

ACCM CM QUALIFICATION COVER LETTER

Level II

{Date}

{Contact Name}

{Construction Management Firm Name}

{Address}

{City}, CA {Zip Code}

Re: Construction Management Services

Subject: Request for Qualifications

In accordance with Government Code Sections 4525-4529.5, the {District} is requesting qualifications for construction management services for the {construction/modernization/addition} of {project name(s)}.

A **description of the project(s)** and specific information regarding the schedule, budget, and delivery method are contained in **Section 1.1.A** of the RFQ/RFP Guidelines.

Each firm's Qualification Statement should respond to the **Qualifications** outlined in **Section 1.1.B** of the Guidelines. Additionally, each firm should be prepared to address the level of service and the management techniques and approach for executing the **Proposed Services** outlined in **Section 1.2** of the Guidelines. The district will evaluate each Statement of Qualification based on the information provided in response to Section 1.1B and Section 1.2 of the Guidelines. Each Statement of Qualification shall include a cover letter including the name, title, address, phone and facsimile numbers for the contact individual.

Firms submitting qualification statements must submit {number} copies of the statement no later than {time} on {date}. Late submissions will not be accepted. Statements of qualification shall be limited to {number} pages and shall be prepared at the expense of the submitting firm.

The {district} reserves the right to accept or reject any or all qualification statements.

Send all questions, correspondence, and qualification statements to:

{Name} – {Title}

{District Name}

{Address}

{City}, CA {Zip Code}

Telephone {Number}

Facsimile {Number}

Electronic Mail {Address}

End.

(LEVEL 2)

ACCM CONSTRUCTION MANAGEMENT RFQ/RFP GUIDELINES

1.1 REQUEST FOR QUALIFICATIONS

A. Description of project or projects:

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 school will include approximately **<number>** buildings totaling approximately **<number, if available>** square feet, including **<administration, classrooms, multipurpose/locker, mechanical, etc>** spaces.

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

2. Proposed Schedule

- a. A **<mandatory/non-mandatory>** Pre-Qualifications Conference is scheduled on **<date>** at **<time>** and will be held at the **<exact room/area>** located at **<address, city, state>**.
- b. Qualifications packages are to be received at **<exact room/area>**, located at **<address, city, state>**, no later than **<time>** on **<date>**.
- c. A shortlist of qualified firms will be determined by **<date>** and interviews will be scheduled for the week of **<date>**.
- d. 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>**.
- e. Preconstruction services will begin immediately upon execution of contract.

Bidding of the project and subsequent construction is contingent on matching state funds apportionment by the State Allocation Board, estimated within **<time>** of CM selection.

3. **Project Costs:** The total budget for **<project(s) name(s)>** is **\$<amount>**, which includes soft costs and construction costs. **(Example)**
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)**
5. **Delivery Method – Multiple Prime or CMGC:** The district desires the successful CM firm to provide multiple prime construction management services in cooperation with the district and architect.
6. **Nature of the Award-Single/Multiple Project:** The intent of the District is to award contract(s) for **<each or all>** project(s) listed in this Request For Qualifications.

B. Qualifications:

1. **Legal Entity:** Describe the legal entity under which your organization operates:
 - 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.

- b. 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.
 - c. Sole Proprietor; provide the date of organization and the name of the owner.

- 2. **Business Experience and Licensing:** Describe the business experience of your organization:
 - a. Indicate the year your organization was founded under the present name.
 - b. List any other or former names under which the organization has operated.
 - c. Indicate the number of years your organization has practiced Construction Management.
 - d. If your organization operates from more than one location, indicate the office from which the proposed project will be served.
 - e. Indicate the qualifying contractors license or professional registration number.

- 3. **Construction Experience and References:** Describe the construction experience of your organization:
 - a. Provide a list of school projects currently in progress or under contract and specify the delivery method.
 - b. Provide a list of school projects completed in the last five years and specify the delivery method.

Note: For each project, indicate the project name, description of facility, location, owner, owner contact name and phone, architect contact and phone, construction cost, start date, completion date.

- 4. **Insurance Certificate:** Provide a copy of your current certificate of insurance listing all coverage

- 5. **Team Members:** Identify the construction management team members for this project and describe each individuals role in the project:
 - a. Provide an organizational chart for the firm.
 - b. Provide an organizational chart for the project.
 - c. Include a resume for each project team member outlining specific qualifications and experience.

- 6. **State and Local Agencies:** Describe your organizations familiarity with the procedures and requirements of the following state and local agencies and their approval process:
 - a. Office of Public School Construction
 - b. Department of State Architect
 - c. Department of Toxic Substance Control
 - d. California Department of Education

- 7. **DVBE:** Describe your organizations experience and procedures for administering Disabled Veteran Business Enterprise requirements:

- 8. **Litigation/Arbitration/Termination with Owner:** 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.

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

1.2 REQUEST FOR PROPOSALS

A. Proposed 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. **Site Evaluation:** Consult with District staff in relation to the site selected or to be selected. Assist with DTSC and CDE site approval processes.
 - b. **Plan Review: Value Engineering and Contractibility:** 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.
 - c. **Master Budgeting and Scheduling:** Provide master budgeting and scheduling services including the identification of anticipated project revenues and expenditures based upon traditional project milestones.
 - d. **Detailed Construction CPM Schedule:** Produce detailed construction CPM schedule to be incorporated into the project documents including identification of the project critical path.
 - e. **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.
 - f. **Bidding Strategies:** Consult with District staff regarding bidding strategies with an emphasis upon timing, development of alternates, and bid package scoping.
 - g. **Project Accounting and Management Systems:** In concert with District staff, develop the project accounting and budget management systems.
 - h. **General Conditions Document preparation:** The District should adopt General Conditions documents that are appropriate for Multiple Prime contracts.
 - i. **Project Scoping:** Multiple Prime Construction Management requires that the project be divided into logical categories of work.
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.
- 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.
- f. **Contract Documents:** Prepare contract packages for District review. Distribute and monitor completion of these contract packages.
- g. **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 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 Prevention Plan:** Ensure that Storm Water Pollution Prevention Plan is initiated, and maintained.
- d. **Agency Interface:** Provide agency interface during construction process.
- e. **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.
- f. **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.
- g. **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.
- h. **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.

- i. **Interim Housing:** Schedule and coordinate District interim housing requirements so as to minimize disruption to both the construction progress and any ongoing District activities.
- j. **Document Control:** Establish and implement procedures for submittals, change orders, and requests for information. Maintain logs, files, and other necessary documentation.
- k. **Shop Drawings & Submittals:** Review and monitor the status of shop drawings and related correspondence.
- l. **Administration of the Construction Contracts: SUPERVISION:** Manage, supervise and coordinate all construction activities in accordance with the Construction Documents and project schedule. Provide on site management of the project as necessary. Maintain on a daily basis an onsite project log.

Administration of the Construction Contracts: MANAGEMENT/ADMINISTRATION: Ensure that District requirements regarding certified payrolls and subcontractor and material supplier releases are carried out.

- m. **Change Order Review:** Establish and implement a change order processing system that provides review of scope, price, and added contract time.
- n. **Contractor Claims:** Evaluate and mitigate all claims for additional cost or time due to any alleged cause.
- o. **Verified Reports:** Process and forward all verified reports to the Architect for submission to DSA.
- p. **Project Meetings:** Coordinate and attend weekly job-site progress meetings with the District, Architect, Inspector of Record, and Prime Contractors if and when needed.
- q. **Insurance Certificates:** Monitor Prime Contractor insurance certificates for coverages, endorsements, limits, and expiration dates.

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

- a. **Relocation and move in:** 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. **Punchlists:** Develop punchlist of defective work. Create a punchlist schedule for completion. Verify completion of punchlist items.
- d. **As-Built Documents:** Review contractual requirements for As-Built Documents and crate procedures.

- 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 Lien 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.