



# Hale Makua

by oph

**REQUEST FOR PROPOSAL  
DESIGN SERVICES  
RFP # HALE MAKUA-2023**

**Prepared by:**  
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## GENERAL PROVISIONS, TERMS AND CONDITIONS

**Introduction:** The Hale Makua Health Services (“HM”) is requesting a proposal (“Proposal”) from firms (“Respondents”) interested in providing design services (“Design Services”) as described in the scope of services attached hereto as Exhibit A (“Project”). The intent for this engagement includes selection, commitment, and negotiations with Respondent to enter into a contract using AIA Document B101 - 2017 Standard Form of Agreement Between Owner and Architect. This shall also include AIA Document A202 – 2017 General Conditions of the Contract for Construction.

**Submittal Requirements:** For submission purposes, the Proposal shall be addressed to Wesley Lo at Hale Makua Health Services and delivered per the following instructions.

Individuals or firms shall email a PDF file of their response to the RFP.  
Files may be no larger than 10MB.

PDF attachments shall be named:  
“PROPOSAL HALE MAKUA: KAHULUI REHAB FACILITY DESIGN SERVICES”.

The subject line of the email shall be the same as the PDF file name to ensure that responses from all interested individuals or firms are grouped together when retrieving the emails.

The PDF file shall be e-mailed to the Owner’s Consultant:

**The Wilhelm Group LLC**  
Matt Castro  
Project Manager  
[mcastro@twghawaii.com](mailto:mcastro@twghawaii.com)

The PDF file(s) must be received by **2:00 p.m., Hawaii Standard Time**, on **July 27, 2023** which shall be based on the email date/time of the PDF file transmission.

**Questions and Inquires:** Any questions, interpretations, or clarifications, either administrative or technical about this RFP must be requested in writing. HM will provide copies of all written questions and HM responses to all Respondents. The deadline for submission of written questions is July 20, 2023. Please direct all your questions and inquiries to The Wilhelm Group (TWG) Attention: Mr. Matt Castro via email address [mcastro@twghawaii.com](mailto:mcastro@twghawaii.com).

**Proposal Addenda:** HM may modify this RFP, any of its key actions, dates, or any of its attachments, prior to the date fixed for submission of Proposals by issuance of an addendum to all Respondents.

**Errors, Omissions and Exceptions:** If a Respondent discovers any ambiguity, conflict, discrepancy, omission, or other error in the RFP, it immediately shall notify HM of such error in writing and request a modification or clarification. Modifications will be made by addendum. Clarification will be given by written notice to all Respondents. Interpretation of this RFP shall be the responsibility of HM, and that interpretation shall be final. HM reserves the right to remedy any error contained in this RFP.

If a Respondent fails to notify HM prior to the time and date fixed for submission of Proposals of an error in the RFP known to it, or that reasonably should have been known to it, it shall submit a Proposal at its own risk. If Respondent is awarded the Design Services, it shall not be entitled to additional compensation or time extension by reason of the error or its later correction.

If a Respondent takes exception to any part of this RFP, or any addenda subsequently issued, it must do so in writing. All exceptions must be submitted with the Proposal. Failure to do so will be construed as Respondent's acceptance of all terms of this RFP.

**Withdrawal, Cancellation or Rejection:** Respondent may withdraw a Proposal after its submission by written request, signed by the authorized representative of the firm, prior to the time and date specified for submission. Proposals may be withdrawn and resubmitted if done so before the submission deadline. Withdrawal or modification offered in any other manner will not be considered.

HM retains the right to cancel this RFP at any time. No obligation, either expressed or implied, exists on the part of HM to make an award or to pay any costs incurred in the preparation or submission of a Proposal. Proposals, and any other supporting materials submitted to HM, will not be returned, and will become the property of HM. HM reserves the right to make use of any information or ideas contained within a Proposal unless portions of the Proposal are designated proprietary at the time of submittal and are requested to be returned.

HM may reject any or all Proposals and may waive any immaterial deviation in a Proposal. HM's waiver of an immaterial defect shall in no way modify the RFP documents or excuse the Respondent from full compliance with the specifications if Respondent is awarded the Design Services. Proposals referring to terms and conditions other than HM's terms and conditions may be rejected as being non-responsive.

HM may make investigations as deemed necessary to determine the ability of the Respondent to perform the Design Services, and, if requested by HM, the Respondent shall furnish HM all such information and data for this purpose. HM reserves the right to reject any Proposal if the evidence submitted by, or investigation of, such Respondent fails to satisfy HM that such Respondent is properly qualified to carry out the obligations of the Agreement and to complete the Design Services as specified.

**Reference Documents:** The bidding documents, including any plans, specifications, or other reference documents, are furnished for bidding purposes only and are not to be used for any other purpose whatsoever. They may not be reproduced without prior written permission from HM, or any other preparer of the documents. All bidding documents must be promptly returned upon demand.

The bidding documents can be downloaded from the following site.

<https://www.dropbox.com/sh/ox9ut4yx3uak4p0/AACqIxyQzTNKwb8o2jVXFeMaa?dl=0>

**Award:** All qualified Proposals will be evaluated, and an award made to the Respondent whose Proposal best complies with all of the requirements of the RFP and is deemed to be in the best interest of HM, which may not be the lowest bid. In order to qualify, all Proposals must include any proposed changes to the Agreement. Respondent's failure to either accept the terms and conditions of the Agreement or to include Respondent's proposed changes to same will result in disqualification of the Proposal.

Any award made is subject to a signed Agreement. HM reserves the right to withdraw the award at any time for any reason during the contract negotiation process. The successful Respondent must work

diligently with HM to execute and deliver a signed Agreement within two (2) weeks of the award. The Agreement is not effective until fully executed by HM and a fully executed Agreement is delivered to Respondent. The Design Services shall not be performed prior to receipt of a fully executed Agreement. In the event the successful Respondent does not execute the Agreement as required, the award of the Design Services may then be made to another Respondent or CPB may decide to call for new Proposals.

**Confidentiality:** If a Proposal is accepted, the Respondent shall not issue any news releases or other statements pertaining to the award or the Agreement which state or imply HM's endorsement of Respondent's services.

## PURPOSE AND OBJECTIVE

**Background:** Since 1946, Hale Makua Health Services has provided healthcare programs filled with compassion, dignity, and respect to meet the ever-changing needs of Maui's community.

Hale Makua is devoted to helping Maui's Elders live their best lives. Hale Makua believes in helping Maui's frail elderly and disabled individuals live vibrant, fulfilling lives in its homes and within the community. Hale Makua offers compassionate, personalized health services that encourage both independence and well-being.

**Purpose:** Hale Makua Health Services seeks the services of qualified firms to provide concept design services for both expansion and consolidation of various operations at Hale Makua Health Services. These services are anticipated to be immediately required.

**Work Completed to Date:** Prior to the RFP, the following pre-development activities have already been completed by HM and/or its consultants. The Respondent shall continue efforts to refine concepts to allow HM the opportunity to select a final option for which a full design shall be completed.

1. Determination of project parameters (branch size, components of site use, existing tenants, etc.)
2. Identify & evaluate various use options in addition to a rehab facility
  - a. In-line retail/restaurant
  - b. single story building with nursing services
  - c. single story building with multipurpose spaces
  - d. single story building with residential
3. Development of strategy to address potential for retail component and cost implications to address possible Board inquiries regarding the potential to develop
4. Review HM's requirements to facilitate further discussions with HM and Planning Architect
5. Engagement of a Planning Architect to perform preliminary concept feasibility review and proposed design options based on reviews
6. Review and comments for each concept drawings to select two options to include in RFP

## COST ESTIMATES:

HM has budgeted \$32,000,000 for construction costs. The Respondent, shall coordinate to provide updated budgetary cost estimates following each phase of the design process. The Respondent shall endeavor to design a project that is consistent with HM’s quality, brand standard, and budgetary expectations.

## SCHEDULES:

### RFP Schedule:

1	Release RFP	June 22, 2023
2	Site Visit	July 06, 2023 @ 9:00am
3	Last Date to Submit Question	July 20, 2023
4	Submit Proposals	July 27, 2023
5	Notification of Request for Interview	July 31, 2023
6	Date for Scheduled Interview (approximate date)	Week of August 7
7	Notification of Selected Firm (approximate date)	August 14, 2023
8	Execute Contract for Design Services (approximate date)	SEPTEMBER 2023
9	Start of Services (approximate date)	SEPTEMBER 2023

**Project Pre-Construction Timeline:** Hale Makua Health Services anticipates providing Notice to Proceed to the selected Respondent on or around April of 2023. The Respondent is expected to coordinate design activities and permit approvals with HM and selected General Contractor (“GC”) to allow for start of construction activities on or before June of 2024.

**Project Construction Timeline:** Hale Makua health Services anticipates providing Notice to Proceed to the selected General Contractor (“GC”) on or around June of 2024. The Respondent is expected to coordinate design activities and permit approvals with HM and selected GC to allow for overall project completion on or before September of 2025.

## PROPOSAL INSTRUCTIONS AND FORMAT

To be considered responsive to this RFP, Respondent must submit Proposals in the format identified in this section. All requirements and questions in the RFP must be addressed and all requested data must be supplied. HM reserves the right to request additional information that in HM's opinion is necessary to assure that the Respondent's competence, number of qualified employees, business organization and financial resources are adequate to perform according to the Agreement. The Proposal must address all requirements of the RFP even if a "no response" is appropriate.

**Preparation:** Proposals should be prepared in such a way as to provide a straightforward, concise delineation of Respondent's capabilities to satisfy the requirements of this RFP. Emphasis should be concentrated on the completeness and clarity of the content. Proposals shall adhere to the following format for organization and content and must be divided into the individual sections listed below, including the requested information in the Proposal.

**1. Cover Letter:** The cover letter shall include a brief general statement of intent to perform the Design Services and confirm that all elements of the RFP have been reviewed and understood. The cover letter should include a brief summary of Respondent's qualifications and Respondent's willingness to enter into a contract under the terms and conditions prescribed by HM. The cover letter should be signed by an individual who can bind the Respondent contractually.

**2. Table of Contents:** The table of contents shall identify the contents of the Proposal in a format consistent with the Proposal Content set forth below.

**3. Qualifications / Experience:** Provide information related to Respondent's experience and capability to perform the Design Services for this Project.

**4. Personnel:** Respondent shall identify all of its employees who may be assigned to the Project as shown in Exhibit B. It is the Respondent's responsibility to determine and identify the number of working staff necessary to meet the requirements of the Project. HM reserves the right to review and mutually agree upon the number of staff proposed by Respondent to complete the Design Services. Respondent should demonstrate that all key personnel have been successfully involved with projects of similar scope and magnitude and meet the requirements listed in this RFP.

Respondent shall identify and assign a single point of contact (the "Design Manager") for all correspondence and notifications about the Proposal. The Design Manager will have the overall responsibility for the performance of the services and will be able to promptly resolve any questions or problems that arise during all phases of the Project.

**5. Methodology/Work Plan:** Respondent shall prepare a work plan describing how all the required tasks will be completed and the methodology to be used with relevant examples from prior projects as necessary.

**6. Fee Breakdown:** The Proposal shall include a contract breakdown, as described in Attachment B, and including the following: (1) a not-to-exceed fee proposal to perform all tasks

described in this RFP; (2) any other applicable costs, including reimbursables; (3) all subconsultant costs; and (4) any and all exclusions.

**7. Project Schedule:** Based on the approximate start and completion dates set forth above, Respondent should provide a project schedule, as described in Exhibit E, in bar chart format, which illustrates proposed timing for each phase of the services, proposed milestone dates and a completion date for the services.

**8. Subconsultants:** Provide a list of proposed subconsultants, as described in Exhibit F.

**9. References:** Provide a list of professional references.

**10. Exceptions:** Any and all exceptions to the RFP must be listed on an item-by-item basis and cross-referenced with the RFP document. If there are no exceptions, Respondent must expressly state that no exceptions are taken.

**11. Contact Information:** Name of person that HM should contact about the Proposal.



## EVALUATION AND AWARD CRITERIA

**Evaluation Method:** All Proposals shall be reviewed to verify that the Respondent has met the minimum requirements. Proposals that have not complied with requirements, do not meet minimum content and quality standards, or take unacceptable exceptions to the Agreement will be eliminated from further consideration. All qualified Proposals will be reviewed and evaluated by HM's evaluation committee. Award will be made to the Respondent whose Proposal is deemed to be in the best interest of HM and may not be the lowest bid. Respondent's specialized knowledge, expertise, experience, customer references, and cost proposal will be used to judge the Proposal. Respondents who are finalists will be notified as promptly as possible.

**Evaluation Criteria:** Evaluation and award of the Design Services will be based on factors other than cost. These factors may include:

- Qualifications and Experience
- Proposed Team Individual Experience
- Approach and Methodology
- Schedule
- Cost
- Professional references

At HM's discretion, to further assist in evaluation, some, one, or all of the Respondents may be requested to participate in an interview process. The interview will be used as another opportunity to clarify any issues within a given Proposal and explore the approaches that may be used to satisfy all requirements for HM. Notice of confirmation of the interview date/time will be given by email.

The following Sample form will be used to evaluate each respective proposal in response to the RFP. Each proposal will be rated utilizing the evaluation form and a total score will be determined. Hale Makua will then select the firms that have an acceptable score that will be invited to the next step of the RFP process, the firm interview.

During the interview, each respective firm will have an opportunity to present on their behalf the potential benefits provided by engaging their firm. If a firm is selected, a schedule interview will be coordinated by the Construction Manager and may be help in person or via zoom.

**EVALUATION FORM**

**Hale Makua Rehab Facility  
Request For Proposal, Design Services**

**Bidder #1**

Evaluation Factor	Avail. Points	Input	Notes
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**Qualifications / Experience (10 pts)**

1. Objective and Deliverables as Outlined in RFP	5		
2. Qualifications	3		
3. Bonus	2		
<b>Total</b>	<b>10</b>	<b>0</b>	

**Proposed Team Individual Experience (10 pts)**

1. Professional and educational qualifications of personnel that will be assigned to the Project	5		
2. Subconsultants	3		
3. Bonus (Other)	2		
<b>Total</b>	<b>10</b>	<b>0</b>	

**Approach and Methodology (20 pts)**

1. Projects of similare size & scope	4		
2. Demonstrated ability to provide designs within a target budget	4		
3. Demonstrated ability to perform consistently in a dynamic environment, with attention to detail	4		
4. Interview content and preparedness	4		
5. Bonus (other)	4		
<b>Total</b>	<b>20</b>	<b>0</b>	

**Schedule (25 pts)**

1. Proposed Schedule (most in favor of Owner)	15		
2. Anticipated workload and ability to service this project	5		
3. Bonus (other)	5		
<b>Total</b>	<b>25</b>	<b>0</b>	

**Cost (35 pts)**

1. Fee Proposal pricing (most in favor of Owner)	20		
2. Inclusions / Exclusions	10		
3. Bonus (Other)	5		
<b>Total</b>	<b>35</b>	<b>0</b>	

<b>Total -- All Evaluation Points</b>	<b>100</b>	<b>0</b>	
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## Exhibit A: Scope of Services

Hale Makua will accept bids for design of its new Kahului Rehab Facility project according to including, but not limited, the following services and phases:

### **GENERAL**

The Respondent shall assemble a design team to develop a new Rehab Facility and all tenant spaces at the newly acquired property in Kahului. The design team shall include all consultants necessary to complete a design in compliance with all applicable codes or requirements. This shall also include coordination of scopes by Owner Vendors, including but not limited to Audio-Visual, Information Technology, Security, Low Voltage Wiring, FF&E, Artwork, Signage, Photo-Voltaic vendors, or incoming Tenants. (Note: CPB reserves the right to refuse/reselect any members of the design team.)

### **CONCEPT DESIGN**

The Respondent shall further develop the initial concept designs included with this RFP. The Respondent shall deliver a Concept Design package for each option, including site plan, building layout, elevations, and renderings needed for HM to select the preferred option.

### **SCHEMATIC DESIGN (100% SD)**

After approval and acceptance of the previous deliverable by HM, the Respondent will work to define plans for civil, landscape, building plans & elevations, material selections, structural, mechanical, plumbing, electrical / control systems for design development. The Respondent shall provide color boards and renderings of designs as needed to secure owner approvals.

#### **Bidding for Design-Assist GC**

It is the preference of HM to procure a design assist contractor for provision of cost validation, value engineering, and/or input on constructability. In such case, the Respondent shall assist HM and Construction Manager (CM) in bidding the project to prospective design assist contractors and include coordination efforts in the scope and schedule accordingly.

### **DESIGN DEVELOPMENT (100% DDs)**

After approval and acceptance of the previous deliverable by HM, the Respondent will work to create detailed plans for civil, landscape, building plans & elevations, material selections, structural, mechanical, plumbing, electrical / control systems for final design. Several revisions of the plan may be needed as the project is developed during this planning stage. The Respondent will then prepare a final design plan based on the input received from HM and any applicable governmental agencies responsible for project approvals.

### **PERMIT SET & RESPONSES (50% CDs)**

After approval and acceptance of the previous deliverable by HM, as well as the appropriate municipal commissions and other governing bodies, the Respondent will create detailed construction and specification documents for permit submittal(s). The Respondent is responsible for the procurement of ALL plan approvals from the local municipals, Department of Planning & Permitting, and any other Authorities Having Jurisdiction. If HM desires the use of a 3rd Party Plans Reviewer and Permit Expediter, HM may elect to engage with a firm of their choosing directly.

### **CONSTRUCTION DOCUMENTS (100% CDs)**

After approval and acceptance of the previous deliverable by HM, as well as the appropriate municipal commissions and other governing bodies, the Respondent will create detailed construction and specification documents for final bidding/contracting purposes.

The final construction documents shall include as a minimum: Site Plan, Storm Water Management Plan, Drainage & Utility Plans, Landscaping Plan, Floor Plans, Roof Plan, Exterior Elevations, Building Sections, Foundation Plan, Framing Plans, Details & Sections, Door / Window / Room Finish / Mechanical / Plumbing / Electrical schedules, HVAC Plans, Electrical Plans, Plumbing Isometrics, and a Project Manual including specifications in CSI division format.

### **CONSTRUCTION ADMINISTRATION AND CLOSE-OUT**

The Respondent shall be a representative of and shall advise and consult with HM during construction until the final payment to prime contractors is due and during the correction period described in the Contract Documents.

Construction Related Services - The Respondent will provide on HM's behalf construction administration and inspection services. At a minimum, services to be provided consist of coordinating regular progress meetings, review of shop drawings, assist HM in floor and finish material selection, undertake construction observation, process certificates for payment to prime contractors, and facilitate preparation of final record drawings, warranty follow-up and project closeout.

## Exhibit B: Respondent's Personnel

RFP Reference Number: HALE MAKUA-2023

Respondent: \_\_\_\_\_

### Respondents Personnel

Respondent shall provide a list of personnel assigned, or to be assigned, to the Project and their level of authority and hourly rate.

# Exhibit C: Fee Breakdown

RFP Reference Number: HALE MAKUA -2023

Respondent: \_\_\_\_\_

## Fee Breakdown

Respondents shall submit complete copies of this Fee Breakdown for with its Proposal. It is imperative that Respondents submit their Fee Breakdown on this form and attached Schedule of Rates in this particular format, with all blanks filled in. The total cost shown at the end of this form shall equal the total Proposal price, inclusive of bond and builder’s risk insurance premium.

- 1. Concept Design Refinement for Selection
  - a. Evaluation and Development of Concept Design \$ \_\_\_\_\_
  
- 2. Pre-Construction
  - a. Schematic Design \$ \_\_\_\_\_
  - b. Design Development \$ \_\_\_\_\_
  - c. Permit Set & Responses \$ \_\_\_\_\_
  - d. Construction Documents \$ \_\_\_\_\_
  - SUBTOTAL, ARCHITECTURAL FEES \$ \_\_\_\_\_
  
- 3. Construction
  - a. CA Services \$ \_\_\_\_\_
  
- 4. Subconsultants
  - a. Structural Engineering \$ \_\_\_\_\_
  - b. Mechanical Engineering \$ \_\_\_\_\_
  - c. Electrical Engineering \$ \_\_\_\_\_
  - d. Plumbing Engineering \$ \_\_\_\_\_
  - e. Life Safety \$ \_\_\_\_\_
  - f. Civil Engineering \$ \_\_\_\_\_
  - g. Landscape Architecture \$ \_\_\_\_\_
  - h. Signage Consultant \$ \_\_\_\_\_
  - i. Geotech \$ \_\_\_\_\_
  - j. Topographical Survey \$ \_\_\_\_\_
  - k. Cost Estimating \$ \_\_\_\_\_
  - l. Other Consultants \$ \_\_\_\_\_
  
- TOTAL** \$ \_\_\_\_\_

# Exhibit D: Proposed Subconsultants

RFP Reference Number: HALE MAKUA -2023

Respondent: \_\_\_\_\_

The Respondent shall submit a list of all subconsultants being proposed for Project, including:

- a. Structural Engineering \_\_\_\_\_
- b. Mechanical Engineering \_\_\_\_\_
- c. Electrical Engineering \_\_\_\_\_
- d. Plumbing Engineering \_\_\_\_\_
- e. Life Safety \_\_\_\_\_
- f. Civil Engineering \_\_\_\_\_
- g. Landscape Architecture \_\_\_\_\_
- h. Signage Consultant \_\_\_\_\_
- i. Geotech \_\_\_\_\_
- j. Topographic Survey \_\_\_\_\_
- j. Other Consultants \_\_\_\_\_

## Exhibit E: Project Schedule

RFP Reference Number: HALE MAKUA -2023

Respondent: \_\_\_\_\_

### Project Schedule

The Respondent shall submit with its Proposal a project schedule, in bar chart format, which illustrates the proposed timing for each phase of the services, proposed milestone dates and a completion date for the services.