



Date: July 7, 2023

Subject: **Short-List and Interview Notice**  
Design-Build Team for Pollock Halls Renovations  
Penn State – University Park Campus  
Penn State Project No. 00-07386.00

To: Barton Malow Builders – Clark Nexsen/Hoffman Leakey Architects, LLC  
Clayco – Mackey Mitchell Architects/DLA+  
Whiting-Turner – EwingCole/Hanbury

Short-listed Design-Build Teams:

We would like to thank all the firms that submitted a proposal for the project. The Screening Committee met to determine the Short-List and selected the above three (3) teams who will be interviewed for the project at the Penn Stater Hotel and Conference Center in State College, PA on **July 27, 2023**. To the firms that were not selected, as always, these decisions are difficult. The interview schedule is as follows:

Team	Time	Location
Barton Malow Builders	8:30 AM – 10:00 AM	Penn Stater Room 105
Whiting-Turner	10:15 AM – 11:45 AM	Penn Stater Room 104
Clayco	12:30 PM – 2:00 PM	Penn Stater Room 104

The interview rooms will be available half an hour before the team’s assigned time and are equipped with a projection screen for the team’s use. Projector, access to the internet, and all other technology needs are the team’s responsibility. Teams shall correspond directly with The Penn Stater for assistance. Each team shall email the University Architect ([gak21@psu.edu](mailto:gak21@psu.edu)) an electronic copy of their interview presentation for Penn State’s internal use by 5pm EST (Eastern Standard Time) on July 25, 2023.

**Interview Format**

The interview format will be a 45-minute team presentation (including introductions), followed by a 40-minute question and answer session, and ending with a 5-minute team statement and/or closing thoughts.

Please limit the team’s attendance to a maximum of nine (9) people. Room arrangement needs to provide seating for eleven (11) selection committee members. We strongly prefer to meet with the key contacts for the project that will be working with us actively and regularly during the project and suggest that the team’s point-of-contact emcee the presentation. Executive-level representatives who will not actively and regularly participate in the project should not attend.

The team should clearly describe why they are the best team for the project, including explaining the team’s differentiators. As a part of the presentation, we request that you address the topics outlined below. Present this information in any arrangement, format, and topic duration that suits your team.

## Interview Topics

### 1. Team Structure

- Briefly introduce each team member present and their role in the project. Note any changes from the proposal.
- Review the overall team's organizational chart and briefly identify the role of each company. Note any changes from the proposal.
- Clearly state the team's concurrence with, without exception, the terms, conditions, and provisions as contained in our standard form of agreement.
  - Our standard design-build agreement is a modified ConsensusDocs 410 Standard Design-Build Agreement and General Conditions Between Owner and Design-Builder. NOTE: An updated version of this will be shared via email to each short-listed firm's selection phase point of contact.

### 2. Team Experience

- Demonstrate the team's unity by showing examples of your most relevant past work that was executed by the proposed team. Discuss why the project is relevant to the Pollock Halls project, how the team achieved success, and define who did what on the example project. Discuss why the work is germane to our project.
- Specifically discuss examples of relevant renovation work, noting typical and unique challenges and the resolutions to both.
- As a part of this, highlight some of the team's best university housing facilities and attributes to consider, when planning such a facility.

### 3. Project Approach

Present the team's best practices that lead to project success, including, but not limited to:

- Stakeholder engagement to determine project requirements and decision-making processes, including:
  - Define your process of creating actionable project goals/drivers. And once established, how will you help us measure options and ideas, including in comparison to the drivers/goals.
  - What you will need from Penn State, the importance of our role in the team's process, and how the client/ users are inextricably involved.
  - How the construction, architectural, and engineering teams will interact with each other and with project stakeholders at different project stages to make key decisions. Related: Identify any criteria and/or the approach to establishing priorities and making decisions.
  - Which team members will lead critical project efforts, tasks, phases. Specifically, who will lead the programming/design process and who will lead the construction process?

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- How much district-level planning would be involved in the process of this project? What is the process? Related: How have you identified the operational flow of goods and people in a complex facility like Pollock and how do you communicate and test it?
- Discuss if you have helped other owners define the “business case” of a project. Have you reviewed staffing needs for program choices, including evaluating the impact of location and adjacencies?
- Engineering approach:
  - How has this team reviewed buildings to determine the feasibility of modifying the structure to facilitate volumetric changes and additions or subtractions?
  - The team’s overall approach to any technical considerations, MEP or building system design, and achieving PSU’s high performance and sustainability standards.
  - How can the MEP scope (and related costs) be managed throughout the life of the project and project?
  - What is the process, and who is leading the planning and design efforts related to utilities for this project?

#### 4. Project Schedule/ Staffing

Describe the team’s approach to achieving the project schedule, including:

- The team’s overall impression of the schedule and phasing: Is it achievable? Are there any changes the team would suggest?
- Critical path items, milestones, risks, and schedule drivers.
- The team’s availability, especially considering other projects and team workload.
- How would the team leverage in-person sessions versus virtual meetings – and related interactive tools and similar technology - to their most significant benefit during the project’s programming, design, and construction phases?

#### 5. Cost Development

Describe the team’s cost development approach, including, but not limited to:

- Integrating cost estimating with option development to drive to actionable results. How will estimating and cost analysis be managed dynamically throughout the project?
- Managing unknowns inherent in renovation to allow for the development of numbers that can foster reliable planning.
- Understanding escalation and uncertainty of timing, relative to project implementation, for costs developed in the design phase. How can each project provide guidance in the subsequent projects?
- Consideration of life cycle costs. What is appropriate and achievable during the design phase?

## 6. Campus Drivers

- Discuss the site, including existing conditions and context, building siting/massing, sustainability, and ways to best connect the site to the overall campus.
  - Discuss site approach/entry options and the design impact of new or modified campus connections.
  - How can Pollock Halls be made unique while still being an integrated part of the University Park campus?
- How will the team work the site during construction? What key strategies would you employ while working in an active campus community?

## 7. Project-Specific Considerations, Program, and Project Goals

- Share the team's impression of the provided project information. What do we have right and what do we have wrong?
- What new and emerging trends in the programming and/or design of university housing should be considered for this project? What innovation would the team bring to Pollock Halls that might be new to Penn State?
- Many of the building's requirements involve competing interests, such as different program types. How will the team navigate these competing interests? Related: Identify any likely competing priorities and possible ways to address these issues in the project process.
- Describe how the team will explore different design and building planning ideas that will "test" various building-specific and/or district-wide options?
- What key features can help make Pollock a unique/distinctive community and district? How can these community-defining features be balanced with the need for highly efficient residence halls (from a bed count perspective)?

## **RESPONSE CONDITIONS**

- Participation in this selection process by submitting teams is voluntary and shall be at no cost or obligation to Penn State.
- Penn State does not obligate itself to make the selection for these Design-Build Services based on lowest cost and reserves the right to reject all responses and to hold proposals for a minimum of forty-five days. Penn State further reserves the right to waive any irregularity in any or all responses, and to reject or accept any response or portion thereof. Our intent is to identify the team that provides the best fit with our perceived need. This team will balance experience, service, quality, and cost.
- News releases pertaining to this project will not be made without prior approval from Penn State, and then only in coordination with Penn State. The contents of all selection process correspondence and material are to remain confidential, and as such, not be made public.

- After selection, the Penn State Facility Project Leader will be Penn State's point-of-contact for the Design-Build Contractor for all matters related to the project and is the only person authorized to provide direction to the Design-Build Contractor.
- The Design-Build Contractor is responsible for making all parking arrangements. Penn State is not responsible for any citations or parking violations incurred by the Design-Build Contractor.
- If it becomes necessary to revise any part of this notice an amendment will be posted on the selection website.

**We are providing the following documents to help with the team's preparation for these interviews:**

- **Sample Interview Room layout**
- **Non-Binding Design-Build Contractor Fee Form**. Complete and email to Greg Kufner at [gak21@psu.edu](mailto:gak21@psu.edu) by noon EST on July 26, 2023.
- **Our standard design-build agreement is a modified ConsensusDocs 410 Standard Design-Build Agreement and General Conditions Between Owner and Design-Builder. NOTE: An updated version of this will be shared via email to each short-listed firm's selection phase point of contact.**
- **Reminder: Each team shall email the University Architect ([gak21@psu.edu](mailto:gak21@psu.edu)) an electronic copy of their interview presentation for Penn State's internal use by 5pm EST (Eastern Standard Time) on July 25, 2023.**

The result of the interviews will be published on the PSU OPP website shortly after the interviews. Questions shall be submitted to us in writing via email, our addresses are listed below.

Thank you for your participation in this process. We look forward to meeting you at the interviews.

Kindest Regards,

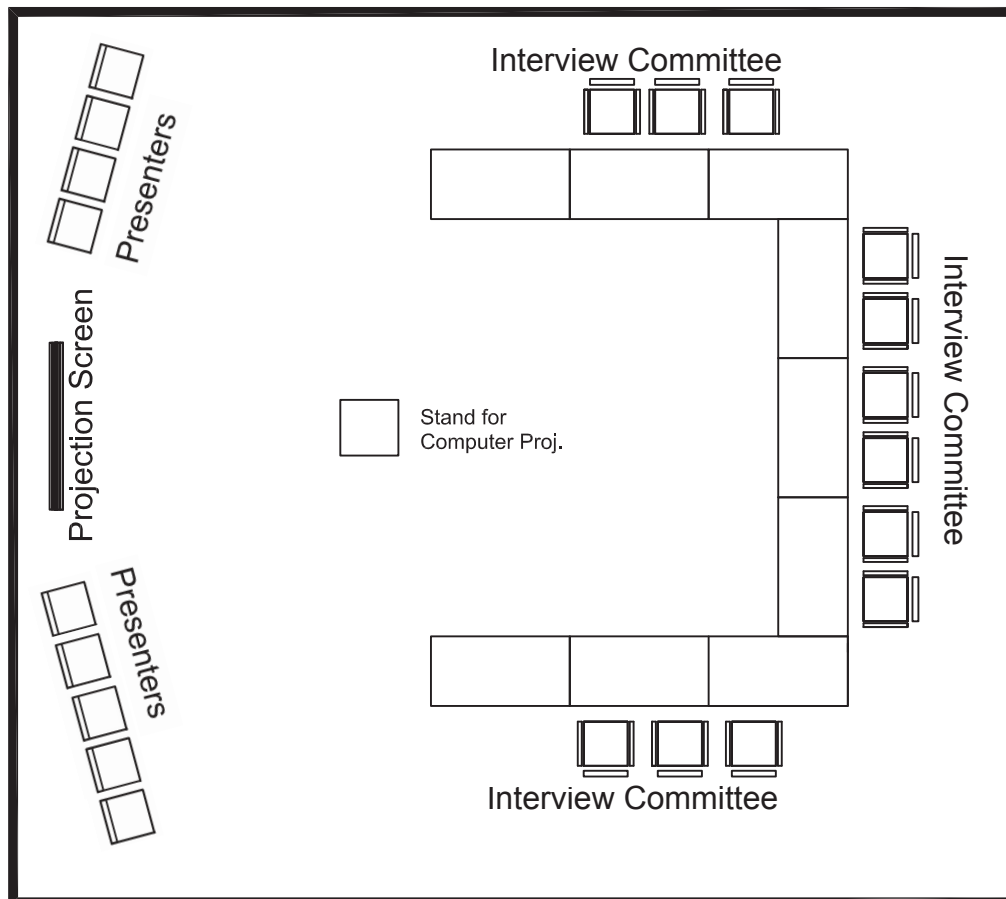


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CC: Screening Committee

# Penn State D-B Team Selection Example Interview Room Layout



## Attachment A: Non-Binding Design-Build Cost Proposal

Pollock Halls Renovations – Design-Build

Project No. 00-07386.00

D-B Firm Name: \_\_\_\_\_

The estimated Guaranteed Maximum Price (GMP) of this project is approximately \$308M (total project budget = \$338.2M). Base your cost proposals on the above-stated GMP value.

### Summary of D-B Cost Proposal:

1. Design Services ..... \$ \_\_\_\_\_
  - a. Provide a listing of design services you will provide for the fee above. This fee shall incorporate all costs prior to the start of construction.
  
2. Pre-construction CM Services ..... \$ \_\_\_\_\_
  - a. Provide a listing of pre-construction services your construction management (CM) team will provide for the fee above and be specific on how your fee applies to each service.
  
3. D-B staff costs ..... \$ \_\_\_\_\_
  - a. Provide a listing of Design and CM services you will provide for the fee above and be specific on how your fee applies to each service. This fee shall incorporate all costs during construction through final completion.
  
4. D-B Fee (if proposing a fee in addition to costs above)
 

\_\_\_\_\_ % ..... \$ \_\_\_\_\_

  - a. Fee % shall be in accordance with ARTICLE 6 of the Design-Build Agreement.
  
5. D-B Insurance cost (provide a listing of required insurances)
 

\_\_\_\_\_ % ..... \$ \_\_\_\_\_
  
6. Please provide an hourly Billable rate schedule for your staff, including off-site and home office staff typically used to serve your projects. This schedule shall summarize total hours for design, pre-construction, and construction staff.

**TOTAL D-B Costs (totals from above)** \$ \_\_\_\_\_