Construction Management at **Risk** Services for Various **Chicago Public** Schools

(Package 1)



November 26, 2018

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

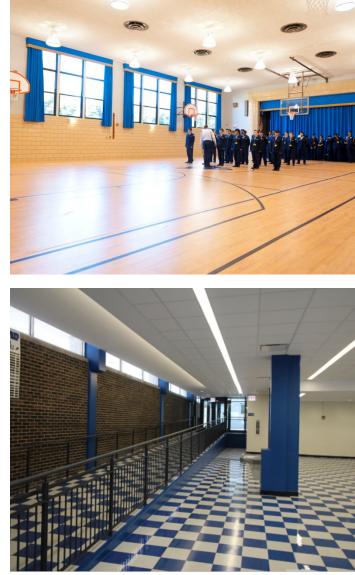
- The CM will administer the pre-qualification procedures and manage the bid and award process.
- The Construction Manager shall collaborate with the AOR to assemble bid packages for trade subcontracts to be bid.
- The Construction Manager shall schedule and administer a public bid opening for each trade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



Considerations

- Project descriptions, scope, and schedule
- Interim 60% SD submittals
- System narratives
- Specification Table of Contents
- Phasing plans
- Traffic studies
- Geotechnical reports
- ESA Phase I reports
- Roofing Reports
- Boundary Surveys
- Cost Form



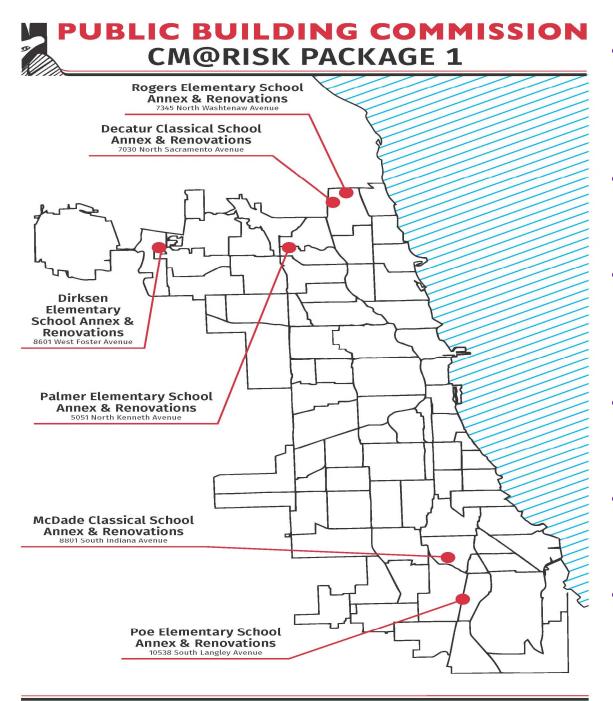


renovation





annex



- <u>Decatur</u> Classical Elementary School Annex and Renovations
- <u>Dirksen</u> Elementary School Annex and Renovations
- McDade Classical
 Elementary School
 Annex and
 Renovations
- Palmer Elementary
 School Annex and
 Renovations
- <u>Poe</u> Elementary School Annex and Renovations
- <u>Rogers</u> Elementary
 School Annex and
 Renovations

Procurement Timeline



Issue RFP......November 5, 2018 Addendum 1 issued.....November 9, 2018 Addendum 2 issued.....November 16, 2018 Addendum 3 issued.....November 23, 2018 Pre-Submission Conference....November 26, 2018 Submission Deadline....November 30, 2018 at 1:00PM Target Award......December 2018 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.

Availability of Documents related to this solicitation:

- PBC link
- Front Desk Reception 50 West Washington, Suite 200, Chicago, IL 60602

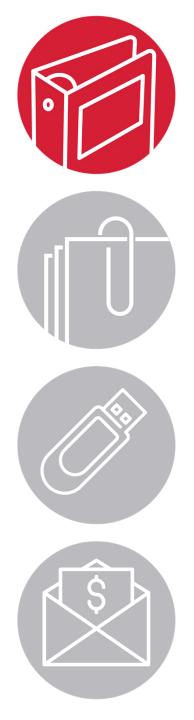
Number of Copies:

- 1 signed, bound original copy; and
- 2 signed, bound copies; and
- Submit 4 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

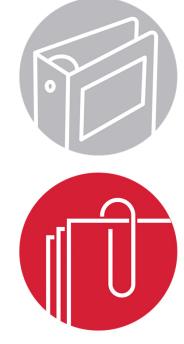


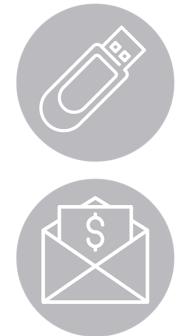


RFP SUBMISSION REQUIREMENTS 2 Double Sided, Unbound Copies

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

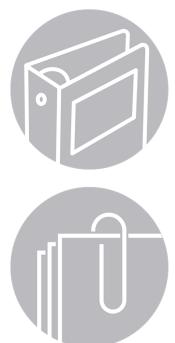






RFP SUBMISSION REQUIREMENTS 4 USB Drives

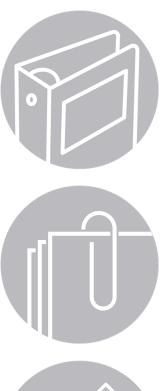
- 4 USB drives, each with a single, searchable PDF of your entire submission
- PDF File Name: SU_YourFirms'Name_CMARServicesat VariousCPSSchoolsP1PS3021_RFPresp onse_YYYYMMDD.pdf
- Sealed in separate envelope





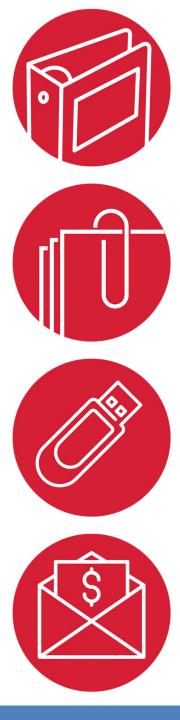
RFP SUBMISSION REQUIREMENTS Financial Statements

- 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, 4 USB drives, 1 finance packet Clearly 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 1) - PS3021

SECTION V – SUBMISSION CHECKLIST

B. SUBMISSION CHECKLIST REFERENCE TABLE

The table below has been created to help facilitate the submission process. Submissions are to be organized and labeled in the following order:

т	Δ	R	1

Cover Letter Table of Contents

TAB 2

Evaluation Criteria: Technical Competence and Past Performance (Form A)

TAB 3

Evaluation Criteria: Project Approach and Methodology

TAB 4

Evaluation Criteria: Qualifications and Experience of Key Staff (Form B)

TAB 5

Other Criteria: Licenses and General Information

Other Criteria: Affidavits (Form C and J)

Other Criteria: Legal Actions (Form D) MBE/WBE, EEO, Community Participation (Form E)

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)

Form K – Joint Venture Affidavit

Joint Venture Agreement

TAB 12

Proposal Acknowledgment and Acceptance (Form H)

Cost Form (per Project)

FINANCIAL STATEMENTS – Submit in a separately Sealed Envelope – Do not include in Electronic Submission

Evaluation Criteria: Financial Capacity

Submission Checklist

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%



FORM A – TECHNICAL COMPETENCE AND PAST PERFORMANCE

P	lease complete a	a form for each	project identif	fied.	A total of three (3) is require	ed.	
		PRO	JECT NO		-		
Project Name:							
Project Type:	New Constru	ction 🗌 Renova	ation 🗌 Other	r			
Agency/Client:							
Agency Type:	Public P	rivate Respon	ident's Role:		Construction Manager at Ris General Contractor Sub Contractor Other:	sk	
Please describe you management? Trad		the project. (ie V	What portion o	of the	work did your firm self-pe	form	n? Was it strictly
					nce after January 1, 2015? Original Contract Value:	\$	Yes No
W	as project comp	leted on budget	(If no, please)	expla	in below or attach explanation.)		Yes N
					Final Contract Value:	\$	
Was	project complete	ed on schedule	? (If no, please)	expla	in below or attach explanation.)		Yes No
		If applic	able, did Proje	actre	ceive LEED Certification?		Yes No
Level of LEED Certi	fication:	ii appilo	auto, and i Toje				
Was the project per	mitted? slow or attach expla		ith please identify	y belo	w the type of permit, the		Yes No
Type of Permit:		New Const	ruction		Easy Cons	truct	ion
City/Town/Village, S	State:						
Permitting Body:							

Technical Competence and Past Performance

*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 Project Manager Project Executive Project Executive Project Manager Superintendent Project Executive				
Name:	Name:				
Title:	Title:				
Number of years with the firm:					
PLEASE ATTACH RESUME					

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, AND COMMUNITY HIRING PARTICIPATION FORM E - MBE/WBE, EEO, AND COMMUNITY HIRING PARTICIPATION PROJECT ONE Client Name: **Client Contact:** SUBMITTING FIRM NAME: Client Contact Telephone: Please identify and report compliance history for least three (3) projects completed over the last three (3) years for which Project Name: 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, Project Total: Year Completed: please complete the "Demonstrate Commitment" section below. Respondent must provide evidence of past experience achieving commitments to utilize minority and women owned The PBC will be hosting outreach sessions, networking events, and community hiring intakes where the Respondent is Respondent must demonstrate commitment by affirming and acknowledging the PBC's MBE/WBE goals. If Responde expected to fully participate. WBE Goal not able to commit to the MBE/WBE goal stated in the RFP, please submit a narrative requesting relief and explaining % Actual MBE % Actual WBE % Respondent believes that the goals cannot be achieved. Respondent must provide evidence of past experience achieving commitments to utilize minority and women jouryneyworkers, apprentices, and laborers. Additionally, Respondent must provide history of meeting city of Chicago Respondent must demonstrate commitment by affirming and acknowledging the PBC's commitment to employ m(CRO) requirements and community hirring (CH) requirements. Please fill in the boxes below. women journeyworkers, apprentices, and laborers along with local/community residents on goals for each Proje-Respondent is not able to commit to EEO, CRO, and CH stated in the RFP, please submit a narrative requesting Minority Workforce Minority explaining why Respondent believes that the goals cannot be achieved. Minority Jouneryworker Minority Jouneryworker Goal Minority Apprentice Actual Minority Laborer DEMONSTRATE COMMITMENT Apprentice % Goal Minority Laborer Actual Goal % % Actual % Female % Female Workforce % Female Jouneryworker Female Jouneryworker Female Goal Apprentice Actual Apprentice Female Laborer % Goal Female Laborer % Actual Goal % Actual City of Chicago and Community Hiring Workforce % % City of Chicago % Goal City of Chicago **Community Hiring** Actual Community Hiring % Goal % Actual % %

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 INFORMATION				
	Does your org	anization have a safety program?	Yes No	
	N	Ionth and year first implemented:		
Method of review of program.				
Please indicate whether regul	ar work site safety meetings a	re held and how frequently.		
	MANUA		DSS CONTROL	
for workplace safety law viola		the period of the last three years	Yes No	
 The nature of the viola 	ation for which your organization	Was cried.		
2. Summary of your pos	ition of the matter			
Official resolution of v	iolation			
White is smaller than 2.0 when		ation's OSHA reportable incident ra mmaries for the last three years and a wri		
		mmanes for the last three years and a wh ase attach Narrative Statement, if necessa		
Please provide a copy of you worksheet.	r organization's NCCI current e	xperience modification rate factors	("EMRF") rating	
	ttach your OSHA Form 300A Summa attach Narrative Statement, if neces	aries for the last three years and a written	explanation to the	
qualincation questionnaire. Please	attach Narrative Statement, il neces	sdry./		
PLEASE PROVIDE NCCI RATING FOR THE PAST FOUR YEARS				
Year	NCCI Rating	Year	NCCI Rating	
	-		-	

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. <u>Current</u> Employees of the Public Building Commission of Chicago are prohibited from being included as valid references.

SUBMITTING FIRM NAME:

DEEEDENCES						
REFERENCES						
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:			
			h.			
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:			
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:			

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

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.

PUBLIC BUILDING COMMISSION OF CHICAGO

Lori Ann Lypson, Secretary

Mayor Rahm Emmanuel, Chairman

CONTRACTING PARTY

Address

Contractor Name

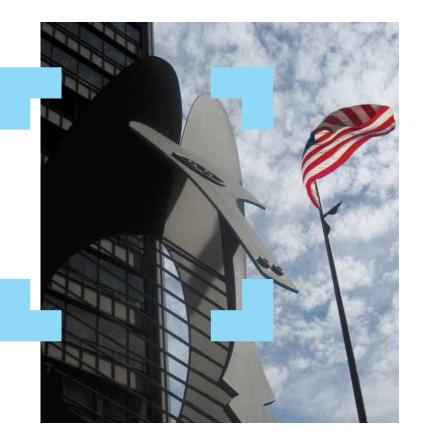
Address

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.





Joint Ventures

- Schedule B
 - Joint Venture Agreement
- Certification Letter if MBE/WBE

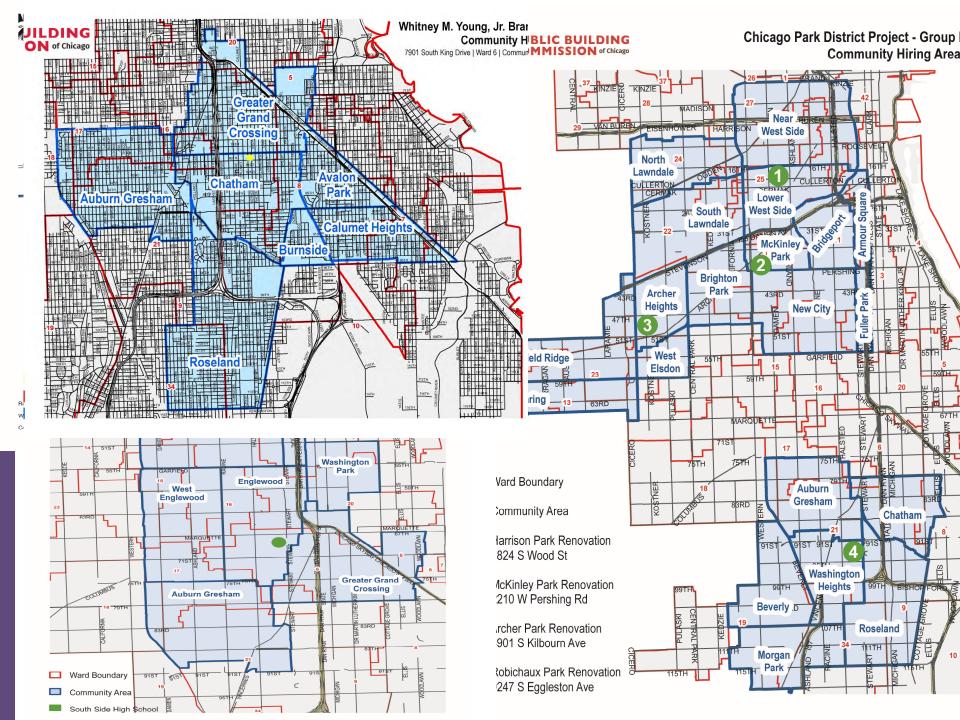
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City Residency & Compliance: Community Hiring

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



ward Criteria

Basis of Award (Award Criteria Figure)

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.

1. Instructions

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.

Award Criteria Figure Formula

Award Criteria	igure roman	
Line 1.	Total Base Proposal (Refer to Line 9 of FORM I - PROPOSED 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
Line 3.	Multiply Line 2 by Line 1 by 0.04	TBD
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	
Line 6.	Percentage of the total Laborer hours that the Contractor proposes to be worked by minority Laborers during construction of the project. (Maximum figure 0.70)	0.50
		TBD
Line 7.	Multiply Line 6 by Line 1 by 0.01	
Line 8.	Percentage of total Journeyworker hours that the Contractor proposes to be worked by female Journeyworkers during the construction of the project. (Maximum figure 0.15)	.01
	construction of the project. (meaning of	TBD
Line 9.	Multiply Line 8 by Line 1 by 0.04	
Line 10.	Percentage of total Apprentice hours that the Contractor proposes to he worked by female Apprentices during construction of the project	and the second s



Award Criteria Figure

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

Sample below:

Minority Workers	Percentage	Female Workers	Percentage
Minority Journeyworkers	40%	Female Journeyworkers	2%
Minority Apprentices	50%	Female Apprentices	1%
Minority Laborers	60%	Female Laborers	2%

COST FORMS

DESCRI	IPTION			COST
1. Gene	eral Conditions			\$ <u>TBD</u>
2. Payn	nent and Performance Bond & Insurar	nce		
	Payment and F	Performance Bond	\$TBD	\$ <u>TBD</u>
		Insurance	\$TBD	
3. Cons	struction (A+B)			
Δ	Pre-Construction Services ¹		\$TBD	
B				
	(Cost of Construction + Allowances + CM Contingency + Com	mission's Contingency)	\$TBD	
	Cost of Construction	\$TBD		4700
	Site Work Allowance ²	\$TBD		\$ <u>TBD</u>
	Moisture Mitigation Allowance ²	\$TBD		
	CCTV Allowance ²	\$TBD	\$TBD	
	Utility Allowance ²	\$TBD		
	CM's Contingency ²	\$TBD		
	Commission's Contingency ²	\$TBD		
4. Cons	struction Manager's Fee (percentage of the total	value of line 3)	%	\$ <u>TBD</u>
The Guaranteed Maximum Project Cost Proposal for Decatur Classical Elementary School Annex & Renovations will be the added values of Lines 1 + 2 + 3 + 4				\$ <u>TBD</u>

Assist Agencies



Sole Point of Contact



patricia.montenegro@cityofchicago.org



NETWORKING SESSION

