

The School District of
Osceola County

*Facilities Planning and
Construction*

RFQ

Request for Qualifications Procedures

For

Construction Management Services “At Risk”
For New Elementary School “I”

The School District of Osceola County

Request for Qualifications

And

Evaluation Procedures

Construction Management Services “At Risk”

RFQ # SDOC-05-068-FPC

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SECTION I

A. Introduction

This document shall serve to provide interested parties with specific information as to the Procedures for Selection of Construction Management where the method of compensation is a Negotiated Fee on a Guaranteed Maximum or other methods of compensation depending upon the scope of services. Pursuant to 235.211 Florida Statutes, 1994 Supplement, and the Florida Consultant's Competitive Negotiation Act, Section 287.055 Florida Statutes, the School Board of Osceola County, Florida, will consider the contracting of a Construction Manager to provide professional services for:

New Elementary School "I"

The School District of Osceola County is seeking expressions of interest for Construction Management Services to work with the Department of Construction Services and the selected Architect of Record on the projects described above. The projects shall be "AT RISK" contracts with the Construction Management firm responsible for all scheduling and coordination and is generally responsible for the successful, timely, and economical completion of the project.

Business entities interested in providing Construction Management services to the School Board of Osceola County are hereby notified that a sealed Qualifications Statement for providing the required services must be received by 11:00 AM, local time April 11, 2005, at the office of the Purchasing Department 817 Bill Beck Blvd. Kissimmee, FL 34744

Instructions for completion and submission of the Qualifications Statement may be obtained free of charge at the School Board of Osceola County, Attention Lisa Kesecker Purchasing Department 817 Bill Beck Blvd. Kissimmee, FL 34744

To demonstrate capability for performance of the required services, interested firms must reply with copies of qualifications, past experience and samples of brochures, materials, etc., which support previous efforts of a similar nature. Information must also be furnished indicating the identification of the Construction Management Team. Replies must include current AIA Form A305.

This general information application packet shall serve to provide interested parties with general information as to the procedures for selection of construction management services for School District of Osceola County.

The School Board of Osceola County reserves the right to waive any formalities in the selection process and to reject any or all Statements of Qualification.

B. **General Instructions**

1. The response shall be submitted in a sealed package addressed to:

RFQ # SDOC-05-068-FPC
The School District of Osceola County
Attn: Lisa Kesecker, Purchasing Specialist
Purchasing Department
817 Bill Beck Boulevard, Building 2000
Kissimmee, FL 34744

Phone # (407) 870-4622

2. Five (5) copies of the response must be furnished on or before the stipulated deadline. Response must arrive at the addressed listed in Item 1, no later than 11:00 A.M. E.S.T. to be considered.
3. Standard Form AIA A305 shall contain a manual signature of an authorized representative of the firm.
4. Any questions concerning the Request for Qualifications shall be directed to Lisa Kesecker, CPPB - Purchasing Specialist, at phone # (407) 870-4622 or by email at keseckel@osceola.k12.fl.us.
5. Applicants that do not comply with the School Board's Procedures or deadlines established will not be considered. The School Board will retain all application information received. Responses received after the stipulated date and time will not be accepted and will be returned unopened to the Applicant. Applications that do not comply with the instructions set forth and/or do not include the Qualifying Information required, may be considered incomplete and may be rejected.
6. The School Board is not liable for any costs incurred by the Applicants prior to the issuance of an executed contract.
7. Applicants responding to this RFQ must be available for presentations/interviews by the Selection Committee and School Board in person at the School District Administrative Center as established under Project Milestones.
8. The contents of the proposal of the successful Applicant will become part of the contractual obligations.

9. All information submitted by Applicants is subject to the Laws of Perjury as set forth in Chapter 837, Florida Statutes. In the event an Applicant is found to have committed perjury, such Applicant shall be ineligible for consideration for future Projects. The minimum qualifying information outlined in Sections I and II is required to be submitted by an Applicant to be eligible for consideration by the Committee and the School Board. In order to facilitate review by the Committee, Applicants are requested to respond and index their submittals with the same paragraph notations as in Section II, Qualification Statement Format.
10. Proposals must be typed or printed. All corrections made by the Applicant prior to the opening must be initialed and dated by the Applicant. No changes or corrections will be allowed after proposals are opened.

C. **Project Descriptions**

The School District of Osceola County intends to award a contract to the one company, which is deemed most qualified and responsive to this request. The scope of required services under the proposed contracts will include full construction management services for construction of the facilities mentioned below.

1. Management of Construction

The successful firm will be responsible for the construction management of the project described below. The services required for the construction program may include, but are not limited to the following:

- a. Enter an “At Risk” contract with all sub-contractors, materials suppliers and equipment suppliers necessary for the construction of said facility.
- b. Schedule and conduct pre-construction meetings.
- c. Provide continuous on site construction management services throughout the construction phase. This management shall include, but not be limited to:
 - (1) Regular job site meeting.
 - (2) Maintain daily on-site project log and schedule report.
 - (3) Oversee quality assurance testing and inspection programs.
 - (4) Monitor construction management staff and subcontractor work performance for deficiencies.
 - (5) Maintain record copy of all contract documents change orders and other documentation on site.
 - (6) Oversee construction management staff and subcontractor safety programs.

- d. Develop, update, and maintain master project schedules, detailed construction schedules, submittal schedules, inspection schedules and occupancy schedules.
- e. Process payment requests for approval.
- f. Report potential budget and schedule variances and prepare recovery plans.
- g. Coordinate surveyors, special consultants and testing lab services contracted by owner as required.
- h. Administer post construction closeout, start-up and transition to operation.
- i. Provide construction program accounting and reporting to the district as required.
- j. The construction management firm will be required to work with the architect of record and school district contract administrator on the project and submit pay requests for approval, issue RFI's when necessary, and assist the owner and architect as required for the timely completion of the project.
- k. The construction management firm will be required to work with and coordinate their activities with any third party contracts or contractors that the school district provides for any of the Projects.
- 1. The school district may elect to include additional services to assist the district in implementing and managing its capital improvement and construction program.

2. Elementary School "I" - Project Description:

Estimated Construction Budget - \$13,500,000.00

Comprised of mainly Two Story Buildings

Number of Student Stations - 1,088

Approximately 126,000 square feet

Architect for this Project will be: Schenkel Shultz Architecture, Inc.
 Contact Person: Rita Watson, AIA
 200 E. Robinson Street, Suite 300
 Orlando, FL 32801
 Phone # 407-872-3322

D. **Project Milestones**

	Legal Advertisements
February 18, 2005	Legal Advertisement Orlando/Osceola Sentinel
February 23, 2005	Legal Advertisement Orlando/Osceola Sentinel
February 27, 2005	Legal Advertisement Orlando/Osceola Sentinel
April 11, 2005	Responses to RFQ due before 11:00 A.M. Location: School District of Osceola County Purchasing Department Attention: Lisa Kesecker 817 Bill Beck Blvd., Bldg 2000 Kissimmee, FL 34744
April 18, 2005	First Selection - Review of Qualifying Information Submittals for compliance with RFQ Requirements; Selection of Short List
April 22, 2005	Notification of Selected Short Candidates (Minimum of (3) Applicants)
April 29, 2005	Short List Oral Presentations and Interviews Presentations will be presented before the Selection Committee and possibly the School Board. Location: The School District of Osceola County TBA 817 Bill Beck Boulevard Kissimmee, Florida 34744 Time: 8:00 a.m. to 12:00 p.m.
May 17, 2005	School Board Meeting ; Ratification of Ranked Finalists Posting of Ranked Finalists

E. **Development of Short List**

1. The Selection Committee shall meet to review the Responses to the RFQ for compliance with the requirements and provide an objective evaluation of all Applicants. The Committee's initial evaluation of Applicants shall be on the basis of the specific Project needs, and the professional services offered by the Applicant as stated in the Qualifying Information submitted. Responses are reviewed based upon a weighted factor, 100 percent being the total, in accordance with the criteria listed below:
 - a. **Related Project and Firm Experience (20%)** - The performance of each Applicant with respect to projects comparable in type, size and complexity, as the applicable Project shall be evaluated for the most recent ten-year period. Applicants may submit any information they deem appropriate for evaluation of past performance with projects similar in nature as the one under consideration by the district.
 - b. **Scheduling and Cost Control (15%)** - The firm's scheduling system and cost control system should be described. Methods for assuring subcontractors adherence to schedule should be highlighted. A comparison of the firms' project profile should indicate their ability to hold to original schedules and budgets.
 - c. **Financial Strength and Bonding Capability (15%)** - The Applicant's financial capability is to be expressed in the financial statement, and should indicate the resources and the necessary working capital to assure financial stability through the completion of the project. The financial capability shall also include the bonding capacity of the firm if the applicant anticipates an "AT RISK" contract. The firm shall be required to hold a 100% Performance and Payment Bond on the basis of the Guaranteed Maximum Price furnished pursuant to Section 255.05 F.S. for each project.
 - d. **Proposed Team (20%)**

Office Staff - This parameter expressed the general and specific project related capability of the in-house staff and indicates the adequate depth and abilities of the organization, which the Applicant can draw upon as needed. This will include management, technical, and support staff.

On-Site Staff - Similarly, the ability and experience of the field staff will be evaluated with specific attention to project related experience.
 - e. **Approach to Construction Management (10%)** - Among other items explain your approach to inspections, quality assurance, and cost control.

- f. **Methodology (10%)**
- g. **Distance to Site (5%)** - What is the primary location of the firm's office, which will have direct day-to-day responsibility for this project?
- h. **Overall Qualification Statement (5%)**
How well did the applicant respond to RFQ directions? Is the material organized and presented clearly? Is information applicable to the School District of Osceola County?

F. **Interviews (100 points total)**

After the firms have been evaluated based on their written applications, a minimum of three (3) firms with the highest scores will be more closely considered through a presentation of their approach to perform this particular project. Time will be allowed for questions and answers after the presentation. The selected firms will be expected to address the following:

1. **References (5%):**
The recommendation of previous owners and architects.
2. **Knowledge of the State Requirement for Educational Facilities (SREF) and Typical School District Procedures (10%):**
The firms should demonstrate their knowledge of SREF, local codes and ordinances, and an understanding of how school districts operate in the State of Florida.
3. **Proposed Project Staff and Functions (15%):**
The firms should name the actual staff to be assigned to this project, describe their ability and experience and portray the function of each within their organization and their proposed role on this project. The staff should be present at the interview.
4. **Insurance Program (5%):**
5. **Overall Approach and Methodology (15%):**
The firms should demonstrate verbally and/or graphically their plan for performing this project, documenting the services to be provided and showing the interrelationship of all parties.

6. **Cost Control/Value Engineering (10%):**
As part of its services, the firms should indicate knowledge and experience in the evaluation of building systems, construction techniques and the recommendations of materials to create an optimum value in meeting the design requirements.
7. **Scheduling Projects (20%):**
As a part of the project approach, the applicants should propose a scheduling methodology for effectively managing and executing the work in the optimum time. The firm should indicate their procedure for scheduling and for compliance controls. The firms should describe any representative current projects and the projected, versus the actual, schedule of each.
8. **Overall Factor (20%):**
This is the opinion of the selection committee, taking into account all weighted factors, which applicant can perform the services in the best interest of the School District of Osceola County.

G. **Terms and Conditions:**

1. The School Board reserves the right to accept or reject any proposal in the best interest of the School District.
2. The School District reserves the right to award the contract to the next most qualified firm if the successful firm does not begin the contracted services within the prescribed fifteen (15) days or if an acceptable fee can not be negotiated.
3. The successful firm shall not discriminate against any person in accordance with federal, state, or local law.

H. **Selection Process:**

1. In order to minimize the possibility of unethical pressures or influences on the recommendations of the Selection Committee, appointments will not be made public until interviews (with the Short Listed Applicants) are imminent. The goal of this committee is to assess the Applicants on an equitable basis. All contacts and/or communication shall be made with Lisa Kesecker, CPPB – Purchasing Specialist for Facilities Planning and Construction. All prospective companies are hereby cautioned not to contact any School Board Member of the School District of Osceola County, nor to attempt to persuade or promote through other channels.

2. The Selection Committee will review all proposals received on time, and determine the firms with the highest score using the selection criteria established for the project.
3. The Selection Committee will receive presentations or conduct phone interviews of the highest scoring firms (minimum of three) and will establish ratings for each firm in accordance with the scoring criteria established for this project.
4. Once the School Board has ratified the final rankings, the School Board shall engage, or authorize one or more persons to engage, the highest ranked Finalist, or Designated Finalist as the case may be, in negotiations for purposes of executing a Contract. In so doing, the School Board or its designee shall determine and negotiate compensation that is fair, competitive, and reasonable for the Services to be supplied.

Should the School Board or its designee be unable to negotiate a satisfactory contract with the highest ranked Finalist, or Designated Finalist as the case may be, at a price the School Board or its designee determines to be fair, competitive and reasonable, the School Board or its designee shall formally terminate negotiations and then undertake negotiations with the next highest ranked Finalist, or Designated Finalist as the case may be. Failing accord with the second most qualified firm, the School Board or its designee shall formally terminate negotiations with such firm and then undertake negotiations with the next highest ranked Finalist.

5. Each professional service contract entered into the School Board shall contain a prohibition against contingent fees as follows: “The Construction Manager /General Contractor warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for the CM/GC to solicit or secure this agreement and that it has not paid or agreed to pay any person, company, corporation, individual, or firm, other than a bona fide employee working solely it any fee, commission, percentage, gift, or other consideration contingent upon or resulting from the award or making of this agreement.” For the breach or violation of this provision, the School Board shall have the right to terminate the agreement without liability and, at its discretion, to deduct from the contract price, or otherwise recover, the full amount of such fee, commission, percentage, gift, or consideration.

SECTION II

Qualification Statement Format

The response to this request for qualifications must be presented in the following order and format and shall not exceed 50 pages including charts, pictures, tab sheets, dividers and covers.

A. LETTER OF INTRODUCTION

B. TABLE OF CONTENTS

C. BRIEF INTRODUCTORY NARRATIVE

1. Provide brief introductory narrative highlighting the overall qualifications contained in the total qualification package, maximum one page.

D. PROJECT EXPERIENCE

List the projects for which your firm has provided/is providing construction management and/or general contracting services, which are similar in scope to this project. List all construction projects contracted within the last ten years. 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. Overall Project Experience
 - a. Name and location of the project
 - b. Nature of the firm's responsibility on this project
 - c. Project Owner's representative name, address and phone number
 - d. Project User Agency's representative name, address, and phone number
 - e. State date - completion/anticipated completion date
 - f. Size of project - gross area of construction, number of facilities, etc.
 - g. Cost of project - construction cost
 - h. Project type - new construction; remodeling/renovation
 - i. Work for which staff was responsible
 - j. Present project status - percentage of completion

- k. Listing of Project Manager and other key professionals on listed project. Of this staffing, identify personnel assigned to this project.
 - l. The name, address and telephone number of the project architect.
 - m. Why was Construction Management chosen for each project?
 - o. Indicate traditional CM responsibilities or CM at Risk.
2. Please indicate what experience the firm, its subconsultants and proposed staff, have had with education projects and Florida DOE projects.

E. FIRM EXPERIENCE AND QUALIFICATIONS

- 1. **Business Structure** - Corporation, Joint Venture, or Partnership. Submit copy of State of Florida Department of State records indicating when corporation organized, corporation number, and date and status of most recent annual report. Applicants submitting applications as joint ventures shall submit a copy of their joint venture agreement. If a joint venture or prime/subcontractor arrangement of two firms, indicate how the work will be distributed between the partners.
- 2. **Time in Business** - Length of time firm has been in business under same name.
- 3. **Principal Office Location** - Location of principal office, which will be responsible for implementation of this contract.
- 4. **Other Office Locations** - Location of other offices from which resources may be drawn.
- 5. **Capabilities** - Size, resources and capabilities of responding entity:
 - a. Organizational structure of business entity for this program (partners, associates, consultants, sub-contractors, other participation).
 - b. Indicate the depth of staff and capabilities from within the organization, which can be drawn upon as needed, to include management, professional technical, and support staff.
- 6. **Licenses and Certificates** - Copies of current State of Florida professional registration license renewal for the Applicant (Corporate and all key professional personnel) to be used on the Project. An Applicant shall be properly registered to practice in the State of Florida with the appropriate state board governing the services offered. The Committee may verify the

current status with the appropriate state board. Provide copies of current State of Florida Department of Professional Regulation Construction Industry Licensing Board certificate of Corporate Authorization showing (1) License No., (2) Certificate of Authorization date and (3) designation of professional(s) qualifying the corporation to practice as a General Contractor.

F. SCHEDULING AND COST CONTROL

Provide narrative responses to the following questions and statements:

1. Describe your use of computer-generated schedules for the management of construction?
2. To what level of detail should a construction schedule be defined? How do you schedule the processing of shop drawings?
3. How do you coordinate development of schedule information from subcontractors?
4. State experience in handling crew loading and coordinated construction scheduling.
5. State your experience in cost loading of schedules.
6. Attach a sample schedule which best illustrates your overall scheduling capabilities.
7. Describe your experience with a contract where your scheduling required coordination with another major contractor hired by the Owner on the same site.

G. FINANCIAL STRENGTH AND BONDING CAPABILITY

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

1. For “At Risk” Contracts - Evidence of bonding capacity and ability to obtain multiple performance and payment bonds for projects, which total in excess of \$20,000,000. 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 admitted 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 Policy holder's Rating of "A+ or A" and "Financial Size Category" of Class VII or an equivalent rating from the Insurance Company.
2. The rating, if any, which exists on the senior debt of the firm from a national statistical rating service (Moody's, S & P, etc.), and include copies of rating reports on outstanding debts.
 3. Audited financial statements for the most recent three 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 unaudited statements.
 4. Disclose any material changes in the business operations of the firm, including without limitation any pending bankruptcy proceedings, bankruptcies, receiverships, mergers, acquisitions, stock acquisitions or spin-offs which have occurred within the last three (3) years and any material pending or threatened litigation. If appropriate, discuss the impact of these changes on the firm's financial or managerial ability to perform the noted tasks under this contract.
 5. The name, title, address and phone number of the financial officer of the firm responsible for providing the information in response to this question "G".
 6. 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 client for claims in excess of \$100,000. Include a brief legal description of the dispute and its current status. Where the action or lawsuit has involved a guaranteed maximum price contract, please describe the particular circumstances giving rise to the dispute and the actions which your firm took to attempt to settle the matter prior to and after suit being filed.
 7. Describe in detail any projects within the last three years where liquidated damages, penalties, liens, defaults, cancellations of contract or termination of contract were imposed, sought to be imposed, threatened or filed against your organization.

NOTE: Proposers wishing to preserve the confidentiality of the information requested by this question should provide a separate envelope labeled “Confidential - proprietary financial information.” This information will not be counted as part of the 50-page maximum document requirement.

H. **PROPOSED TEAM**

Describe your proposed organizational structure for this program, 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.

1. Office Staff
 - a. Name and title
 - b. Job assignment for other projects
 - c. Percentage of time to be assigned full time to this project
 - d. How many years with this firm
 - e. How many years with other firms
 - f. Experience
 - (1) Types of Projects
 - (2) Size of projects (dollar value SF of project)
 - (3) What were the specific project involvements?
 - g. Education
 - h. Active registration
 - i. Other experience and qualifications that is relevant to this project
 - j. Note which projects were fast tracked
2. On Site Staff
 - a. Name and title
 - b. Job assignment for other projects
 - c. Percentage of time to be assigned full time to this project
 - d. How many years with this firm
 - e. How many years with other firms
 - f. Experience
 - (1) Types of projects
 - (2) Size of projects (dollar value and SF of project)
 - g. Education
 - h. Active registration (R.A., P.E., G.C., etc.)
 - i. Other experience and qualifications that is relevant to this project
 - j. Note which projects were fast tracked

3. Describe the capabilities of your staff to provide the technical services required for:
 - a. Options analysis
 - b. Design review
 - c. Budget estimating
 - d. Value Engineering
 - e. Life cycle cost analysis
 - f. Construction Scheduling
 - g. Quality control (Design & Construction)
 - h. Constructability analysis
 - i. Cost control
 - j. Change Order negotiation
 - k. Claims management
 - l. Project close-out
 - m. Transition planning
 - n. Security systems
4. For Office Staff and On-site Staff - Show the organization chart as it relates to the project indicating key personnel and their relationship. It should be understood that it is the intent of the District to insist that those indicated as the project team in this RFQ response actually execute the projects.
5. Develop a chart of individual staff members to be assigned responsibilities.

I. APPROACH TO CONSTRUCTION MANAGEMENT

Applicant's understanding and approach to implement and carry-out construction management services.

1. Applicant shall present a plan setting forth the approach and program for implementing and carrying-out construction management services; information management systems, document control, records management, procurement of equipment and supplies, stimulating bidding by and engagement of local trade contractors, project status reporting and project administrative services.
2. Applicant shall describe his safety program, safety record, and safety litigation record as a contractor and/or construction manager.

3. Describe how the organizational structure will ensure orderly communications, distribution of information, effective coordination of activities, and accountability.

J. METHODOLOGY

Applicant's scheduling methods, approach and plan for implementing construction management services, and program for construction quality assurance and schedule adherence.

For three of the projects listed under project experience, draw parallels between these projects and the new Elementary "I" school project in the following areas:

1. Describe the way in which your firm developed and maintained project schedules. Include specific examples of scheduling challenges, and how your firm helped solve them. Submit an example of a project schedule.
2. Describe the types of records, reports, monitoring systems and information management systems, which your firm used in the management of those projects. Provide examples of each report used.
3. Describe the way your firm maintained quality control during the preconstruction and construction phases. Provide specific examples of how these techniques were used.
4. Describe specific construction management services you have provided and how they have helped the client in terms of cost, quality, schedule, safety, etc.

K. DISTANCE TO SITE - What is the primary location of the firm's office, which will have, direct responsibility for this project?

L. STANDARD FORM AIA A305 – This information will not be counted in the 50-page maximum document requirement.