM THE PROJECT, HOW THEY WILL BENEFIT, AND HOW THE PROJECT WILL BENEFIT THE OVERALL COMMUNITY, REGION, OR STATE

Please see Section 1.E. for a discussion of community benefits.

3.B. ANTICIPATED PUBLIC SUPPORT OR OPPOSITION, AS WELL AS ANY ANTICIPATED GOVERNMENT SUPPORT OR OPPOSITION, FOR THE PROJECT

Large, publicly-funded, capital projects almost always encounter opposition from some taxpayers who do not support the expenditure and who may not fully appreciate the need for the project. However, a decision by FCPS to construct this project would undoubtedly find support, as well.

3.C. STRATEGY AND PLANS TO INVOLVE AND INFORM THE GENERAL PUBLIC, BUSINESS COMMUNITY, AND GOVERNMENTAL AGENCIES IN AREAS AFFECTED BY THE PROJECT

Keeping the Fredericksburg City citizens, parents, and stakeholders informed about capital projects through effective communication is essential to the success of any public building project. Gaining community consensus is an integral part of the planning and design process. Nonetheless, experience has taught us that it is

unrealistic to assume that a school project will be 100 percent accepted by everyone at every step of the way.

Often the need for a new school, its cost, location, impact on neighbors, and other issues can be controversial and subject to criticism. Such criticism is often unjustified or based on inaccurate perceptions. It is wise to be prepared to deal with criticism head-on and create opportunities for open dialog so opposing views can be expressed and accurate information can be shared. Information must be documented and presented clearly, in a straightforward manner, and with sensitivity to a multitude of conflicting concerns and agendas.

Stephen Halsey, who will lead the planning and design effort for the project, has 30 years of experience with K-12 educational design projects. He understands the issues, has extensive experience in communicating with school boards, community leaders, citizens, and has often participated in public presentations and public input forums about proposed facilities.

First Choice will work closely with FCPS to provide information for and assist in preparation of appropriate communication tools to support discussion with local officials, citizens, representatives of local businesses, civic organizations, and governmental agencies and will

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assist, as needed, with presentations and meetings with those groups.

Additionally, the following procedures and techniques will be employed to keep project stakeholders up to date on project issues and information.

- **Written Documentation of Discussion and Decisions** — Project meetings and substantive telephone conversations will be summarized in writing, with copies distributed to participants. Decisions made at such meetings will be documented to confirm understanding. Parties responsible for resolving issues will be identified.
- **File Transfers** — Moseley Architects utilizes Newforma software, whereby large electronic files may be uploaded/downloaded for quick and easy exchange between members of First Choice and FCPS. The latest version of project documents are readily available to facilitate optimum coordination. Access is password protected for security.
- **Customized Construction Administration Software** — We will utilize a customized version of Meridian Prolog software to facilitate the construction administration process for the project. The web-based application is essentially a construction-oriented database, which will allow for password-protected access to important information related to the construction process. The First Choice team and FCPS can access this information to maximize effective communication. Reports on the status of critical aspects of the construction process (e.g., project contacts, status of submittals, “hot lists” of urgent issues) can be readily created and accessed to provide information necessary to deal with issues quickly and effectively as they occur, or simply to check on the status of a particular issue.



3.D. ANTICIPATED SIGNIFICANT BENEFITS TO THE COMMUNITY, REGION OR STATE, INCLUDING ANTICIPATED BENEFITS TO THE ECONOMIC CONDITION OF THE SCHOOL BOARD AND WHETHER THE PROJECT IS CRITICAL TO ATTRACTING OR MAINTAINING COMPETITIVE INDUSTRIES AND BUSINESSES TO THE SCHOOL BOARD, FREDERICKSBURG CITY, OR THE SURROUNDING REGION

FCPS’ desire for a new, modern middle school, a school rich in spaces that support collaboration, student exploration, and career and technical curriculum will provide tremendous benefits to families, communities, and businesses in the Fredericksburg area. The opening of a new and modern school facility demonstrates to the community a commitment on the part of FCPS to provide modern, state-of-the-art instructional environments for its teachers, students, and staff. Modern school facilities have been shown through numerous studies to improve student performance and teacher morale, both of which will result in this school community being attractive to families and businesses considering locating to Fredericksburg.

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3.E. COMPATIBILITY WITH THE LOCAL COMPREHENSIVE PLAN, LOCAL INFRASTRUCTURE DEVELOPMENT PLANS, THE CAPITAL IMPROVEMENTS BUDGET, OR OTHER GOVERNMENT SPENDING PLAN

Our proposal provides for design and construction of a new middle school. It is not an “economic development project” per se, although it generates a number of jobs during construction. The proposed project is neither compatible nor incompatible with local, regional and state economic development plans.

3.F. PARTICIPATION EFFORTS THAT ARE INTENDED TO BE UNDERTAKEN IN CONNECTION WITH THIS PROJECT WITH REGARD TO THE FOLLOWING TYPES OF BUSINESSES: (I) MINORITY-OWNED BUSINESSES, (II) WOMAN-OWNED BUSINESSES, AND (III) SMALL BUSINESSES.

The First Choice team is strongly committed to an effort to include small and minority owned businesses in the development and construction of this project. Our team has a record of achieving minority participation goals on our projects.

First Choice is committed to aligning its utilization of small, women-owned, and minority-owned (SWAM) businesses as subcontractors and vendors whenever feasible in all of its work for both public and private projects. Helping to support SWAM businesses is good for the construction industry by increasing the group of



talented contractors, in addition to providing essential social and economic diversity opportunities.

English Construction Company will implement a SWAM plan to identify and utilize (i) small businesses, (ii) women-owned businesses, and (iii) minority-owned businesses. This plan is successfully being utilized on numerous projects through the company. English Construction Company's efforts in implementing this plan are to attract prime, first tier, and second tier contractors, including minority business participants (most of the project team is already familiar with many local and SWAM contractors). In addition to the SWAM plan, First Choice will also strive to attract local businesses and further boost the city's economy.

The First Choice team will strongly encourage all qualified minority subcontractors to bid various trades.

Initiatives to reach SWAM contractors will include:

- advertising for all trades in the local newspapers in the City of Fredericksburg and surrounding areas, the Virginia Department of Minority Business Enterprise (DMBE) database;
- notifications through faxes, emails to SWAM firms;
- notifications in local plan rooms;
- sponsoring SWAM events, as appropriate.

These ads will encourage small, women-owned, and minority-owned businesses to participate.

English Construction will also assist interested SWAM firms in obtaining appropriate insurance coverage and bonding requirements. Should non-minority subcontractor be utilized, we will request that they assume part of the responsibility of meeting or exceeding contractual SWAM participation goals.

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