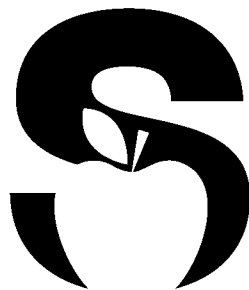


**SEMINOLE COUNTY PUBLIC SCHOOLS  
FACILITIES PLANNING DEPARTMENT**

**REQUEST FOR  
STATEMENT OF QUALIFICATIONS**



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**CONSTRUCTION MANAGEMENT AT RISK  
SERVICES FOR**

**HVAC SYSTEMS REMODELING**

**GENEVA ELEMENTARY SCHOOL  
&  
GREENWOOD LAKES MIDDLE SCHOOL**

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September 16, 2013

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## **SECTION 1 — REQUEST FOR QUALIFICATIONS**

Pursuant to Sections 287.055, Florida Statutes, the State of Florida's Consultants' Competitive Negotiations Act, and the State Requirements for Educational Facilities 1999, the School Board of Seminole County, Florida, will consider the contracting of Construction Managers to provide construction management services for:

### **HVAC SYSTEM REMODELING GREENWOOD LAKES MIDDLE SCHOOL GENEVA ELEMENTARY SCHOOL**

The scope of work will include pre-construction and construction services for the project. The project will start January of 2014 and be complete January 2015.

Business entities interested in providing Construction Management At Risk services to Seminole County Public Schools are hereby notified that seven (7) sealed and electronic copy of statements of qualifications for providing the required services must be received by 4:00 PM, local time, Friday, October 11, 2013, at the reception desk of the Facilities Planning Department located at Seminole County Public Schools' Educational Support Center, 400 East Lake Mary Boulevard, Sanford, Florida, 32773-7127. . Multiple firms will be considered for each campus site project.

Information and instructions for completing and submitting the Statement of Qualifications, and all addenda if issued, may be downloaded from the SCPS web site at <<http://www.scps.k12.fl.us>> (Departments-'Facilities' link) or obtained from Seminole County Public Schools, Educational Support Center, Facilities Planning Department (4th floor, receptionist's desk), 400 E. Lake Mary Boulevard, Sanford, Florida, 32773. In order to receive notice of supplemental information, responses, addenda, or clarification(s) regarding the RFQ, firms must register via E-mail to <[susan\\_cline@scps.k12.fl.us](mailto:susan_cline@scps.k12.fl.us)> or via facsimile letter to Susan Cline at (407) 320-0292. Only firms formally registered per above will be notified.

A pre-submittal meeting will be held to review the requirements of the Qualification Statement at 3:00 PM local time, Thursday, October 3, 2013, in the school board meeting room (1st floor), Seminole County Public Schools, Educational Support Center, at the address listed above.

A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

Seminole County Public Schools reserves the right to waive any informalities in the selection process and to reject any or all Statements of Qualifications.

/s/ George Kosmac  
Deputy Superintendent of Operations

Advertising Date  
September 22, 2013  
September 29, 2013

## **SECTION 2 - PROJECT SCOPE**

The Seminole County Public School district is soliciting written statements of Qualification from construction management firms desiring to provide construction management at risk services. The district intends to award a contract to the entities deemed most qualified and responsive to this request. Separate firms will be considered for selection for each campus site project location.

The construction management services shall include, but are not limited to the following; preconstruction services (value engineering, cost analysis, and scheduling evaluations), bidding and contracting with all subcontractors, coordinating scheduling of the work, supervision of the work and working with the engineer of record on the project. The district will provide permitting, building code and fire inspection support services.

### **Management Of Construction**

The Construction Manager (CM) will be responsible for construction management services for the remodeling of HVAC equipment and systems at Geneva Elementary School and Greenwood Lakes Middle School. The services required will occur throughout the design phase, bid and award phase, construction phase and post construction phase.

The scope of work for the projects has not been finalized. The district anticipates the award of an engineering services contract on or about November 19, 2013. The selected engineering firm will work with district staff to complete the program and scope of work early 2014. The current project description is:

HVAC system remodeling projects have been funded for Geneva Elementary and Greenwood Lakes Middle Schools. Each project will have two design and construction phases. The first phase will be to determine the optimal design and release a specification for equipment to be procured and delivered by June 10, 2014. The second phase shall include the construction work for the project. The construction documents shall be completed by May 5, 2014. The remodeling construction will occur between June 2014 and January 2015.

The proposed project at each campus involves the replacement of existing HVAC systems, equipment, and controls to extend the service life a minimum of 25 years and to improve operational efficiency and design within current code standards. Air distribution will also be affected depending upon design. Each project will be designed such that all equipment is on-site and ready for installation by June 2014, and that 100% construction documents are complete and released by May 5, 2014.

Geneva Elementary School is a 67,000SF campus originally constructed in 1988. The mechanical system consists primarily of individual classroom fan coil units and closed loop cooling tower. The construction budget (including equipment) for this project is \$2.8 Million.

Greenwood Lakes Middle School is a 124,000SF campus originally constructed in 1985. The mechanical system consists primarily of DX chilled water with individual classroom constant volume air units. The construction budget (including equipment) for this project is \$5.6 Million.

The replacement systems designed at each campus shall comply with current code and operational standards.

***Note:** Any further information about the proposed project will be provided to the short listed firms only. At this time the committee is strictly interested in the CM firms' qualifications to provide construction management services, and their experience with the construction of similar HVAC system remodeling projects with constrained schedules.*

The services required for the construction program include, but are not limited to the following:

**A. Design Phase**

1. The Construction Manager will be required to work with the engineer of record.
2. The Construction Manager will be required to participate in the district's "Partnering Program".
3. The Construction Manager will submit for approval by the engineer and the Owner's representatives applicable cost and time savings incentive options.
4. The Construction Manager will be required to work with and coordinate activities with any other contractors that the district may have awarded for the project.
5. The Construction Manager will assist the district and the design team during the scope development phase with design options.
6. The Construction Manager will review progress design documents and provide value engineering recommendations in all disciplines which may be applicable including civil, structural, landscaping, mechanical, plumbing and electrical.
7. The Construction Manager will review construction documents to ensure constructability and to minimize change orders.
8. The Construction Manager will review construction documents to minimize omissions and conflicts.
9. The Construction Manager will prepare in 16 division CSI format, detailed estimates of probable cost of construction and update as needed prior to establishing the Guaranteed Maximum Price. Included with the estimate shall be a detailed list of all assumptions and

exclusions in developing the estimate of probable construction cost, and indicate any allowances that are incorporated into the estimate.

10. The Construction Manager shall provide (as a minimum), monthly cost accounting reports in a format and detail satisfactory to the district. The format and detail shall be consistent throughout the contract duration.
11. The Construction Manager will coordinate with the engineer to finalize the Construction Documents.
12. The Construction Manager will prepare for approval a schedule of proposed hourly rates to be used in assessing the Construction Manager's fixed fee for his preconstruction services.
13. The Construction Manager will commit to the project budget and guarantee a maximum price based on the Documents and successful negotiations with the Owner. The Guaranteed Maximum Price will include the Construction Manager's fees for all construction services.
14. The Construction Manager will establish the master project schedule identifying all different phases and all milestone items keeping in mind the school year dates and hence the limitations.
15. The Construction Manager will coordinate with the engineer and provide to the Owner all permitting applications and requirements as needed.
16. The Construction Manager will prepare and submit for the Owner and engineer review and approval, progress reports during the preconstruction phase documenting value engineering, budget and scope issues.

**B. Bid And Award Phase**

1. The Construction Manager will schedule and conduct prebid conferences with the interested subcontractors, material suppliers, and equipment suppliers.
2. The Construction Manager will identify and solicit multiple bid packages that together will represent the entirety of the scope of work.
3. The Construction Manager will provide a subcontractors prequalification process for approval by the engineer and the Owner's representative. The Owner reserves the right to reject any subcontractor proposed for any of the bid packages prepared by the Construction Manager.
4. The Construction Manager will solicit, advertise, accept, review, and award bids to qualified subcontractors, based on the bid packages identified.
5. The Construction Manager will justify in writing to the Owner, the use of any prequalified subcontractors that are not the apparent low bidder.

6. The Construction Manager will contract with all subcontractors, material suppliers and equipment suppliers necessary for the proposed construction works.
7. The Construction Manager will coordinate with the engineer and Owner's representative to schedule and conduct preconstruction meetings with subcontractors.
8. The Construction Manager will set procedures for cost and time control updates.
9. The Construction Manager will provide to the Owner along with the Guaranteed Maximum Price report, a summary indicating all subcontractor bids received which highlights the apparent low bidder upon which the GMP is based, and copies of all scope sheets for each bid package.

### **C. Construction Phase**

1. The Construction Manager will coordinate with school personnel to accommodate school related activities in areas of the campus not under construction.
2. The Construction Manager will be required to participate and require all subcontractors and suppliers to do likewise, in the district's 'Owner's Direct Purchase Program', communicating and cooperating with district staff and any additional contractors that the district may choose to employ.
3. The Construction Manager will coordinate all work with surveyors, special consultants and testing lab services contracted by the Owner as required.
4. The Construction Manager shall coordinate and schedule all required inspections prescribed in the building permit and Florida Building Code, including threshold inspections, and ensure work is not covered or concealed until the inspector has approved the work in place.
5. The Construction Manager shall immediately correct all identified deficiencies by the Owner's representatives, inspectors, engineer representatives, applicable municipal inspectors, and threshold inspectors.
6. The Construction Manager will coordinate site construction management services including but not limited to: (a) regular job site meetings, (b) maintain daily on site project log and schedule report, (c) oversee quality assurance testing and inspection programs, (d) monitor construction management staff and subcontractor work performance for deficiencies, (e) maintain record copy of all contract documents, (f) change orders and other documentation on site, (g) oversee construction management staff and subcontractor safety programs.
7. The Construction Manager shall provide to the Owner, monthly project cost accounting reports indicating the status of the subcontract buyouts, contingency expenses, project expenses, accounts payable, forecasted and conformed Owner expense changes, and forecasted savings within the Guaranteed Maximum Price.

8. The Construction Manager will staff this project in a satisfactory manner to accomplish the work as specified. As a minimum, the Construction Manager's site personnel during the construction phase will include: a project manager and project superintendent.
9. The Construction Manger will update and maintain the master project schedule, detailed construction schedules, submittal schedules, inspection schedules and occupancy schedules.
10. The Construction Manager will prepare a schedule of values associated with each bid package identified and submit for approval by the engineer and Owner's representative. All payment requests must be in accordance with the schedule of values approved.
11. The Construction Manager will process payment requests for approval by the engineer and the Owner's representative.
12. The Construction Manager will process any change orders for approval by the engineer including a cost estimate of the proposed change.
13. The Construction Manager will submit and process Requests for Information (RFI) and coordinate responses with the engineer.
14. The Construction Manager will provide construction program accounting and reporting documentation to the district as required.
15. The Construction Manager will monitor for the presence of existing asbestos containing building material and certify to the Owner that no asbestos containing material has been used in the construction of the project.
16. The Construction Manager will coordinate with the engineer the final inspection prior to the engineer's approval and issuance of the Certificate of Substantial Completion.
17. The Construction Manager will provide monthly progress reports to the Owner.

**D. Post Construction Phase**

1. The Construction Manager will coordinate project close-out, start-up and transition to operation.
2. The Construction Manager will coordinate with the engineer to provide a complete project records including project manual and CAD drawings corrected to show all construction changes, additions, and deletions compared to the Construction Document (CAD disks will be provided to the Construction Manager by the engineer).
3. The Construction Manager will coordinate with the Owner to prepare the Certificate of Final Inspection.



4. The Construction Manager will obtain and review for completeness, have corrected if necessary and submit to the Owner following the engineer's approval all warranties, operations and maintenance manuals, and other such documents.
5. The Construction Manager will coordinate and conduct the Building Warranty Inspection, and the roofing two year warranty inspection.
6. The Construction Manager will complete all punch list items generated by the engineer and Owner's representatives during their inspections.

## **SECTION 3 - INSTRUCTIONS TO SUBMITTING FIRMS**

### **A. General**

Seminole County Public Schools utilizes internet, electronic mail (E-Mail) as a format to quickly and accurately exchange information and strongly encourages all interested firms to do likewise. Addenda or subsequent information regarding this RFQ shall only be issued to those firms that have either 1) delivered a written, facsimile (407-320-0292), or E-Mail (susan\_cline@scps.k12.fl.us) request expressing their intention to respond to this RFQ to the Facilities Planning Office, attention: Ms. Susan Cline OR 2) have attended the presubmittal meeting and have recorded their name, firm they represent, address, phone & facsimile number and (if available) Internet E-Mail address on the presubmittal meeting attendance list (the attendee shall be solely responsible for ensuring his/her name is properly recorded on the attendance list).

This request for statements of qualifications is the first step in the selection process. A selection committee will review the submittals of interested firms. Short listed firms will be asked to present their qualifications and design approach by interview to the selection committee as part of the second step of the selection process. After interviews, the committee will make a recommendation to the School Board of Seminole County to negotiate with the top ranked firm to provide construction management at risk services, for the identified project.

### **B. Form of Qualification Submittal**

Submittals from interested firms will be accepted until 4:00 p.m., local time October 11, 2013, and must be received by mail or delivered in hand to the:

**Seminole County Public Schools  
Educational Support Center  
Facilities Planning Department  
Fourth Floor  
400 E. Lake Mary Blvd.  
Sanford, Florida 32773  
Tel (407) 320-0072**

Seven (7) sealed statements and an electronic disc copy (portable document format - .PDF) of the complete submittal package shall be clearly labeled showing the name of the submitting firm.

### **C. Expenses Incurred in Preparing Responses**

Seminole County Public Schools accepts no responsibility for any expenses incurred by those firms offering their services to the Board in the preparation of a response to either this Request for Qualifications or subsequent requests. All submittal expenses shall be borne by the offering firms/teams exclusively.

#### **D. Construction Manager's Qualifications**

Firms submitting a response to this Request for Qualifications must be licensed in the State of Florida as a Certified General Contractor (CGC) according to Chapter 489, Florida Statutes. Corporations must be registered in the State of Florida by the Department of the State, Division of Corporations, at the time of final selection by the Selection Committee.

#### **E. Insurance and Bonding Requirements**

Selected finalists will be required to show proof of insurance and bonding capacity. Insurance in the form of General Liability, and Worker's Compensation and Employers Liability will be required per Chapter 440, Florida Statutes.

#### **F. PreSubmittal Conference**

It is highly recommended that all interested firms attend the proposed presubmittal Conference set for 3:00PM, October 3, 2013, in in the school board meeting room (1st floor), at the

**Seminole County Public Schools  
Educational Support Center  
400 E. Lake Mary Blvd.  
Sanford, Florida 32773**

This meeting is the only opportunity to communicate with the Facilities Planning Department to clarify questions about the submittal or selection process.

**Note: All respondents are hereby cautioned not to contact any member or employee of the selection committee or School Board regarding this Request for Qualifications.**

#### **G. Firm Selection Process**

Members of the selection committee will evaluate the submittals. A "short-list" of firms will be identified. Further instructions will be forwarded to the short listed firms at that time. Firms that make the short list will be asked to interview with the selection committee. Firms will be ranked and the committee will forward its recommendations to the School Board of Seminole County for final approval. In general, the evaluation criteria is based on:

- Team ability and Qualifications
- Preconstruction Resources
- Experience In Related Educational Facilities Projects of Similar Scope
- Project Management Approach and Accounting
- Availability and References

The Selection Committee members are:

- School Board Member (non-voting)
- Business Advisory Board Member
- School Principal or designee
- School Community Representative
- Supervisor of Construction or designee
- Director of Facilities Services or designee
- Owners Construction Representative

## **H. Project Schedule**

The following dates and activities tentatively identify project schedule milestones:

- |  |  |
|--|--|
| • PreSubmittal Meeting                 | October 3, 2013                        |
| • Submittal Deadline                   | October 11, 2013                       |
| • Short Listing of Firms               | October 24-26, 2013                    |
| • Interviews / Selection               | November 18-24, 2013                   |
| • Board Approval of Ranking            | December 12, 2013                      |
| • Board Approval of Contract           | January 14, 2014                       |
| • Construction Phase 1 (Early Release) | March 11, 2014                         |
| • Construction Phase 2                 | June 10, 2014 through January 19, 2015 |

## **I. Project Locations**

Greenwood Lakes Middle School is located at 601 Lake Park Drive, Lake Mary, FL 32746.  
Geneva Elementary School is located at 275 First Street, Geneva, FL 32732.

*Note: All respondents are hereby cautioned not to contact the school staff for information or tours. Only short listed firms will participate in a guided tour of the sites prior to the interviews.*

## **J. Project Scope and Budget**

The total construction budget (including preconstruction services) for the Geneva Elementary School project is \$2.8 million. The total construction budget (including preconstruction services) for the Greenwood Lakes Middle School project is \$5.6 million.

*Note: Further information about the school and the proposed project will be provided to the shortlisted firms only. At this time, the committee is strictly interested in the firms' qualifications to provide CM services on these projects.*

## **SECTION 4 — QUALIFICATION STATEMENT FORMAT**

The following submittal format is intended to provide the Selection Committee with information regarding the qualifications of each proposing Construction Management firm. The proposal is limited to 50 informational pages (single-sided) and shall be presented in a 3 ring binder format. (Table of Contents, section dividers, etc. are not considered part of the 50 page limit.) The complete submittal package (including any reference letters) shall be copied and saved as one file onto a CD disc in PDF format. The disc shall be labeled and included in the sealed submittal package.

Letters of reference (or copies) on client letterhead shall be placed together in the back of the submittal package. These letters will not be included in the 50 page limit.

Proposals shall respond to each item of the request in the same order below.

### **A. Letter of Introduction**

### **B. Table of Contents**

### **C. Proposed Team**

Describe your proposed organizational structure for this project, indicating key personnel and their relationship to this project and other team members. Give brief resumes' of key persons to be assigned to the program. Clearly indicate personnel's previous project experience.

### **D. Firm Experience and Qualifications**

1. Type of organization for this project (corporation, partnership, other)
2. Length of time firm has been in business
3. Location of principal offices which will be responsible for implementation of this contract
4. Location of other offices from which resources may be drawn
5. Size, resources and capabilities of responding entity:
  - a) Organizational structure of business entity for this program (partners, associates, consultants, subcontractors).
  - b) Indicate the depth of staff and capabilities from within the organization that can be drawn upon as needed, to include, management, technical, and support staff.
  - c) Describe preconstruction services and support resources.

### **E. Project Experience**

List the projects for which your firm has provided/is providing construction management services which are most related to this project (K-12 public schools capital improvement

construction experience). List all K-12 construction projects contracted within the last five years. Highlight projects for elementary schools and/or mechanical system renovation projects. In determining which projects are more related, consider: related size and complexity; how many members of the proposed team worked on the listed project; and how recently the project was completed. List the projects in priority order, with the most related project listed first. For each of the listed projects, provide the following information:

1. Name and location of school program
2. The nature of the firms responsibilities/work activities, type of construction management services provided
3. Owner's representative name, address and phone number
4. The name and telephone number of the project engineer
5. Date completed
6. Size of program (area/square feet and type of facilities)
7. Cost of program (original Guaranteed Maximum Price and final construction cost)
8. Schedule Adherence
9. Identify successful dispute resolutions that were addressed.
10. Identify governing authorities over project and outline staff experiences with said agencies. Place special emphasis on experience with the Florida Department of Education

Included in these instructions is a "Performance Reference Survey" form to be completed for no less than three (3) of the project references listed. Submitting firms will ensure that each contact listed as a reference is given a copy of the form, and request the contact individual providing the reference to complete the form and send it via facsimile to Ms. Susan Cline, at fax 407-320-0292 prior to October 11, 2013.

#### **F. Methodology**

Applicant's cost control methods, scheduling methods, approach and plan for completing this project, and program for construction quality assurance and schedule adherence.

For two of the projects listed in project experience;

1. Describe the methods of cost control utilized and the resulting benefits.
2. Describe the way in which your firm developed and maintained project schedules. How did you develop schedules and how often were they updated. Provide examples of how these techniques were used. Include specific examples of scheduling challenges, and how your firm helped solve them. Submit an example of a project schedule.
3. Describe the types of records, cost and accounting reports, monitoring systems and information management systems that your firm used in the management of those projects. Provide examples of each report used.

4. Describe the way your firm maintained quality and budget control during the preconstruction and construction phases. Provide specific examples of how these techniques were used.

### **G. Current Workload**

List all projects currently under contract, including the dollar volume and percent complete at the time of this submittal

### **H. Financial Strength and Bonding Capability**

Provide a statement indicating financial capability of the firm to provide the resources required including:

1. A letter of intent from a surety company indicating the applicant's bondability for this project (performance and payment bond) for an amount at least equal to \$6 million, single project. To be acceptable to the Owner as surety for performance and payment bonds, a surety company shall comply with the following provisions:
  - a) The Surety Company must be licensed to do business in the State of Florida
  - b) The Surety Company shall have been in business and have a record of successful continuous operations for at least five years.
  - c) The surety Company shall have at least A.M. Best Company Policyholder's Rating of 'A-' and 'Financial Size Category' of Class VIII or higher.
2. Audited financial statements for the most recent two years, including income statement, balance sheet, statements of change in financial position and notes to financial statements. If audited financial statements are unavailable, provide similar un-audited statements.
3. Disclose any material changes in the business operations of the firm, including without limitation any bankruptcy proceedings, mergers, acquisitions, or spin-offs and any material pending or threatened litigation, which have occurred within the last five (5) years. If appropriate, discuss the impact of these changes on the firm's financial or managerial ability to perform the task under the proposed capital plan.
4. The name, title, address and phone number of the financial officer of the firm responsible for providing the information in response to this requirement 'G'.

*The financial information requested in items 2 and 3, and copies of any rating reports, are not included in the RFQ's 50-page limitation. The financial information shall be submitted as part of the application, but in a separately marked envelope entitled 'Confidential—proprietary financial information'. At proposer's request, this information will be returned after selection of successful proposal. Only one print sealed copy of the financial statement is required.*

## **I. Litigation**

Identify all litigation in which your firm has been a party to legal action (including arbitration, administrative proceedings, etc.) or lawsuits during the last five (5) years involving a single client for claims in excess of \$50,000. Include a brief legal description of the dispute and its current status. Where the action or lawsuit has involved an Owner, please describe the particular circumstances giving rise to the dispute and the actions that your firm took to attempt to settle the matter prior to and after suit being filed. Also, describe in detail any projects within the last five (5) years where liquidated damages, penalties, liens (in excess of \$50,000), defaults, cancellations of contract or termination of contract were imposed, sought to be imposed, threatened or filed against your organization.





# PERFORMANCE REFERENCE SURVEY

## FACILITIES PLANNING DEPARTMENT

Seminole County  
Public Schools

400 East Lake Mary Boulevard  
Sanford, Florida 32773  
407-320-0070

Fax: 407-320-0292

*SCPS RFQ Services Title:*

**Construction Management At Risk Services For HVAC System Remodeling  
Geneva Elementary and Greenwood Lakes Middle Schools**

The Seminole County Public School district is currently evaluating qualifications of various firms for the above indicated services and the below listed firm has listed you as a reference in performing similar services for your organization. Please take a few moments to complete the following survey and **FAX your response directly to the Facilities Planning Department at 407-320-0292** no later than **October 11, 2012**. Your assistance in providing this information is appreciated.

**The Next Line To Be Completed by The Firm Being Referenced:**

**Firm:**

**This Section To Be Completed by Reference Provider:**

What specific contracting services did this firm provide?

\_\_\_\_\_

Was the firm responsive to your needs and requests?  Yes  No

Was there good communication between the client and the firm?  Yes  No

Was the firm proactive in resolving problems and disputes?  Yes  No

Was the staff professional and knowledgeable?  Yes  No

Were the services completed on time and within budget?  Yes  No

Has this firm ever been awarded a repeat contract by your organization for similar services?  Yes  No

Would you award a contract to this firm again for similar services?  Yes  No

How would you rate the overall performance of the firm:

Excellent  Very Good  Satisfactory  Unsatisfactory

Comments: \_\_\_\_\_  
\_\_\_\_\_

Name of Person Providing Information:

Title:

Phone:

Company/Agency: