

**<Owner>**

**REQUEST FOR QUALIFICATIONS or  
REQUEST FOR PROPOSALS**

**FOR**

**CONSTRUCTION MANAGEMENT  
FOR**

**<INSERT PROJECT>**

**Submissions Due by <insert time> local time on <insert date>**

**<owner>**

**<address>**

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**REQUEST FOR PROPOSAL  
FOR  
CONSTRUCTION MANAGEMENT <INSERT DELIVERY> SERVICES  
FOR  
<INSERT PROJECT>  
<OWNER>  
<INSERT RELEASE DATE>**

**1. Introduction.**

<owner> is seeking proposals for qualified firms to provide comprehensive construction management <delivery method> services as outlined in Exhibit A Scope of Services in conjunction with the project(s) identified in Article 1.1.1.

**1.1. Overview:**

**1.1.1. Project(s) Type(s).** The project is a <new> <project> to be constructed on a <size> parcel at <address or cross streets> in <city, state>. The project will include approximately <number> buildings totaling approximately <number, if available> square feet, including <administration, classrooms, multipurpose/locker, mechanical, etc> spaces. The <project> is being designed and will be constructed to meet <LEED <insert level> or CHPS <insert score>>.

The selected architect(s) for the project is <name of firm> of <city, state>. The project is in the <insert design phase> design phase and the land is currently in review with the Dept. of Toxic Substances. (Example sentence)

**1.1.2. Proposed Project Schedule(s).** The anticipated schedule for the project(s) is as follows:

Project	Preconstruction/ CM Services start	Construction start	Project completion
<project>	<date>	<date>	<date>
<project>	<date>	<date>	<date>
<project>	<date>	<date>	<date>
<project>	<date>	<date>	<date>

**1.1.3. Project Costs.** The estimated <project/construction> costs for <project(s) name(s)> is \$<amount>, which includes <does/does not> include district soft costs.

**1.1.4. Funding Source.** A local general obligation bond was passed in <month, year> and provides the district's 50% portion of new construction funds. The district is dependent on the receipt of 50% funding from the State Facilities Program growth match. (Example sentence)

**1.1.5. Delivery Method.** The district desires the successful CM firm to provide multiple prime construction management services in cooperation with the district and architect.

Data Field	Multiple Prime	Agency	At-Risk
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a. Relationship of the Parties

Agency Construction Management – The Construction Manager shall be hired under a professional services agreement for a specified fee. The Construction Manager shall not hold a financial interest in any of the construction contracts. The CM shall serve as professional advisor to the District and shall assist in the management of design firms, other consultants and the general contractor or CM hired to manage trade contracts. The CM shall not hold contractual responsibility for the physical construction of the project.

The Multiple Prime Construction Manager shall be hired, by the District, under a professional services agreement which includes general conditions and a fee. The project shall be bid out in Individual trade bid packages for trade contractors and not a single general contractor. The Construction Manager shall prepare bid package summaries for all trades and the coordination of all of the bid packages required to build the project. The Construction Manager shall manage the contracts of each trade. The Construction Manager shall perform the services of an on-site Construction Manager during construction by providing scheduling, supervision, change order negotiations, and other activities required to build the project.

Construction Management At Risk – The Construction Manager shall be hired, by the District, under a professional services agreement which includes general conditions and a fee. The project shall be bid by individual trade contractors to the District pursuant to the Public Contract Code. When bidding is complete and all bonds verified, the contracts shall be executed by the District and assigned to the CM for management through the completion of the contract. The Construction Manager shall perform the services of an on-site Construction Manager during construction by providing scheduling, supervision, change order negotiations, and other activities required to build the project.

1.1.6. **Nature of the Award.** The intent of the District is to award contract(s) for <each or all> project(s) listed in this Request for Proposals.

1.1.7. **Basis for Selection.** The District will evaluate the individual proposals on their merit and select the proposal deemed to be the most advantageous to the District. The District reserves the right to select a proposal which in its opinion represents the best overall value regardless of price.

2. Proposal Schedule

- 2.1. Advertisement or release of RFP. <date>
- 2.2. Pre-Proposal conference. <date><time>
- 2.3. Questions due. <date><time>
- 2.4. Submissions due <date> <time>
- 2.5. Interviews to be conducted <date range>
- 2.6. Notice of selection <date range>

### 3. General Requirements

#### 3.1. Instructions to applicants

**3.1.1.Pre-Proposal Conference.** A **<mandatory/non-mandatory>** Pre-Proposal Conference is scheduled on **<date>** at **<time>** and will be held at the **<exact room/area>** located at **<address, city, state>**.

**3.1.2.Questions.** All questions related to this RFP should be directed to **<insert name>**, **<insert position>**. **<insert name>** can be contacted at **<insert phone number>** or **<insert email>**. All questions must be submitted no later than **<insert time/date>**. Questions received after the above-noted deadline may be answered at the discretion of the District. Responses to all questions received by the District will be provided to all firms that attended the Pre-Proposal conference or are known to be in receipt of the RFP. Responses will be provided **<via email/website/fax/other>**.

**3.1.3.Delivery requirements.** **<insert number>** copies of your proposal must be received at **<exact room/area>**, located at **<address, city, state>**, no later than **<time>** on **<date>**. The proposal must be sealed in a box/envelope. Respondent's name and address shall appear in the upper left hand corner of the box/envelope. Proposals submitted electronically or by fax will not be accepted. It is the responsibility of the proposer to ensure proper and timely delivery of the proposal.

**3.1.4.Proposals to be prepared at firm's expense.** Costs for preparing responses and any other related material is the responsibility of the proposer and shall not be chargeable in any manner to the District. The District will not be held liable for any cost incurred by proposers in response to this RFP.

**3.1.5.District reserves the right to accept or reject any and all proposals.** The District reserves the right to reject any or all responses, or may waive any informality in a response. Failure to respond to all submission requirements set forth in Article 4 may result in rejection of your proposal. All proposals submitted shall become the property of the District.

**3.1.6.Supplemental information.**

**3.1.7.Addenda.**

**3.1.8.Prerequisite requirements**

**a. Licensing.** Proposing firms shall be properly licensed in accordance with Government Code section 4525 (e). (Optional. Proposing firms must possess a valid Class B contractor's license and certify that this license has not been suspended, revoked, or the subject of a complaint requiring a formal hearing within the last seven (7) years.)

**a. Evidence of ability to meet minimum Insurance requirements.** Proposer must be able to carry, maintain and keep in full force and effect, a policy or policies of insurance in accordance with the Construction Management Agreement incorporated as Exhibit B and as identified below.

➤ **Statutory workers' compensation.** Workers compensation must meet all applicable requirements of the Labor Code of the State of California and occupational disease insurances as applicable, including employer's liability insurance in limits of not less than One Million Dollars (\$1,000,000) for each person and One Million Dollars (\$1,000,000) for any one accident, covering all of Construction Manager's personnel.

- **Comprehensive general liability.** General liability must cover the work with bodily injury and death limits of not less than One Million Dollars (\$1,000,000) as to any one occurrence and property damage insurance with limits of not less than One Million Dollars (\$1,000,000) as to any one occurrence, Two Million Dollars (\$2,000,000) aggregate.
- **Combined single limit automobile public liability insurance.** If not included in general liability coverage, automobile insurance must cover bodily injury and property damage in an amount not less than One Million Dollars (\$1,000,000). Said automobile insurance shall cover all owned, non-owned and hired vehicles used by Construction Manager in performance of the project.
- **Professional Liability Insurance.** A proposing firm must have in place a professional liability policy in the amount of One Million Dollars (\$1,000,000).

## 4. Submission Requirements

### 4.1. Proposal Format

- 4.1.1. Proposal presentation (folder/bound).** The submission, in its entirety, must be bound in some form or enclosed in a three ring binder.
- 4.1.2. Pages.** The proposal is limited to seventy five (75) pages, 8.5"x11". Title sheets, table of contents and dividers do not count toward the page limit.
- 4.1.3. Specify tabbed sections.** Proposal must contain dividers which separate the following sections: Company Qualifications, Project Experience and References, Project Team and Technical Capabilities.
- 4.1.4. General conditions and fee proposal.** Provide a general conditions and fee proposal for the project(s).

### 4.2. Proposal Content

**4.2.1. Letter of Interest.** The letter should introduce the company and team. At a minimum the letter of interest must include project(s) on which you are submitting, company name, address, telephone number, fax number and principal contact name.

#### 4.2.2. Table of Contents

**4.2.3. Company Qualifications.** Provide a brief history of your firm including:

- a. **Legal Entity.** Describe the legal entity under which your organization operates.
  - If your firm is a corporation provide the date of incorporation, state(s) of incorporation filed, president's name, vice president's name(s), secretary's name, and treasurer's name.
  - If your firm is a partnership or joint venture provide the date of organization, type of partnership or venture, names of general partners and limited partners. Joint ventures are to provide an explanation why they are associating.
  - If your firm is a sole proprietor provide the date of organization and the name of the owner.
- b. **Litigation/Arbitration/Termination.** If you have been a party in any litigation, mediation, arbitration with and owner, or if you have been terminated for cause while under a construction management agreement, describe each event in detail and indicate the final results.

Data Field	Multiple Prime	Agency	At-Risk
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c. **Business Experience and Licensing.** Describe the business experience of your organization:

- Indicate the year your organization was founded under the present name.
- List any other or former names under which the organization has operated.
- Indicate the number of years your organization has practiced Construction Management.
- If your organization operates from more than one location, indicate the office from which the proposed project will be served.
- Indicate the qualifying contractors license or professional registration number.
- Include current certificates of insurance.

**4.2.4. Project Experience and References.** Describe the construction experience of your organization. For each project listed below indicate the project name, description of facility, delivery methods, location, owner, owner contact name and phone, architect contact and phone, construction cost, start date, completion date.

- a. **Relevant projects in progress.** Provide a list of relevant projects currently in progress or under contract and specify the delivery method.
- b. **Relevant projects completed.** Provide a list of relevant projects completed in the last seven years and specify the delivery method.
- c. **(Optional: Sustainable projects.** Provide a list of projects completed, or in progress, that have resulted in a LEED or CHPS certification and specify the delivery method.)

#### 4.2.5. Project Team

a. **Team organizational chart.** If possible, provide a proposed organizational chart of the project team. Alternatively, provide a schematic organizational chart showing proposed staffing levels.

- <Contract executive>
- <Project manager(s)>
- <Superintendent(s) >
- <Project engineer(s) >
- <Project administrator(s)>

b. **Resumes.** Provide resumes for each member of the proposed project team. Resumes must, at a minimum, include the following:

- Number of years employed by firm
- Education
- Relevant technical experience
- A list of projects worked on, at what capacity they were involved and the dates personnel were assigned to the project

#### 4.2.6. Technical Capabilities

a. **State and local agencies.** Describe your organizations familiarity with the procedures and requirements of the following state and local agencies and their approval process:

- Office of Public School Construction
- Department of State Architect

Data Field	Multiple Prime	Agency	At-Risk
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- Department of Toxic Substance Control
- California Department of Education

b. **Consultants.** Provide a list of any proposed consultants and the work that they will perform.

c. **Project approach.** Provide a statement of the firm’s project approach to the work.

- Include information on your cost estimate history and change order evaluation
- Describe your approach to planning, scheduling, coordinating all work, trades, etc.
- Describe your firm’s ability to perform all services listed in Exhibit A Scope of Services. List any services your firm will not be able to provide to the District.

**4.2.7. General conditions and fee proposal**

a. **CM FEE.** Provide a detailed fee proposal to perform the services listed in Exhibit A Scope of Services.

b. **General Conditions Cost Schedule.** Provide an estimated general conditions cost schedule.

**5. Evaluation and Award Process**

**5.1. Evaluation Criteria.** All proposals deemed responsive and able to meet prerequisite requirements as outlined in Article 3.1.8 will be evaluated based on the following:

- Firm’s qualifications
- Relevant experience
- Project team experience and capabilities
- General conditions and fee competitiveness

**5.2. Interview.** Following the qualifications based evaluation process, an initial shortlist of firms will be identified to be interviewed. A shortlist of qualified firms will be determined by **<date>** and interviews will be scheduled for the week of **<date>**.

**5.3. Final Selection.** Final selection of the successful firm will be made on or about **<date>** and will be placed on the Board of Education agenda of **<date>**. A contract will be negotiated following the selection of any one firm to perform Construction Management **<insert delivery>** services on a given project. If contract negotiations with the firm determined to provide the best value to the district are not successful, and/or the fees discussed are outside the budgetary constraints for the project, the District reserves the right to suspend negotiations with the firm, and proceed to the next firm.

**6. List of Exhibits**

- EXHIBIT A Scope of Services**
- EXHIBIT B Sample Agreement**
- EXHIBIT C General Conditions Cost Schedule**

	Data Field	Multiple Prime	Agency	At-Risk
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**EXHIBIT A  
SCOPE OF SERVICES**

1. **Preconstruction Services.** Construction Manager shall provide services that relate to the organization and development of the project prior to the start of construction including the following:

- a. **(Optional: LEED/CHPS Services.** Review the design and detail to confirm the project will receive the LEED certification specified by the district and make sure that there is no ambiguity that may make for difficult enforcement of contractor(s). Identify and scope all construction LEED/CHPS activities and documentation required.)
- b. **Site Evaluation.** Consult with District staff in relation to the site selected or to be selected. Assist with DTSC and CDE site approval processes.
- c. **Plan Review: Value Engineering and Constructability.** Value Engineering and Constructability: Provide plan review and constructability services with an emphasis on ensuring that the project can be completed within the established schedule and within the available budget. Provide a detailed analysis of all major project systems with an emphasis on possible value engineering items.
- d. **Master Budgeting and Scheduling.** Provide master budgeting and scheduling services including the identification of anticipated project revenues and expenditures based upon traditional project milestones.
- e. **Detailed Construction CPM Schedule.** Produce detailed construction CPM schedule to be incorporated into the project documents including identification of the project critical path.
- f. **Preliminary and Detailed Estimates.** In concert with item c. above, provide a preliminary construction estimate using like kind construction costs. Upon receipt of plans and specifications, provide a detailed construction estimate showing the values of all major components of the project.
- g. **Bidding Strategies.** Consult with District staff regarding bidding strategies with an emphasis upon timing, development of alternates, and bid package scoping.
- h. **Project Accounting and Management Systems.** In concert with District staff, develop the project accounting and budget management systems.
- i. **General Conditions Document Preparation.** The Construction Manger shall ensure that the General Conditions documents are suitable for the Construction Management delivery method. The Construction Manager and the District shall coordinate this effort with District's legal counsel and obtain the District mandated approvals prior to publication.

2. **Bid/Award Phase Services:**

- a. **Bidder Interest.** Generate and encourage bidder interest in the project and provide assistance with such issues as bonding, insurance, and DVBE compliance.
- b. **Advertisements.** Assist District staff with the placement of both the project legal advertisements and any other pre-bid advertisements.

	Data Field	Multiple Prime	Agency	At-Risk
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- c. **Pre-bid Conferences.** In cooperation with District personnel conduct pre-bid and site visit meetings with potential bidders.
- d. **Responses to Bidder Inquiries.** Provide coordination of and, when possible, responses to bidder inquiries.
- e. **Plan and Addenda Distribution.** Distribute all plan sets, bid packages, and addenda.
- f. **Bid Evaluation and Review.** Review and evaluate all bids for responsiveness and certify the construction bid results.
- g. **Contract Documents.** Prepare contract packages for District review. Distribute and monitor completion of these contract packages.
- h. **NOA's and NTP's.** Issue Notices of Award (NOA) and Notices to Proceed (NTP) on behalf of the District.

**3. Construction Phase Services:**

- a. **CPM Schedule Maintenance.** Maintain a detailed and date specific CPM schedule. Continue to update the CPM construction schedule monthly and distribute to the appropriate parties.
- b. **Budget Control and Maintenance.** Prepare cumulative project budget reports updated regularly with the latest construction cost and soft cost data.
- c. **Storm Water Pollution Plan.** Ensure that responsibility for the Storm Water Pollution Prevention Plan is assigned as appropriate for the project.
- d. **(Optional: LEED/CHPS Services.** Provide required submittal review, monitor material procurement and construction activities required to achieve LEED/CHPS points.)
- e. **Agency Interface.** Provide agency interface during construction process.
- f. **Schedule of Values.** Review and reconcile each contractor's schedule of values for each of the activities included in the construction schedule. Incorporate this report into the project standard billing package and use as the basis for all future progress payments during the construction phase.
- g. **Monthly Billing Procedures.** Generate a standard billing process and confirm billing information from the contractors. Review and obtain Inspector and Architect approvals. Forward monthly contractor billing packages to the District.
- h. **Conduct Pre-Construction Conference.** Conduct pre-construction conference for the benefit of the successful contractors. Provide information with regard to reporting procedures and site rules and regulations prior to the start of construction.
- i. **Project Record Documents.** Coordinate and expedite all activities in connection with the contractors' obligation to provide "as-built" documents. Ensure that all as-builts are incorporated into a single set of Project Record Documents.
- j. **Interim Housing.** Schedule and coordinate District interim housing requirements so as to minimize disruption to both the construction progress and any ongoing District activities.
- k. **Document Control.** Establish and implement procedures for submittals, change orders, and requests for information. Maintain logs, files, and other necessary documentation.

<i>Data Field</i>	<i>Multiple Prime</i>	<i>Agency</i>	<i>At-Risk</i>

- l. Shop Drawings & Submittals.** Review and monitor the status of shop drawings and related correspondence.
- m. Administration of the Construction Contracts. Management and Supervision:** Manage, supervise and coordinate all construction activities in accordance with the Construction Documents and project schedule. Provide onsite management of the project as necessary. Ensure that District requirements regarding certified payrolls and subcontractor and material supplier releases are carried out.
- n. Change Order Review.** Establish and implement a change order processing system that provides review of scope, price, and added contract time.
- o. Contractor Claims.** Evaluate and mitigate all claims for additional cost or time due to any alleged cause.
- p. Verified Reports.** Process and forward all verified reports to the Architect for submission to DSA.
- q. Project Meetings.** Coordinate and attend weekly job-site progress meetings with the District, Architect, Inspector of Record, and Prime Contractors if and when needed.
- r. Insurance Certificates.** Monitor Prime Contractor insurance certificates for coverages, endorsements, limits, and expiration dates.

**4. Post Construction and Project Close-Out Services:**

- a. Relocation.** Coordinate the arrival and installation of District furnished materials and F&E. Provide coordination schedules for user relocation
- b. User Training.** Schedule and document all District training sessions. Arrange for supplementary information where needed. Arrange for Manufacturers to conduct training for maintenance and operations staff
- c. Punch lists.** In conjunction with the Architect, develop a punch list of defective work. Create a punch list schedule for completion. Verify completion of punch list items.
- d. Submit As-Builts.** Review contractual requirements for As-Built Documents and create appropriate procedures to ensure the completeness and timeliness of these documents.
- e. Project Closeout and Warranties.** Create Operation and Maintenance Manuals. Compile all contractor turn-over items and deliver to the district. Process and coordinate all post construction project warranty and guarantee claims
- f. Final Lean Releases.** Verify requirements in the Construction Documents.
- g. OPSC/DSA Close Out.** Provide a checklist of items that must be submitted to OPSC and DSA for close out.

	<i>Data Field</i>		<i>Multiple Prime</i>		<i>Agency</i>		<i>At-Risk</i>
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**EXHIBIT B  
SAMPLE AGREEMENT**

**EXHIBIT C  
GENERAL CONDITIONS COST SCHEDULE**

Place an "X" in the appropriate column to clarify ownership of the expense

Description	Qty			Total	CM Fee	General Conditions	District Expense	By Others
		Unit	Unit Cost					
Senior Superintendent								
Superintendent								
Field Superintendent								
Project Manager								
Assistant Project Manager								
Project Engineer								
Estimator								
Project Scheduler								
Clerical/Certified Payroll								
Administrative Assistant								
General Clean Up								
Emergency Clean Up								
Final Clean Up								
Punch List								
Safety Measures (Supplies & Signs)								
First Aid Kits								
Hard Hats								
Dust Control								
Dewatering/Erosion Control								
Weather Protection								
Safety Labor								
CM Trailer Rental								
Office Furnishings								
Office Sanitation								
Trailer Mobilization & Set up								
Trailer Demobilization & Relocation								
Trailer Alarm (includes commissioning)								
Caretaker/Security								
Project Signs								
Bulletin Boards								

Description	Qty			Total	CM Fee	General Conditions	District Expense	By Others
		Unit	Unit Cost					
Temp Power Poles								
Power Pole Hookup								
Power Lines & Chords								
Set Subfeed Panels								
Power Consumption								
Water Consumption								
Toilets / Hand Wash								
Trash Bins								
Storage Bins								
Fencing								
Temp Lighting								
Extend Temp Utilities								
Management Fuel								
Supervision Fuel								
Equipment Fuel								
Management Vehicle								
Supervision Vehicle								
Blueprints/Plans (incl. Reproduction)								
Bid Printing								
Photos/Film/Video								
Photo Reproduction								
Construction Surveying								
C.P.M. Schedule								
Computer Systems								
Internet Service								
IT Expenses								
Copier								
Fax Machine								
Telephones & Intercom								
Cellular Phones								
Construction Water								
Hydrant Meters								
Construction Power								
Subsistence & Travel								
Office Supplies								
Drinking Water/Coffee								
Postage/Shipping								

Data Field
Multiple Prime
Agency
At-Risk

Description	Qty			Total	CM Fee	General Conditions	District Expense	By Others
		Unit	Unit Cost					
Permits								
Fees								
Licenses								
Builder's Risk Insurance								
Professional Liability Insurance								
Labor Escalation								
Budget General Conditions:				\$ -	\$ -	\$ -	\$ -	

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**Provide any additional general condition requirements not listed above.**