



**Request for Proposal:
Construction Management Services**

Issue Date: August 30th, 2017

Due Date: September 18, 2017 by 2:00 pm

Submittal Location:

Monona Grove School District
Jerrud Rossing, Director of Business Services
5301 Monona Drive
Monona, WI 53527

Request for Proposal Construction Management Services

Description and Objections

The Monona Grove School District (the “District”) is seeking proposals for Construction Management Services (“CM”) from construction firms interested in contracting with the District to provide desired services as outlined in this Request for Proposal (“RFP”).

The District has identified the following objectives:

- Maximize facilities utilization across the District
- Provide quality educational facilities that proactively meet the needs of students
- Develop a long-range facilities plan including the maintenance of existing buildings and to address student growth

Background

The District, located in Dane County, educates over 3400 students from Early Childhood through Grade 12. The District currently operates five (5) school buildings and one (1) District Office: three elementary schools (Located in Cottage Grove, WI: Cottage Grove Elementary (Grades 2-4), Taylor Prairie (Grades 4K-1); Located in Monona, WI: Winnequah Elementary School (Grades 4K-5)), one middle school (Located in Cottage Grove, WI: Glacial Drumlin School (Grades 5-8)), one high school (Located in Monona, WI) and one high school charter school (Grades 9-12) housed within the District Office (located in Monona, WI).

Eppstein Uhen Architects and CG Schmidt were hired in January 2015 to complete a comprehensive facility study. The Facilities Study was first step in a phased approach to facilities planning. The Districtwide Facilities Study provided an independent, objective analysis of the present conditions and capabilities of the District’s facilities and grounds. The study will serve as a foundational resource document to support immediate and long-term facilities planning.

The District has received two enrollment studies, both of which indicate enrollment growth for the District. Vandewalle and Associates completed a Long Range Growth Plan in April 2015. The Long Range Growth Plan by Vandewalle and Associates was updated as of March 2017. In addition, the District has received an enrollment growth study prepared by the Applied Population Laboratory with the University of Wisconsin-Madison.

On August 9th, 2017, the Board of Education selected Eppstein Uhen Architects to assist the District through the next steps of facility planning as the Architect.

Scope of Services

Services required from the Construction Manager shall include, *but not be limited to*, the following:

A. Pre-construction Services:

a. District Planning and Data Collection:

The CM shall serve as a member of the District's integrated core planning team. CM shall attend regular meetings with the District and the Architect as well as any committee meetings related to facility planning. The CM shall consult with the district and Architect regarding site use and improvements and the selection of materials, building systems and equipment. The CM shall provide recommendation on construction feasibility; action designed to minimize adverse effects of labor or material shortages; time requirement for procurement, installation and construction completion; value engineering, and factors related to construction cost including estimates of alternative designs or materials, preliminary budgets and possible economies. Assist in the planning and potential construction needs to increase the school capacity effectively as enrollment increases. Assist the District in defining and clarifying its corresponding building needs, defining the scope of the needed construction over a detailed timeline and solving architectural problems in an effective manner. As well as assist in the leadership and planning of stakeholder groups and other community groups.

b. Referendum Assistance:

The CM shall assist the District and its Architect firm by helping prepare informational materials, participation in referendum presentation, public hearings, listening session, focus groups and providing updated date/information regarding the project to the District.

c. Preliminary Project Schedule:

The CM shall prepare, and periodically update, a preliminary construction schedule for the District's review and approval. As design proceeds, the preliminary construction schedule shall be updated to indicate proposed activity sequences and durations, milestone dates for receipt and approval of pertinent information, preparation and process of shop drawings and samples, delivery of materials, or equipment requiring long-lead time procurement, District's occupancy requirement showing portions of the project having occupancy priority, and data of substantial completion.

d. Phased Construction:

The CM shall make recommendations to the District and Architect regarding the phased issuance of Drawings and Specifications to facilitate phase construction of the construction work, if such phased construction is appropriate for the project taking into consideration such factor as economies, time of performance, availability of labor and materials and provisions for temporary facilities.

e. *Preliminary Cost Estimates:*

- i. The CM shall work with the District and Architect to provide cost estimates for each of the different facilities options, this may include new building(s), remodeling, upgrading and additions to current district facilities.
- ii. When Schematic Design Documents have been prepared by the Architect, the CM shall prepare for the Architect review and approval of the District, a more detailed estimate and supporting data.
- iii. When the Designed Development Documents have been prepared by the Architect, the CM shall prepare a detailed estimate with supporting data for review by the Architect and there review and approval by the District.
- iv. If any estimate submitted to the District exceeds the previously approved estimates or the District's budget, the CM shall make appropriate recommendations to the District.

f. *Subcontractor and Supplier Solicitation:*

The CM shall seek to develop subcontractor interest it he project and shall furnish to the District and Architect for their information, a list of possible subcontractors, including suppliers who are to furnish materials or equipment fabricated to a special design, from who's proposal will be requested for each principal portion of the Construction Work.

g. *Direct Purchase System:*

The CM shall establish/implement a Direct Purchase System acceptable to the District to save state sales tax on buildings equipment/materials purchased for the proposed projects.

h. *Guaranteed Maximum Price/Contract Time:*

Upon completion of the design development phase, the CM shall propose a Construction Guaranteed Maximum Price (GMP), which shall be the sum of the estimated Cost of Construction Services and the CM's fee.

B. Construction Phase Services:

- a. Receive, organize and qualify all bids
- b. Site traffic and access control
- c. Manage and coordinate all construction activities
- d. Scheduling
- e. Quality control services
- f. Safety management
- g. Coordinate/maintain record drawings
- h. Punch list preparation and document completion for final acceptance
- i. Direct (District) purchase system, execute and monitor
- j. Conduct weekly on-site construction meetings
- k. Manages subcontracts
- l. Coordinate initial schedule and monthly updates
- m. Manage, document and negotiate variation in scope, including direct purchase materials
- n. Provide shoe drawing review and coordination prior to required Architectural review
- o. Provide quality assurance inspection

- p. Provide job cost reporting with monthly financial updates
- q. Recommend and approve monthly applications for payment
- r. Provide vendor status report
- s. Provide direct purchase status reports
- t. Assist in system start-up and staff instruction, and creation for operation and maintenance manuals
- u. Provide post construction evaluation
- v. Coordinate project closeout
- w. Submit all warranties and guarantees

RFP Timeline

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| 1. RFP Issued | August 30 th , 2017 |
| 2. Last date/time to submit questions regarding RFP via email | September 8 th , 2017@3:00 p.m. |
| 3. Voluntary meeting to answer questions related to the RFP | September 11 th , 2017 @1:00 p.m. |
| 4. Proposals Due to District | September 18 th , 2017 @2:00 p.m. |
| 5. Review RFP responses and select which firms will be invited to participate in presentation/interviews | September 19 th , 2017 |
| 6. Notify firms selected to participate in presentations/interviews | September 19 th , 2017 |
| 7. Presentation/Interviews | October 2, 2017 (Evening) |
| 8. Approval of firm by Board of Education | October 13 th , 2017 |

Informational Meeting

The District will hold a voluntary informational meeting on Monday, September 11th, 2017 at 1:00 p.m. to address vendor questions and provide, as needed, clarification to firms interest in submitting a proposal to the District. The meeting will be held at the Monona Grove School District Office, located at 5301 Monona Drive, Monona, WI 53716.

Firm Profile and Proposal Response

Respondents to this RFP shall include the following minimum information in their proposal:

- 1. Firm name, business address, telephone, fax number, E-mail address, and contact person.
- 2. A general description of your firm, including size, years of operation and customer base.
- 3. General qualifications: describe the general qualifications of the firm(s).
- 4. Staff qualifications: submit resumes demonstrating relevant experience of key personnel to be assigned to this project. Specify the role of each key staff member in the project.
- 5. Describe how your firm will organize and perform the work describe in the Scope of Services Section.
- 6. List the names of any sub-consultants that are intended to be used on the project and the specific service to be provided by the sub-consultants.
- 7. Describe your firms understanding of the project and planned approach to achieve the goals of the project.
- 8. List trade categories in which your firm is legally qualified to do business.
- 9. What percentage of work do you normally perform with your own firm’s staff/employees? Describe your experience at performing similar self-performed work in the trade area of the project with tin the last five (5) years.

10. If selected, what elements or areas of work would you propose to self-perform? Explain the benefits to the District of your firm self-performing these particular areas of work.
11. How would the District be assured of your firm's quality and control in the area of self-performed work while receiving competitive construction costs? The District may require the CM to bid certain self-performed work. Explain how this requirement may affect your fee or the project schedule?
12. Has your organization ever failed to complete any work awarded?
13. Are there any judgements, claims, arbitration proceedings or suites pending or outstanding against your organization or its officers?
14. Has your organization filed any lawsuits or requested arbitration with regard to construction contracts?
15. Has your organization ever had a lawsuit filed or arbitration requested with regard to construction contract against your organization. Please explain.
16. Describe how you would assist the District with the referendum process. Include several specific examples of strategies/services that your firm has utilized or provided in the past to assist clients.
17. What do you see your role in the Monona Grove Facilities Planning process?
18. Describe your approach to bidding the work for this possible project?
19. How will you keep the District informed regarding project schedule progress during the construction process.
20. What do you believe the role of the Architect is or should be?
21. Provide a fee proposal using the attached fee proposal worksheet. Fees shall include ALL meetings needed to successfully complete this project and ALL reimbursable cost other than plan/document printing cost (incurred for the bidding phase the project) and required plan submittal fees.
22. Please describe your change order process?
23. Please provide a list of past project names, location, description of project, project cost, CM's role in project and contact person of a minimum of 3 educational projects within the last 10 years.
24. Provide a description of any possible additional related costs and/or fees (not included in your base fee) that the District might incur as a result of this facilities planning process.
25. Provide a description of monthly status reports, e.g. project timelines, deliverables, cost incurred to date and cost of project timeline.

Proposal Evaluation and Selection Process

Responding firms will bear all costs of responding to the RFP and interviews, if any. The responses will be evaluated of a panel consisting of individuals selected by the District. At the District's discretion, to further assist in the evaluation, some, one, or all of the responding firms/individuals may be requested to participate in an interview/presentation process. The interview will be used as another opportunity to clarify any issues within the given responses and explore the approaches that may be used to satisfy all requirements for the District.

Upon the completion of the selection process, the District will notify the firms of the selection and the successful firm to enter into an agreement. Firms shall submit fee proposals using the fee proposal

worksheet provided within the RFP. At the District's discretion, it may directly negotiate with the best qualified firm on the final scope and budget. The selected firm shall be required to enter into a written contract issued by the District and their legal counsel.

The District may investigate the qualifications of any individual or firm under consideration, require confirmation of information furnished and require additional evidence of qualifications to perform the services described in this RFP.

The District also reserves the certain rights, including, but not limited to, the following:

1. Reject any or all of the proposals
2. Issue subsequent Request for Proposals or amendments/modifications to this RFP
3. Cancel the entire Request for Proposal or portions of the process
4. Remedy technical errors in the Request for Proposal process
5. Seek the assistance of outside technical experts in the evaluation of the proposals
6. Approve or disapprove the use of particular subcontractors
7. Negotiate with any, all or none of the firms
8. Solicit best and final offers from all, some, or one of the firms
9. Award contact to one or more firms
10. Waive informalities and irregularities in the RFP
11. Award without discussion

Selection will be based on upon determination as to which proposal is in the best interest of the District. Any decision made by the District, including the selection of vendor, shall be final and is NOT subject to appeal.

The RFP shall not, in any manner, be construed to be an obligation on the District to complete all or any part of the project, enter into a contract or result in a claim for reimbursement of cost for any efforts expended in responding to the RFP or in anticipation of any contract.

Submittal Requirements

Any questions concerning this RFP must be submitted via e-mail on or before September 8th, 2017 at 3:00 p.m. to:

Jerrud Rossing, Director of Business Services
Monona Grove School District
E-mail: jerrud.rossing@mgschools.net

All responses to this RFP shall be received by the District no later than 2:00 p.m. on September 18th, 2017. Ten (10) hard copies of your proposal is requested along with one (1) electronic copy.

Responses to this RFP should be delivered to:

Jerrud Rossing, Director of Business Services
Monona Grove School District
5301 Monona Drive
Monona, WI 53716

Proposals shall be clearly marked “Proposal for Construction Management Services” and shall clearly identify the firm submitting the proposal. Proposals shall not be accepted by e-mail.

Proposals received after the date and time specified will be returned unopened. All proposals will become property of the District and public record upon their delivery.

END OF RFP

**Monona Grove School District
Construction Management Services RFP - Fee Proposal Worksheet**

Name of Firm: _____

Address: _____

Contact: _____

Telephone: _____

E-Mail: _____

Please state the fees for this project below:

Preconstruction Service Fee (if any):

Fee shall be expressed in flat dollar amount (there shall be no reimbursable allowed – all costs should be included in your fee):

If the District decides to move to the Construction Phase, will any fees paid towards the Preconstruction Services Fee be applied to the Construction Phase:

NO: _____ **YES:** _____ **How much will be credited:** _____

Construction Management Fee (if any):

Fees shall be expressed in flat dollar amount (there shall be no reimbursable allowed – all cost should be included in your fee):

Total Construction Services Fee:

Fees shall be expressed as a percentage of the total construction costs for the project.

_____ %

Please list and explain any additional cost that would not be included in the fees already listed above. Only fees that are outlined in the proposal submitted will potentially be included in the contact with the selected firm.

The undersigned attests that the information contained within the proposal is accurate to the best of his/her knowledge, and that the firm he/she represents, if selected, agrees to incorporate the requirements of this RFP in the final contract with District:

Signature of Person Authorized to Submit Proposal: _____

Printed Name of Signature Above: _____

THE FORM OF ARCHITECT'S AGREEMENT IS ATTACHED.