Construction Management at Risk Services for Various Chicago Public Schools

Package 2



Agenda

- Welcome
- CM Overview
- Procurement
 Requirements
- RFP Highlights
- Q & A

Introductions



Construction Management at Risk Services

The Construction Manager (CM) shall provide Construction Management at Risk Services to assist the PBC, the Architect of Record ("AOR") and CPS with pre-construction activities, coordination, scheduling, development of a complete budget, estimating and budgeting the probable construction costs for each project and at each design milestone, overall management of the design team, and construction planning.

The CM will also be responsible for reviewing the design documents for constructability, identifying possible cost savings, and supporting the PBC and the AOR to develop a permitting strategy and obtain all necessary permits and approvals. Additional responsibilities may include, but not be limited to: Acquisition of Furniture; Fixtures, and Equipment; Project Management; Planning and coordination of all end user relocations necessary to complete the Project; Project Control; Change Management; Reporting; Document Management; Collection, Review, and Approval of Project Warranties; Collection, Review, and Approval of Shop Drawings and As-Built Drawings; Commissioning.

Trade Contract Award & Management

- The CM will administer the pre-qualification procedures and manage the bid and award process.
- The Construction Manager shall collaborate with the AOR to assemble bid packages for trade subcontracts to be bid.
- The Construction Manager shall schedule and administer a public bid opening for each trade subcontract, with the supervision and participation of the PBC.



Considerations

- Project descriptions, scope, and schedule
- Design documentation
- System narratives
- Specification Table of Contents
- Phasing plans
- Traffic studies
- Geotechnical reports
- ESA Phase I reports
- Roofing reports
- Boundary surveys
- Cost Form







renovation



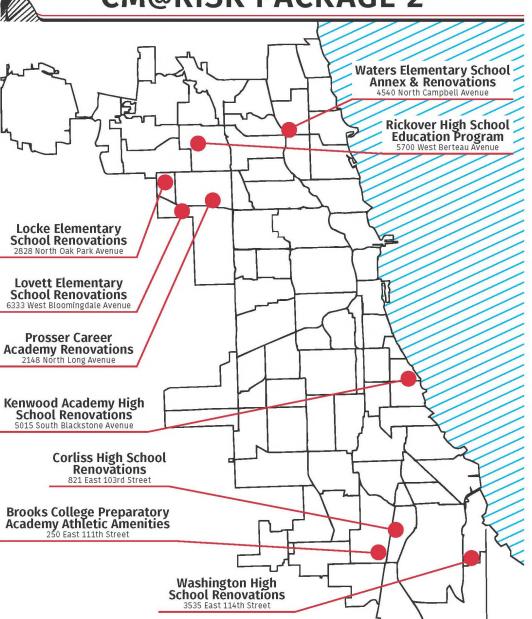






annex

PUBLIC BUILDING COMMISSION CM@RISK PACKAGE 2



9 Projects

Procurement Timeline



Issue RFP	December 18, 2018
Addendum 1 issued	January 11, 2019
Addendum 2 issued	January 17, 2019
Addendum 3 issued	January 18, 2019
Pre-Submission Conference	January 23, 2019
Submission Deadline Janu	uary 28, 2019 at 3PM
Target Award February 2019	PBC Board Meeting

Procurement Details

Requests for Information:

 Send to Public Building Commission of Chicago, Attn: Patricia Montenegro, Contract Officer by email: patricia.montenegro@cityofchicago.org.

Documents related to this solicitation:

- http://www.pbcchicago.com/opportunities/rfp-forconstruction-management-at-risk-services-for-variouschicago-public-schools-package-2/
- Front Desk Reception 50 West Washington, Suite 200, Chicago, IL 60602

Number of Copies:

- 1 signed, bound original copy; and
- 2 signed, bound copies; and
- Submit 7 USB Flash Drives, each with a single, searchable PDF file of your submission; and
- 1 single-sided, bound copy of Financial Statements

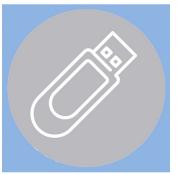
RFP SUBMISSION REQUIREMENTS 1 Bound Original

- ORIGINAL stamp visible
- No spiral binding
- Organized with tabs





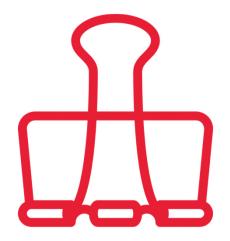


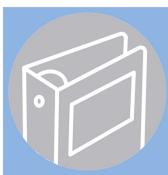


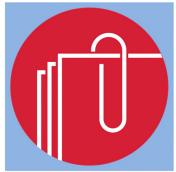


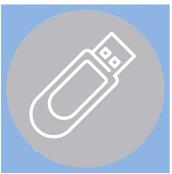
RFP SUBMISSION REQUIREMENTS 2 Double Sided, Unbound Copies

- Binder clip or paper clip
- Organized with tabs or divider pages





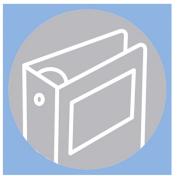






RFP SUBMISSION REQUIREMENTS 7 USB Drives

- 7 USB drives, each with a single, searchable PDF of your entire submission
- PDF File Name: SU_YourFirms'Name_CMARServicesat VariousCPSSchoolsP2PS3025_RFPresp onse_YYYYMMDD.pdf
- Sealed in separate envelope





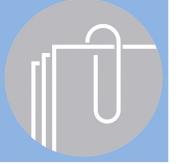




RFP SUBMISSION REQUIREMENTS Financial Statements

- 3 years of financial statements
- Marked as CONFIDENTIAL
- Sealed in separate envelope

















RFP SUBMISSION REQUIREMENTS

1 Envelope or Other Package

1 bound original, 2 copies,7 USB drives, 1 finance packetClearly labeled:

ABC Firm 123 Signage Lane Chicago, IL 60601



Public Building Commission 50 West Washington Street Room 200 Chicago, IL 60602

Attn: Patricia Montenegro

PBC RFP for Construction Management at Risk Services for Various Chicago Public Schools (Package 2) - PS3025

Submission Checklist

TAB 1

Complete Front Page of RFP

Cover Letter

Table of Contents

TAB 2

Technical Competence and Past Performance (Form A)

TAB 3

Project Approach and Methodology

TAB 4

Qualifications and Experience of Key Staff (Form B)

Resume

Organization Chart

TAB 5

Licenses and General Information

Disclosure Affidavit (Form C)

Legal Actions (Form D)

Disclosure of Retained Parties (Form I)

Affidavit of Non-Collusion (Form J)

TAB 6

Insurance Certificate

TAB 7

Safety (Form F)

TAB 8

QA/QC Plan

TAB 9

Project Scheduling

TAB 10

References (Form G)

TAB 11 (if applicable)

MBE/WBE, EEO, CRO, and CH Participation (Form E)

Joint Venture Affidavit (Form K)

Joint Venture Agreement

TAB 12

Proposal Acknowledgment and Acceptance (Form H)

Cost Form (per Project)

FINANCIAL STATEMENTS - Submit in a separately Sealed Envelope

Evaluation Criteria

Criteria	Percentage
Technical Competence and Past Performance	25%
Project Approach and Methodology	20%
Qualifications of Key Staff	10%
Financial Capacity	5%
Price	20%
MBE/WBE Past Participation and Commitment	15%
References	3%
Responsiveness	2%

RFP Highlights

Technical Competence and Past Performance

FORM A - TECHNICAL COMPETENCE AND PAST PERFORMANCE

Please complete a form for each project identified. A total of three (3) is required.

PROJECT NO					
Project Name:	Project Name:				
Project Type:	New Constru	ction Renovation	Other:		
Agency/Client:					
Agency Type: Public Private Respondent's Role: Construction Manager at Risk General Contractor Sub Contractor Other:					
Please describe you management? Trad		he project. (ie What porti	ion of the work did your firm self-per	form? Was it strictly	
	Has t	he project achieved final	acceptance after January 1, 2015?	Yes No	
			Original Contract Value:	\$	
Was project completed on budget? (If no, please explain below or attach explanation.)					
			Final Contract Value:	\$	
Was	project complete	ed on schedule? (If no, ple	ease explain below or attach explanation.)	Yes No	
		If applicable, did I	Project receive LEED Certification?	Yes No	
Level of LEED Certi	ification:				
Was the project per (If no, please explain be city/town/village and pe	elow or attach expla		lentify below the type of permit, the	Yes No	
Type of Permit:		New Construction Other:	Easy Cons	truction	
City/Town/Village, S	State:				
Permitting Body:					

*Resumes: Respondents shall demonstrate the experience and past performance of individuals identified on the Project Team in providing pre-construction, bidding and procurement, and construction management services.

*Organization Chart: Respondents must submit proposed organization chart indicating Key Staff Member's potential roles and responsibilities on the Project at each stage: Pre-Construction, Bidding/Procurement & Construction.

For purposes of this RFP, all Respondents shall provide a narrative incorporating the requirements noted above and complete FORM B - Key Personnel. Submit resumes for each individual. Narrative should be limited to one (1) Page.

Resumes should be limited to two (2) pages.

FORM B - KEY PERSONNEL

	Please complete a form for each Key Staff Member.				
	KEY PERSONNEL				
Role:	Pre-Construction: Project Manager Estimator MEP/Technical Coordinator Constructability Reviewer/Manager Bidding/Procurement: Project Manager Procurement Manager Compliance/Diversity MBE/WBE Manager Construction: Project Executive Project Manager Superintendent Project Engineer				
Name:					
Title:					
	Number of years with the firm:				
PLEASE ATTACH RESUME					

FORM C - DISCLOSURE AFFIDAVIT

HISTORY AND OWNERSHIP OF RESPONDENT FIRM

The undersigned _____

Any firm proposing to conduct any business transactions with the Public Building Commission of Chicago must complete this Disclosure Affidavit. Please note that in the event the Contractor is a joint venture, the joint venture and each of the joint venture partners must submit a completed Disclosure Affidavit.

	Name			Tibe
and on behalf of ("Bidder/Proposer/Responden	t or Contractor") having be	en duly sworn und	der oath certifies t	ne following:
	R	ESPONDENT		
Name of Firm:				
Address:				
City/State/Zip:				
Telephone:			Facsimile:	
FEIN:			SSN:	
Email:				
Nature of Transaction:				

FORM D - LEGAL ACTIONS

I. LEGAL ACTIONS

If the answer to any of the questions below is YES, you must provide a type-written, brief description, and/or explanation on a separate sheet following this page. Each question must be answered.

Question	Yes	No
Has the firm or venture been issued a notice of default on any contract awarded to it in the last 3 years?		
Does the firm or venture have any legally filed judgments, claims (liquidated damages, or other), arbitration proceedings or suits pending or outstanding against the firm or venture or its officers?		
If the answer to the preceding question is "Yes", provide the requisite explanation on a separate sheet and enter the dollar amount of claims or judgments and the contract value of the contract on which the claim was filed		
Within the past 3 years has the firm or venture been a party to any lawsuits or arbitration proceedings with regard to any contracts?		
Within the last 3 years, has any officer or principal of the firm or venture ever been an officer or principal of another organization that failed to complete any contract as a result of termination, litigation, arbitration or similar matter?		
Has any key person with the firm or venture or its predecessor ever been convicted of or charged with any state or federal crime (excluding traffic violations), including but not limited to, embezzlement, theft, forgery, bribery, falsification or destruction of records, receipt of stolen property, criminal anti-trust violations, bid-rigging or bid-rotating?		
Has the firm or venture ever been temporarily or permanently debarred from contract award by any federal, state, or local agency?		
Within the last 3 years, has the firm or venture been investigated or assessed penalties for any statutory or administrative violations (including but not limited to MBE, WBE, EEOC violations)?		
Has the firm or venture ever failed to complete any work awarded to it?		

FORM E - MBE/WBE, EEO, CRO, and CH PARTICIPATION

SUBMITTING FIRM NAME:

Please identify and report compliance history for least three (3) projects completed over the last three (3) years for which work is/was performed by your firm (government experience preferred but not required). The experience of any member of the Respondent's team will be deemed responsive to this requirement (lead partners experience preferred.) Additionally, please complete the "Demonstrate Commitment" section below.

The PBC will be hosting outreach sessions, networking events, and community hiring intakes where the Respondent is expected to

Respondent must demonstrate commitment by affirming and acknowledging the PBC's MBE/WBE goals. If Respondent is not able to commit to the MBEWBE goal stated in the RFP, please submit a narrative requesting relief and explaining why Respondent believes that the goals cannot be achieved.

Respondent must demonstrate commitment by affirming and acknowledging the PBC's commitment to employ minority and women journeyworkers, apprentices, and laborers along with local/community residents on goals for each Project. If Respondent is not able to commit to EEO, CRO, and CH stated in the RFP, please submit a narrative requesting relief and explaining why Respondent believes that the goals cannot be achieved.

DEMONSTRATE COMMITMENT

PROJECT ONE			
nt Name:	TROOLET ONE		
t Contact:			
Contact Telephone:			
t Name:			
Total:			
mpleted:			

MBE/WBE PARTICIPATION

must provide evidence of past experience achieving commitments to utilize minority and women owned business Please fill in the boxes below.

\F. 0			
BE Goal	WBE Goal	Astual Upp	
%	%	Actual MBE	Actual WBE
0	74	%	%

EEO, CRO, and CH PARTICIPATION

it provide evidence of past experience achieving commitments to utilize minority and women jouryneyworkers, laborers. Additionally, Respondent must provide history of meeting city of Chicago (CRO) requirements and

Minority Workforce					
r	Minority Jouneryworker Actual	Minority Apprentice Goal	Minority	Minority Laborer Goal	Minority Laborer
	%	%	%		
1			70	%	%

Female Workforce Female Female Female Female				70	
Jouneryworker Goal %	Jouneryworker Actual	Apprentice Goal	Female Apprentice Actual	Female Laborer Goal	Female Laborer Actual
77	%	%	%	%	%

	City of Chicago and Com	married 19 c	% %
City of Chicago Goal %	City of Chicago and Com City of Chicago Actual	Community Hiring Workfore Community Hiring Goal	Community Hiring Actual

FORM F - SAFETY

I. SAFETY

Respondents should be able to demonstrate the quality of their overall safety program as evidenced by their history of citations, OSHA incident rate and Experience Modification Rate (EMR).

	SAFETY INFOR	MATION			
		anization have a safety program	m? Yes No		
	-	Month and year first implements			
Method of review of program.		nontra ana your mot impromone			
method of review of program.					
Please indicate whether regu	lar work site safety meetings a	re held and how frequently.			
B) 5 4 6 5 5 5 1 1 5 5 5 5 5 5 5 5 5 5 5 5 5 5			NA CON CONTRACT		
PLEASE PROVIDE A COP	Y OF THE TABLE OF CONTEN MANUA	TS FROM YOUR FIRM'S SAFET L	Y/LOSS CONTROL		
for workplace safety law viola		the period of the last three year	Yes No		
	ation for which your organization		-		
	The second second				
2. Summary of your pos	ition of the matter				
 Official resolution of v 	iolation				
		ation's OSHA reportable incide			
		mmaries for the last three years and ase attach Narrative Statement, if ne			
			7,7		
	r organization's NGCI current e	experience modification rate fac	etors ("EMRF") rating		
worksheet. (If this is greater than 3.0, please a	ttach your OSHA Form 300A Summ:	aries for the last three years and a wi	itten explanation to the		
(If this is greater than 3.0, please attach your OSHA Form 300A Summaries for the last three years and a written explanation to the qualification questionnaire. Please attach Narrative Statement, if necessary.)					
PLEASE PROVIDE NCCI RATING FOR THE PAST FOUR YEARS					
Year	NCCI Rating	Year	NCCI Rating		

FORM G - REFERENCES

Instructions:

Firms must provide at least three (3) references for the projects presented as a part of the firm's demonstrated experience and capacity. Please indicate the name of the company for which each reference is tendered in the *Reference Firm Name* box. Firms may submit more than the minimum number of required references or submit Reference Letters in lieu of completing this form. However, if submitting Reference Letters, the minimum information requested below must be provided in the letter. Please mark 'See Attached Reference Letter' in the space provided. Current Employees of the Public Building Commission of Chicago are prohibited from being included as valid references.

SUBMITTING FIRM NAME:				
	REFERENC	ES		
PROJECT NAME:				
Reference Firm Name:		Phone:		
Reference Name:		Email Address:		
Reference Role on Project:		Mailing Address:		
Submitting Firm's Role on Project:		See Attached Reference Letter:		
PROJECT NAME:				
Reference Firm Name:		Phone:		
Reference Name:		Email Address:		
Reference Role on Project:		Mailing Address:		
Submitting Firm's Role on Project:		See Att	ached Reference Letter:	

FORM H - PROPOSAL ACKNOWLEDGEMENT AND ACCEPTANCE

A. ACKNOWLEDGEMENT

The Contractor hereby acknowledges receipt of Request for Proposal for Construction Management at Risk Services for Various Chicago Public Schools (Package 1) Contract No. PS3021, including, but not limited to Addenda Nos. below (if any)

Addendum No.	Date of Addendum	Addendum No.	Date of Addendum

B. PROPOSAL ACCEPTANCE

IN WITNESS WHEREOF, the parties hereto have caused this instrument to be executed in two (2) original counterparts the day and year first above written.

FORM I – DISCLOSURE OF RETAINED PARTIES

Disclosure of Retained Parties

Pursuant to Resolution No. 5339, as amended by Resolution No. 5371, of the Board of the Public Building Commission of Chicago, the apparent low Bidder is required to submit a fully executed Disclosure of Retained Parties within five (5) days of receipt of notice that it is the apparent low bidder.

A. Definitions and Disclosure Requirements

- As used herein, "Contractor" means a person or entity that has any contract or lease with the Public Building Commission of Chicago ("Commission").
- 2. Commission contracts and/or qualification submittals must be accompanied by a disclosure statement providing certain information about any lobbyists whom the Contractor has retained or expects to retain with respect to the contract or lease. In particular, the Contractor must disclose the name of each such person, his or her business address, the name of the relationship, and the amount of fees paid or estimated to be paid. The Contractor is not required to disclose employees who are paid solely through the Contractor's regular payroll.
- "Lobbyists" means any person a) who for compensation or on behalf of any person other than himself undertakes
 to influence any legislative or administrative action, or b) any part of whose duties as an employee of another
 includes undertaking to influence any legislative or administrative action.

B. Certification

CE	LIIIC	ation			
Co	ntract	tor hereby certifies as follows:			
1.	This	is Disclosure relates to the following transaction:			
	a.	Description of goods or services to be provided under Contract			
2.	Nar	me of Contractor:			
3.		CH AND EVERY lobbyist retained or anticipated to be retained by the Contractor with rennection with the contract or lease is listed below. Attach additional pages if necessary.	espect	to or	in
	Che	eck here if no such persons have been retained or are anticipated to be retained:			

FORM J – AFFIDAVIT OF NON-COLLUSION

Affidavit Of Non-collusion

-	ATE OF ILLINOIS } SS UNTY OF COOK }
	, being first duly sworn, deposes and says that:
(1)	He/She is
	(Owner, Partner, Officer, Representative or Agent) of
	the Bidder that has submitted the attached Bid;
(2)	That Bidder is fully informed respecting the preparation and contents of the attached Bid and of all pertinent circumstances respecting such Bid;
(3)	Such Bid is genuine and is not a collusive or sham bid;

- (4) Neither Bidder nor any of its officers, partners, owners, agents, representatives, employees, or parties in interest, including this affiant, has in any way colluded, connived, conspired, or agreed, directly or indirectly, with any other Bidder, firm, or person to submit a collusive or sham bid in connection with the Contract for which the attached bid has been submitted or to refrain from bidding in connection with such Contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Bidder, firm, or person to fix the price or prices in the attached bid or in that of any other Bidder, or to fix any overhead, profit, or cost element of the bid price of any other Bidder, or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against the Public Building Commission of Chicago or any person interested in the proposed Contract; and
- (5) The price or prices quoted in the attached Bid are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the Bidder or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.
- (6) The Bidder is not barred from bidding as a result of having violated Illinois Criminal Code, 720 ILCS 5/33E-3 (Bidrigging), 720 ILCS 5/33E-4 (Bid rotating) or the Prevailing Wage Act, 30 ILCS 570/0.01 through 570/7.

(Signed)



- Schedule B
- Joint Venture Agreement

Certification Letter MBE/WBE

FORM K – JOINT VENTURE AFFIDAVIT

This form is not required if all joint venturers are MBE/Non-MBE or WBE/Non-WBE firms. In such case, however, a written This form is not required it all joint venturers are MBE/Non-MBE or WBE/Non-WBE firms. In such case, nowever, a write joint venture agreement among the MBE/Non-MBE or WBE/Non-WBE firms should be submitted. Each MBE/MBE joint venturer must also attach a copy of their current certification letter. A. Name of joint venture

- B. Address of joint venture
- C. Phone number of joint venture
- D. Identify the firms that comprise the joint venture
- Describe the role(s) of the MBE/WBE firm(s) in the joint venture. (Note that a "clearly defined portion of work"
- Describe very briefly the experience and business qualifications of each non-MBE/WBE joint venturer.
- E. Nature of joint venture's business

Compliance: MBE/WBE

*All projects undertaken by the PBC are closely monitored to determine compliance with MBE/WBE goals.

*MBE/WBE Goal per Location: 32% Aggregate



Compliance: Certification

PBC ensures that only certified and experienced firms perform the required services.

MBE or WBE firms must be certified with the City of Chicago and/or Cook County to receive credit as an MBE/WBE firm by the PBC.





City Residency & Compliance: Community Hiring

PBC encourages the creation of career opportunities for residents of a project's surrounding community areas, both in the construction trades as well as skilled and unskilled workers.

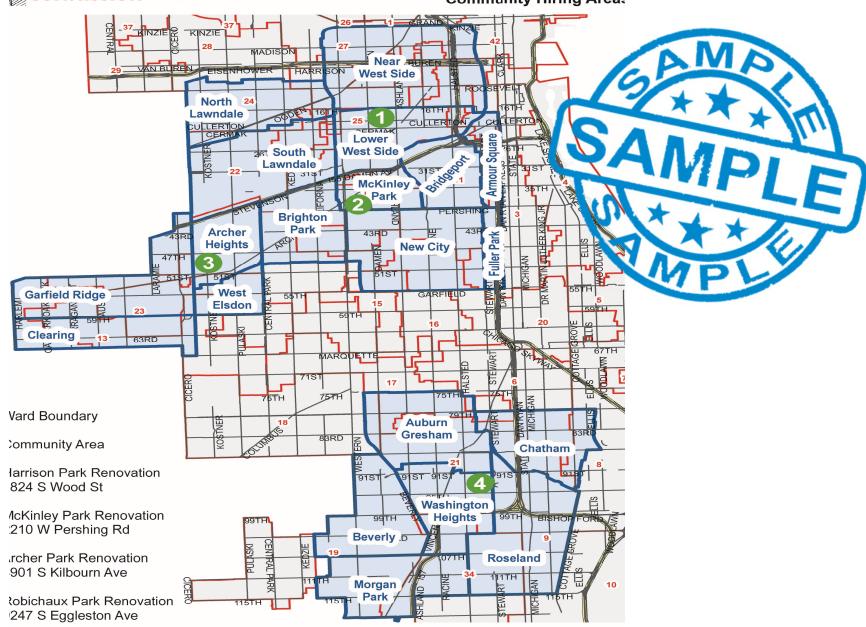
Typically, PBC has the following goals:

- Community hiring goal: at least 7.5% of project labor performed by community residents
- City residency goal: at least 50% of project labor performed by residents of the city of Chicago





Chicago Park District Project - Group E Community Hiring Areas



ward Criteria

To promote the intended goal of economic opportunity and maximize the use of minority personnel on this project, the Public Building Commission of Chicago has established the Award Criteria Figure formula for the purpose of evaluating proposals and awarding the contract. A contract in the amount of the Total Base Proposal (or Base Contract Price) will be awarded to the responsible bidder with the lowest Award Criteria Figure pursuant to Section III.P Basis of Award above. The Public Building Commission of Chicago reserves the right to check all calculations for accuracy. The fulfillment of the Award Criteria does not abrogate the responsibilities of the Contractor to comply with federal and state requirements under the Equal Employment Act and the Illinois Human Rights Act.

The Bidder shall complete the Award Criteria Figure Formula and transfer the final Award Criteria Figure - Line 15 to the space provided on the itemized proposal sheet. Failure to complete the formula may be cause for rejection of the Bidder's proposal. The successful bidder will be held responsible for adhering to the figures submitted in Lines 1, 2, 4, 6, 8, 10 and 12 during construction of the project.

Lines 2,4 and 6 in the formula shall not be greater than seventy percent (70%) in each category for the sole purpose of determining award of the contract. Similarly, lines 8, 10 and 12 shall not be greater than fifteen percent (15%) in each category for the purpose of award criteria only. The seventy percent (70%) and fifteen percent (15%) goals are not intended to restrict the total number of minority and female employees to be used on the project, but only to establish limiting figures for use in the formula.

2. Award Criteria Figure Formula

Award Criteria	Figure Formula	1000
Line 1.	Total Base Proposal (Refer to Line 9 of FORM) ADJUSTMENT FACTORS), in figures	TBD
Line 2.	Percentage of the Journeyworkers hours that the Contractor proposes to be worked by minority Journey workers during construction of the project. (Maximum figure 0.70)	0.50
		TBD
Line 3.	Multiply Line 2 by Line 1 by 0.04	***
Line 3.	that the Contractor proposes to	
Line 4.	Percentage of total Apprentice hours that the Contractor proposes to be worked by minority Apprentices during construction of the project.	0.10
	(Maximum figure 0.70)	TBD
Line 5.	Multiply Line 4 by Line 1 by 0.03	IBU
Line 6.	Percentage of the total Laborer hours that the Contractor proposes to be worked by minority Laborers during construction of the project.	0.50
	(Maximum figure 0.70)	TBD
Line 7.	Multiply Line 6 by Line 1 by 0.01	(65
Line 8.	Percentage of total Journeyworker hours that the Contractor proposes to be worked by female Journeyworkers during the	.01
	construction of the project. (Maximum figure 0.15)	TBD
Line 9.	Multiply Line 8 by Line 1 by 0.04	IBD
Line 10.	Percentage of total Apprentice hours that the Contractor proposes to be worked by female Apprentices during construction of the project	-



Award Criteria Figure

The EEO goals will be based on specific Projects/Location:

Sample below:

Minority Workers	Percentage	Female Workers	Percentage
Minority Journeyworkers	50%	Female Journeyworkers	2%
Minority Apprentices	50%	Female Apprentices	2%
Minority Laborers	50%	Female Laborers	2%

COST FORMS

DI	SCRIPTION			COST
1.	General Conditions			\$ <u>TBD</u>
2.	Payment and Performance Bond & Insuran	ice		
	Payment and P	erformance Bond	\$TBD	\$ <u>TBD</u>
L		Insurance	\$TBD	
3.	Construction (A+B)			
	A. Pre-Construction Services ¹		\$TBD	
	Cost of the Work ¹ (Cost of Construction + Allowances + CM Contingency + Communication	mission's Contingency)	\$TBD	
	Cost of Construction	\$TBD		ATDD
	Site Work Allowance ²	\$TBD		\$ <u>TBD</u>
ı	Moisture Mitigation Allowance ²	\$TBD		
ı	CCTV Allowance ²	\$TBD	\$TBD	
	Utility Allowance ²	\$TBD		
	CM's Contingency ²	\$TBD		
	Commission's Contingency ²	\$TBD		
4.	Construction Manager's Fee (percentage of the total v	%	\$ <u>TBD</u>	
	e Guaranteed Maximum Project Cost Propoucation Program will be the added values of Lines 1	h School	\$ <u>TBD</u>	

Assist Agencies



Sole Point of Contact



patricia.montenegro@cityofchicago.org



NETWORKING SESSION

