



Investment Grade Audit / Design-Build Preliminary Services Proposal

January 12, 2023

Wes Corzine
Superintendent
Huckabay Independent School District

200 County Road 421
Stephenville, Texas 76401

RE: Former Agricultural Space Transition to New Classrooms Project

Superintendent Corzine,

On behalf of McKinstry Essention, LLC (McKinstry), we are pleased to submit this IGA-DB Services proposal. Our team is excited to partner with Huckabay Independent School District (HISD) to develop and construct the former Agricultural Facility into new/additional Jr. High Classroom space which fulfills the districts need for new efficient space both from a learning and energy efficiency perspective. It is our hope that is the first step in developing a beneficial partnership with the district to improve the operational efficiency of all HISD facilities.

The scope of work for this proposal aligns with the standard Design Build Institute of America's Standard Form of Preliminary Agreement Between Owner and Design-Builder, Document 520. The following are the pertinent scopes of work to be performed by McKinstry.

PHASE 1: PRELIMINARY SERVICES: McKinstry will assist the owner with solidifying the Owner's Project Criteria (OPC) describing the owner's program requirements and objectives for the project. In addition to being the mission of the project, the OPC will spell out the project location, use, price, time, performance, and expandability requirements to guide our work moving forward. In this step we will evaluate options for programming, types of systems, electrical interconnection requirements, financial metrics, concept sketches, and basic design and performance specifications.

Together, we will define the parameters and objectives of the program, including the following tasks:

1. Define and document Huckabay ISD's goals and objectives, including:
 - a. Project purpose; facility efficiency goals, marketing/public relations, desired outcomes, and any other project specific goal.



- b. Financial criteria; available funding sources, desired procurement options, ownership and operation models, payback/ROI goals, fiscal deadlines and project financing options and preferences.
 - c. Construction related criteria; project timeframes, procurement requirements, subcontractor preferences and vendor/product review, use of contingency and other special requirements.
2. Data collection, site visits, and analysis; Gather information including utility data history, contract documents, drawings and specifications for existing infrastructure, and facility usage statistics. Define facility design objectives, perform utility data analysis to determine potential financial impacts/payback. Perform site visits and decide on specific design requirements for potential project opportunities.
3. Determine high-level project specifications for progression into Schematic Design phase and deliver report of findings and recommendations for approval.

PHASE 2: SCHEMATIC DESIGNS: Based on the approved OPC, McKinstry will move into the Schematic Design (30% set) phase. McKinstry and HISD will have determined which project elements are most feasible and will develop project concepts and specific financial return estimates based on our Utility Data Analysis. These schematic designs will be reviewed with the HISD team to determine which to move forward with into design-build proposal(s).

The Schematic Design phase will include the following tasks:

1. Produce drawings, diagrams and specifications setting forth the requirements of the projects, based on OPC and any updated information
2. Develop Total Cost of Ownership (TCO) models for selected project(s) and update financial models, as necessary.
3. Present to key HISD stakeholders and decision makers for approval to move into Design-Build Proposal.

PHASE 3: DESIGN-BUILD PROPOSAL DELIVERY: Based on the Schematic Designs, McKinstry will deliver a proposal to move forward into detailed engineering and construction for selected project(s). We anticipate delivering proposal to transition and or reconstruct the former Agricultural facility into newly and efficiently designed Jr. High classroom space. McKinstry also has offerings that include energy management software and full zero-carbon facility planning services. That can be included at this phase upon request.

The Design-Build Proposals will include the following:

1. Proposed contract price for the design and construction of each project in the form of a lump sum, or the cost of the work plus a fee with an option for a Guaranteed Maximum Price ("GMP").
2. Schedule and date of Substantial Completion of the Project upon which the Contract Price for the Project is based.
3. Any other information necessary for HISD to enter into the construction contract with McKinstry.



McKinstry will meet with HISD to review the proposal(s) and discuss any desired modifications, and the scope of work under this proposal will be deemed complete upon meeting with HISD to discuss the design-build proposals and revising the proposals if needed.

COST: The cost for the scope of work outlines in this proposal is as follows.

Phase 1: Preliminary Services	\$0.00
Phase 2: Schematic Design	\$60,572.50
Phase 3: Design-Build Proposal	\$TBD
Total Cost:	\$TBD

TIMELINE: We anticipate the Preliminary Services phase to last approximately 60 days, followed by the Schematic Design phase that will last another approximately 60 days. Once the desired schematic designs are approved by HISD, McKinstry can deliver design-build proposals within approximately 30 days, and can move into the detailed engineering, equipment procurement, and construction activities immediately upon notice to proceed.

- HISD reviews and accepts McKinstry Proposal: **1/30/23 (anticipated)**
- Preliminary Services performed and Owner's Project Criteria report delivered: **2/28/23**
- Schematic Designs delivered to HISD: **3/30/23**
- Design-Build Proposals developed and delivered to HISD: **4/28/23**
- HISD reviews Design-Build Proposals
- Notice to Proceed given by HISD: **TBD**
- Engineering, Design, Procurement by McKinstry Begin: **TBD**

We thank you for this opportunity and are dedicated to assisting Huckabay Independent School District with a successful delivery of this project.

Sincerely,

Craig Hawkesworth, MBA | Sr. Market Development Manager
972.567.3643 | craighaw@mckinstry.com