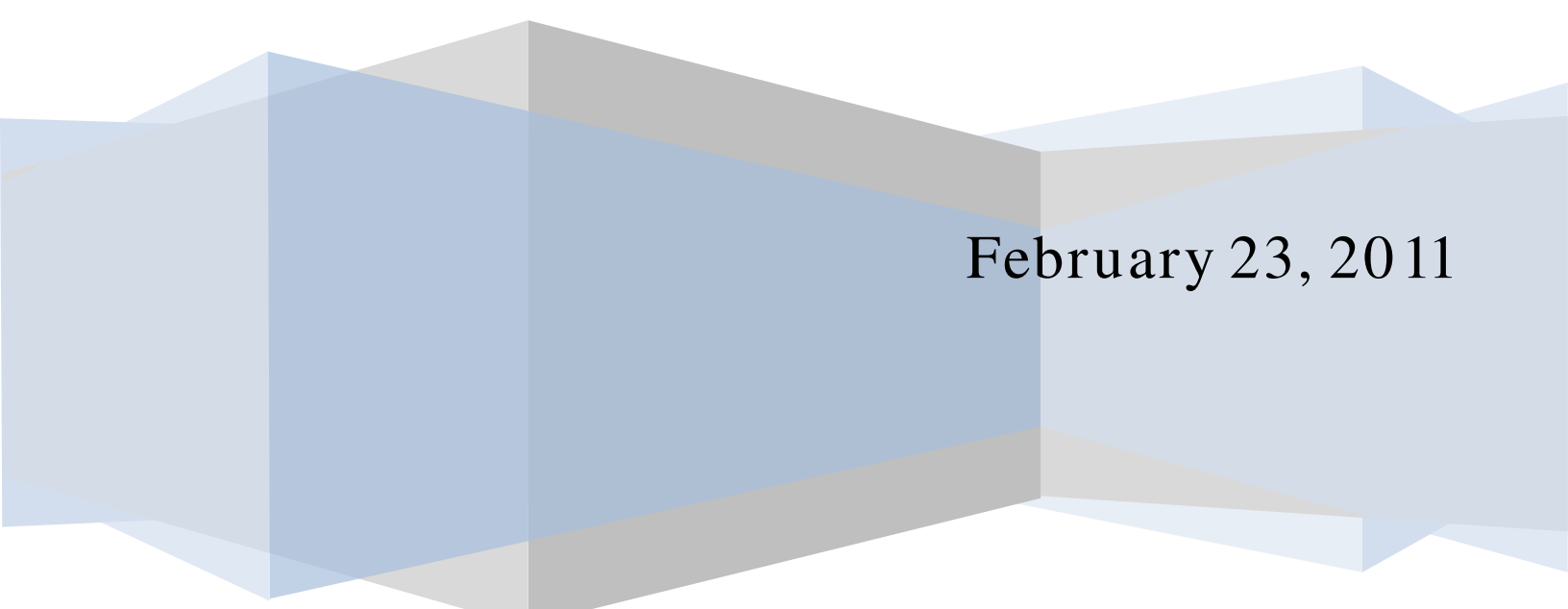


SAN GABRIEL UNIFIED SCHOOL DISTRICT

**REQUEST FOR PROPOSAL
CONSTRUCTION AND
PROJECT MANAGEMENT
SERVICES**

RFP NUMBER 10 0 5



February 23, 2011

SAN GABRIEL UNIFIED SCHOOL DISTRICT
San Gabriel, California

**REQUESTS FOR PROPOSALS (“RFP”) FOR
CONSTRUCTION AND PROJECT MANAGEMENT SERVICES**

February 23, 2011

The San Gabriel Unified School District is engaged in \$65,000,000 in ongoing new construction and modernization projects associated with the passage of a local Government Obligation Bond Measure, approved by the voters in November 2007.

Accordingly, the District is requesting proposals from qualified firms, partnerships, corporations, associations, or professional organizations to provide comprehensive, professional construction management/project management services to the District in accordance with the information and criteria set forth herein. Extensive California public school experience is sought from candidates submitting proposals in response to the RFP, in addition to other criteria and qualifications as set forth herein.

Proposals shall be in accordance with the “Format for Proposal Submission” as set forth in Section II, below, and must be submitted **NO LATER THAN WEDNESDAY, MARCH 16, 2011, BY 4:00 P.M., to Susan Celaya, Director, Purchasing.** Late proposals will not be considered. Each proposal shall be treated as confidential until this deadline, after which time each proposal shall become a matter of public record.

The District’s evaluation of the RFP is solely for the purpose of determining which construction/project management companies are deemed responsive, responsible and qualified to work on public works projects. Construction/project management companies will be reviewed by the District based upon the submitted proposal and any other information available to the District. The District may request a construction/project management company to submit additional information pertinent to the review process. The District also reserves the right to investigate and rely upon information from other available sources in addition to any documents or information submitted by the construction/project management company.

The District retains the sole discretion to determine issues of compliance and to determine whether a construction/project management company is responsive, responsible and qualified.

The District’s decision will be based on the evaluation of several criteria including, but not limited to the following:

- Successful experience with DSA
- Successful experience with California K-12 projects
- Successful experience with modernization and new construction projects
- Experienced personnel

Each proposal must be complete. Incomplete statements will be considered non-responsive and grounds for disqualification.

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In addition, a construction/project management company may be automatically disqualified for any one of the following:

- Falsification of information
- Lack of DSA experience
- Lack of relevant experience
- Lack of responsiveness
- Lack of California K-12 experience

The District reserves the right to reject any or all proposals and to waive any irregularities in any response received.

In order for the District to make an informed decision regarding selecting a construction/project management company among responsible and responsive candidates, your proposal must contain the following described elements or evidence that the candidate meets or exceeds the requirements stated herein.

Proposals must consider and respond to the following which shall not be construed as a comprehensive list of all potential services to be provided by the construction/project management company:

I. SCOPE OF WORK

A. GENERAL

1. Work with District staff, the architects, consultant, contractor prequalification consultant, contractor, sub-contractor(s), the District’s Long-Range Facilities Master Plan Oversight Committee, and all other required agencies for the successful completion of all assigned projects, as applicable;
2. The construction/project management company selected will be precluded from performing architectural services;
3. Assist the District in development and implementation of a project phasing plan (i.e. temporary housing, relocation, move-in plan, etc.); and
4. Work with the District in the coordination and quality control of all project documentation. Prepare progress/status reports for cost, schedule, quality, etc.

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Reports are required throughout the duration of the project to be submitted on a monthly basis (or as needed) for review by the District.

5. Provide a comprehensive project schedule with sufficient detail to guide the District and all consultants in a timely completion of the project goals.

B. PRECONSTRUCTION PROJECT MANAGEMENT PHASE

1. Develop, design, implement and coordinate the District Project Management Manual, Policies and Procedures;
2. Assist and work with the District relative to performing both a “Value Engineering Analysis” and “Constructability Review” of the design and contract documents, with the objective of identifying document variances and deficiencies prior to bid;
3. Work with District architects so that a complete detailed final cost estimate for purposes of budget verification can be established;
4. Based on the final cost estimate from the District’s architect, if cost overruns develop, work with the District and its architects in developing alternative bidding strategies or other alternatives to reduce costs to comply with any budget constraints; and
5. The construction/project management company shall work with the District in **preparation of construction bid documents and define, prepare and package construction bid documents.** Work with the District’s architect in developing project-specific special conditions, including, but not limited to, provisions for contract time, interim and final completion milestones and construction phasing requirements. If requested, the construction/project management company shall assist District’s legal counsel to develop and prepare any contract documents.

C. BID/AWARD PHASE

1. Develop, implement, and monitor the San Gabriel Unified School District’s Project Stabilization Agreement for School Construction and Major Rehabilitation in its **efforts to generate local bidder participation in the construction program, (zip code specific hiring of suppliers, craft workers, and apprentices) and provide information regarding upcoming projects to local bidders;**

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2. Coordinate and assist the District in the generation of “Notice to Bidders” for projects entering the bid process. The District shall place public advertisements for upcoming project bids as required by law;
3. Advise the District as to the form and content of the Invitation for Bids, the form of Construction Sections, the form of General Conditions, the Supplementary Conditions, the Special Conditions, the proposed format for the Construction forms, and other items to include in the contract for consideration;
4. Coordinate and conduct, in conjunction with the District and its architect(s), in project pre-bid conference(s);
5. Assist the District and its consultant(s) to document and formally respond to bidder inquiries. Work with the architect to issue addendum documents for bid packages, as necessary. Advise the District of cost, schedule and construction impacts resulting from the inclusion of addendum documents for bid packages;
6. Assist the District and its consultant(s) with the development of a standardized pre-qualification process and bidding procedure for projects;
7. For the benefit of the District and with the advice and assistance of the Architect, the Construction Manager will receive bids, prepare bid summaries and make recommendations to the District for award of construction contracts or rejection of bids;
8. Assist the District and the District’s architect in the issuance of the Notice of Award and Notice to Proceed for each construction contract;
9. Evaluate, re-package and re-bid packages that are not consistent with the budget;
10. Prepare bid packages to ensure all work specified by the Architect is included in the appropriate bid package and that jurisdictional or scope disputes between bid packages are eliminated; and
11. The Construction Manager shall not be a bidder on any individual contract for construction within the Project.

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D. CONSTRUCTION MANAGEMENT PHASE

1. The construction/project management company shall be fully experienced in the coordination of construction projects utilizing identified construction delivery methodologies;
2. In conjunction with the District and the District’s architect, coordinate and conduct project pre-construction conferences;
3. The construction/project management company shall maintain complete files of all project documentation which shall include but not be limited to the following: design documents, estimates, bid documents, construction contracts, payment invoices, requests for information (“RFIs”), contractor’s submittals and shop drawings, change orders, claims, schedules, and correspondence;
4. Serve as the District’s representative along with other consultants, including the District’s architects, for the administration of the construction contract(s) as provided under the General Conditions of each project(s). When appropriate, make recommendations to the District for exercising the District’s prerogatives under the construction contract(s) for the project(s);
5. Implement and coordinate a “DISTRICT Project Management Manual – Policies and Procedures.” The construction/project company shall adopt standard procedures for document control and formats for the following: documents including but not limited to, bid documents, contract documents, payment invoices, schedules, program status reports, requests for information (RFI), change orders, claims, etc. The construction/project company must develop a cost loaded multiple project schedule detailing all project activities and also implement logging and tracking all project related information, including but not limited to contracts, payments, correspondence, and cost worksheet data;
6. Schedule and conduct all regular job-site progress meetings, transcribing and distributing meeting minutes;
7. Assist in obtaining building permits and special permits (if needed in the jurisdiction) for permanent improvements, excluding permits required to be obtained directly by the various contractors;

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8. Ensure that safety programs are developed by each of the contractors as required by the Contract Documents and that same are submitted to the District for review and approval;
9. Along with the project architect, coordinate activities with the District’s Inspector(s) of Record (IOR) for each project and other technical inspection and testing agencies. File and distribute as appropriate all inspection reports. The construction/project management company is precluded from providing IOR services;
10. Receive and review the Contractor’s detailed cost-loaded baseline construction schedule for conformance to the contract requirements. Receive and review the Contractor’s detailed “Schedule of Values” for front end loading and compliance with contract requirements. Distribute the approved schedule to the District, the District’s architect, and other involved parties;
11. Utilize the Contract’s approved baseline schedule and schedule of values to establish, update, maintain and distribute the project schedule;
12. Receive and review the Contractor’s monthly schedule update and progress payment request. Review and confirm monthly Contractor payment requests with District architect(s) and IORs. Review the progress of construction and observe work in place and stored materials and evaluate the percentage complete of each activity shown on the contractor’s construction schedule. Identify with the contractor any current or potential delay(s) to the completion schedule, and require appropriate contractor corrective action, including submittal or recovery schedule(s), where appropriate or advisable. Review certified payroll and verify compliance with applicable (e.g., administrative) guidelines, as requested or directed by District;
13. Work with the District’s architect in the evaluation of contractor change order proposals (“Change Orders”) for time and costs, and make recommendations for District action. Assist the District architect in the negotiation of Change Order cost and time extensions, and requirements for documenting Change Orders, and document packaging pertaining to Change Orders. Provide project cost estimating, as requested by District;
14. Prepare, file, and distribute Project Status Reports as requested by the District on a monthly basis. Prepare and distribute logs reflecting current status of Change Orders, claims, contractor submittals, shop drawings, and RFIs;

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15. Perform a claim entitlement analysis of all contractor claims, including but not limited to, an analysis of the impact on cost(s) and project schedule, and prepare recommendations to the District and District architect regarding appropriate action and response to contractor claims. If requested by the District, negotiate claims from the Contractor on the behalf of the District, including recommendations concerning settlement, in conjunction with and subject to recommendations of District legal consultants;
16. Coordinate the receipt and storage of District-furnished, contractor-installed materials and equipment;
17. Assist and coordinate with the District architect(s) and IOR a “punch list” of items pending substantial and final completion of a project(s). Verify to District and District architect the contractor(s) completion and corrective action for each punch-list item, and recommend actions in event of contractor’s failure to take corrective action or other necessary actions relative to said punch list;
18. Schedule, coordinate and assist the District in the occupancy of the competed project or portions thereof.

E. CONTRACT CLOSE-OUT

1. In association with the District’s architect(s), receive and review operations and maintenance manuals, and warranties and guarantees as required under contract provisions;
2. In association with the District’s architect(s), receive and review project record drawings and as-builts, and assist the District in the foiling of these documents with the District; (Note: format of record drawings to be determined);
3. Coordinate and schedule training sessions for District personnel and verify that the Contractor’s obligations are fulfilled;
4. Make a final review of the project(s) in conjunction with the District’s architect and IOR at the conclusion of all corrective action. Provide a report to the District indicating whether the work is acceptable under the contract documents (including any addenda or change orders), and recommend final payment and the recordation of a notice of completion in conjunction with the District’s architect and other District representatives or staff.

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5. Assist the District and the District’s architect in the preparation and submittal of the final accounting and closeout report(s) including (but not limited to) all Department of State Architect (“DSA”), California Department of Education (“CDE”) and State Allocation Board (“SAB”)/Office of Public School Construction (“OPSC”) forms as may be required or needed.

F. POST CONSTRUCTION FOLLOW-UP

1. Provide the District and District architect with one (1) year post construction follow-up for Contractor warranty and guarantee items.

II. FORMAT FOR PROPOSAL SUBMISSION

A. GENERAL INSTRUCTIONS

All proposals are to be submitted in compliance with the format as set forth below and in the order as outlined to facilitate evaluation by the District of the candidate’s ability to meet or exceed the specified requirements under the heading “Scope of Work.”

Each proposal shall be presented in a bound 8-1/2 inch by 11-inch (vertical) format. Submit **one (1) original with wet signature** and **two (2) copies** of each proposal. All submittals shall be tabbed for easy referral to the numbered answer. All submittals shall become the property of the District and will not be returned.

Clarifications or questions regarding submittals must be submitted in writing to Susan Celaya, Director of Purchasing, via facsimile (626) 451-5495 or email (celaya_s@sgusd.k12.ca.us), **no later than seven (7) workdays prior to proposal opening at close of workday.** Questions will be answered in writing and transmitted to each respondent by facsimile, e-mail or regular mail, as determined by the District.

B. FORMAT REQUIREMENTS

The proposal shall follow the sequence as noted below:

1. **Cover Page:**
 - a. Name of Firm
 - b. Project Title – Proposal for Construction/Project Management Services
 - c. Date Submitted – mm/dd/yy

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PLEASE ANSWER THE FOLLOWING:

2. Information with respect to firm:

- a. Name, address, telephone and fax numbers, web site, and e-mail address of firm;
- b. State of license or registration;
- c. Name, title, telephone, fax, cell phone numbers and e-mail address of primary contact person;
- d. Legal form of firm (i.e. corporation, partnership, etc.). Please state the year your firm or organization was established;
- e. Number of principals in the firm;
- f. Number of employees;
- g. Provide a short resume of your firm’s principals, including registrations/licenses and state (Please limit to one page per person);
- h. Short resume of key personnel that will be assigned to this project, including position. (Please limit to one page per person); and
- i. Each resume must address the following:
 - (i) Name and Firm;
 - (ii) Project-specific responsibilities and description of work to be performed;
 - (iii) Estimated percentage of the individual’s time that will be devoted to the project;
 - (iv) Specific qualifications;
 - (v) Years with the firm;
 - (vi) Number of projects of similar nature performed by subject of resume;
 - (vii) Position held and responsibilities on work of similar nature; and
 - (viii) Education. Licenses held, qualifications, etc.
- j. Provide information to show that your proposed team has suitable resources available to ensure satisfactory completion of the work.
- k. Provide information that your company possesses the required license(s) under Government Code section 4525(e).

3. Identify all K-12 public school modernization and/or new construction projects managed by you and/or your firm in the past five (5) years, in the following format. Please include the following information for each project:

Name of project and district
Contact person and telephone number at district
Person in charge of project
Construction delivery method
Dollar value of project (include design, construction and administration)

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Original and final budget amount for project
Provide all information regarding change orders or other construction cost adjustments relative to each project listed
Involvement of identified key personnel
Describe in full the services provided by your firm

4. Please indicate the construction/project management experience your firm has with respect to the following:
 - a. Construction phasing plan
 - b. Relocation plan for essential equipment and personnel
 - c. Information technology
 - d. Value engineering
 - e. Schedule management
 - f. Pre-construction
 - g. Construction
 - h. Phasing around existing facilities
 - i. Equipment replacement/reconfiguration
 - j. Budget management
 - k. Management and environmental consultant(s)
 - l. Division of the State Architect (DSA), Office of Public School Construction (OPSC), State Allocation Board (SAB), Department of Toxic Substance Control (DTSC), and California Environmental Quality Act (CEQA)
 - m. Implementing and monitoring compliance of a Project Stabilization Agreement or Project Labor Agreement on project or program

5. Briefly describe how your firm would plan to work with the District and their consultants, representatives and/or agents as Construction/Project Manager in the following areas:
 - a. Adhering and enhancing the approved projects to be carried out for the renovation of the facilities’ needs
 - b. Assisting architect and/or engineering firms in public contract compliance (especially with respect to remaining within budget, adhering to schedules, and with respect to project deliverables)
 - c. CEQA and local agency (i.e. city or county) general plan compliance
 - d. Construction phasing to coincide with facility needs
 - e. Handling changes needed during any of the above phases
 - f. Maintaining environmental needs (HVAC, lighting, electrical, etc.) during the renovation and construction period

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- g. Claims evaluation and response, participation in advising mitigation of adverse (or potentially adverse) impacts and dispute resolution (identify type, e.g., arbitration, mediation, etc.); allocating responsibility for claims to various trade contractors including pass-through claims;
 - h. Re-sequencing of trades on a multiple-prime project to minimize delays and potential claims;
 - i. Managing and coordinating the public works bidding process
 - j. Handling bid protests
 - k. Developing schedules for multiple-prime projects and process for preparing schedules at bid time, once contracts are awarded and handling updates and revisions during construction;
 - l. Enforcing compliance with a Project Stabilization Agreement or Project Labor Agreement; and
 - m. Interfacing with multiple governmental agencies/departments
6. Briefly describe how your firm develops and monitors accurate project design and construction schedules, financial budgets, and cost estimates. Please include methods and philosophy for cost control and change order management for both design and construction phases, as well as construction claims dispute resolution.
7. Confirm that your firm agrees that all documents and files (in all formats and media) prepared or created by your firm related to the District’s projects or program shall be, and remain the property of the District, and that your firm will provide all documents and files upon written request of the District.
8. Describe and provide information regarding your firm’s knowledge and experience in the construction and management of education facilities relative to energy efficiency, sustainability, sustainable products, green technology and safety. Please also provide information on your firm’s experience with the following and provide specific examples and projects with other school districts and your firm’s roles and responsibilities:
- a. LEED certification;
 - b. Collaborative for High Performing Schools (“CHPS”);
 - c. California Green Building Standards Code;
 - d. “Green” buildings and construction
 - e. Power Purchase Agreements;
 - f. Direct Purchase Agreements; and
 - g. Energy Management Services Contracts.

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9. Insurance Coverage. Each submittal must include a copy of the respondent’s Certificate of Insurance. This may be marked confidential and included with the “original” (wet signature) proposal. The firm or organization shall be required to carry the following insurance:
 - a. Comprehensive General Liability and Property Liability Insurance, with a minimum limit one million dollars (\$1,000,000);
 - b. Comprehensive Automobile Liability Insurance, including owned, non-owned, and hired vehicles with minimum limit one million dollars (\$1,000,000);
 - c. Workers’ Compensation and Employer Liability, statutory limit;
 - d. Professional Liability Insurance with minimum one million dollars (\$1,000,000) per claim per annual aggregate. Deductible not to exceed \$25,000 each claim;
 - e. All insurance policies shall be independent and not merely contributory to other insurance maintained by the District, and shall be endorsed naming San Gabriel Unified School District as an additional insured; and
 - f. All insurance must be issued by an insurance provider by an admitted carrier (licensed to do business in the State of California), carrying a rating of not less than A- in the most current A.M. Best’s insurance Guide – Property Casualty or otherwise acceptable to Owner.

10. Provide a complete list of construction related litigation within the past five (5) years involving your firm. Include the names of the participants and a contact person and phone number. Indicate whether your firm or any predecessor firm has filed for protection under the United States bankruptcy code within the last seven (7) years. If so, provide the name of the court where filed, the case title, and the disposition of the case. Proposals failing to provide the requested information of lawsuits of litigation or claim will be considered non-responsive and will not be evaluated.

11. Include additional brochures, promotional information as desired and attach to the preceding information, which you feel may assist the District in evaluating your proposal.

12. Proposals should be typewritten, concise, straightforward, and must address each requirement and question.

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13. The District reserves the right to negotiate modifications with any firm as may be required to serve the best interests of the District and to negotiate the final contract(s) with the most qualified candidate(s).
14. All proposals will become the property of the District. Information in Proposals will become public property and subject to disclosure laws. The District reserves the right to make use of any information or ideas in the proposal. All proposals will be maintained as confidential working papers until officially placed on the Governing Board meeting agenda.
15. The District reserves the right to reject any and all proposals and to waive any informality in any proposal received. No obligation, either expressed or implied, exists on the part of the District to make an award or to pay any costs incurred in the preparation or submission of a proposal. All costs associated with the preparation or submission of proposals for this RFP is solely the responsibility of the candidates.

III. BUDGETARY ESTIMATE OF FEES:

1. Provide a fee schedule for the work described in this RFP. Define the compensation for your services most often used (i.e., fixed fee, percentage, etc.). Address each of the following:
 - a. Please list what is included in your fee; what is excluded?
 - b. How do you propose to handle general conditions costs, fees? Provide a list of proposed or typical general conditions.
 - c. Is your fee based upon total project duration or a fixed time? What costs will you seek if a project is delayed?
 - d. Does your fee include change orders?
 - e. Provide a list of anticipated reimbursable items with approximate rates and markups.

Enclose a detailed firm rate sheet. List applicable staffing rates and other anticipated costs and conditions.

NOTE: Proposers are instructed not to contact District Governing Board Members, the District Superintendent or other District personnel and/or consultants not mentioned in this RFP. Failure to observe this criteria will result in disqualification of proposer.

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ALL RESPONSE MUST BE RECEIVED NOT LATER THAN WEDNESDAY, MARCH 16, 2011 BY 4:00 P.M.

LATE PROPOSALS WILL NOT BE ACCEPTED. PROPOSALS SUBMITTED BY FACSIMILE OR ELECTRONICALLY WILL NOT BE ACCEPTED.

IV. DISTRICT’S EVALUATION PROCESS

The Proposals will be evaluated based on each firm’s qualifications, approach, methodology and relevant experience with similar school districts and facility projects. The District will further evaluate the firms based on their performance history, proposed team members, knowledge of the various issues, technical capabilities, proposed fees and overall responsiveness to this RFP. The following factors are important for further consideration and evaluation which shall not be construed as a comprehensive list:

1. Technical competence
2. Staffing capabilities
3. Project approach and planning
4. Past performance record
5. Quality control/assurance
6. Cost control and reporting
7. Best management practice
8. Breadth and depth of response
9. Professional reputation of firm
10. Satisfaction of current/prior clients
11. School modernization/construction experience
12. Accuracy of firm’s cost estimates
13. Proven experience related to construction management responsibilities

V. INTERVIEWS

VI. FINAL DETERMINATION AND AWARD