



BEEKMANTOWN CENTRAL SCHOOL DISTRICT

37 Eagle Way
West Chazy, NY 12992-2577

TELEPHONE: (518) 563-8250

FAX: (518-563-8132



REQUEST FOR PROPOSALS FOR PROFESSIONAL SERVICES CONSTRUCTION MANAGEMENT SERVICES

The Beekmantown Central School District (The District) invites construction management firms to submit Proposals to perform construction management services for the District's anticipated capital project. The Beekmantown CSD Community approved the Beekmantown Central School District Proposition on May 16, 2023. The total amount of the approved Capital Project is \$11,132,615.

Scope of Work:

The anticipated scope of work for this capital project includes, but is not limited to, the work listed on **Attachment #1** at Beekmantown Central School District, a New York State Pre-K - 12 Public School located in Clinton County New York.

Preliminary Project Schedule:

The preliminary project schedule indicates the following key milestone dates:

1. Public Referendum: **May 16, 2023**
2. Design Phase:
3. SED review and approval/completion of Design:
4. Bid and contract award period:
5. Construction Phase:
6. Contractor close-out:

The District anticipates hiring a construction management firm in April, 2024 and the total project duration for the delivery of construction services is estimated to be 31 months. The District requests that firms responding to this RFP base your fee structure on the above timelines.

Terms and Conditions:

A required walk through will be held at the Central Administration Offices, 197 Haynes Road, Plattsburgh NY at 1:00 p.m., Monday, March 11, 2024 in the District Office.

The District reserves the right to amend this RFP by addendum for any reason or based upon questions and issues raised at the walk through and/or received in writing during the proposal process. Proposers represented at the walk through will receive in writing all addenda issued by the District for this RFP.

This RFP does not commit the District to award a contract, pay any cost incurred in the preparation of a proposal in response to this RFP, or to procure or contract for services. The District intends to award a contract on the basis of the best interest and advantage to the District, and reserves the right to accept or reject any or all proposals received as a result of this RFP, to negotiate with all qualified Proposers, or to cancel this RFP in part or in its entirety, if it is in the best interest of the District to do so. The District may

select as the successful Proposer that proposal which, in the District's sole discretion and with whatever modifications the District and the Proposer may mutually agree upon, best meets the District's requirements whether or not that proposal is the lowest priced. No Proposer shall have any legal, equitable, or contractual rights of any kind arising out of its submission of a proposal except to the extent that the District, in its sole discretion, shall enter into a contract with the successful Proposer that it selects.

Each Proposer by submitting a response to this RFP agrees that its proposal shall be irrevocable for ninety (90) days after the proposal due date.

The successful proposer (Construction Manager) shall not discriminate against any individual, in accordance with applicable Federal, State or local laws.

All contracts, agreements and ancillary documents between the successful Proposer and the District are subject to the review modification and approval of the District's legal counsel and shall incorporate the terms and conditions of this RFP. The contents of the successful Proposer's proposal may become part of the contractual obligations if deemed appropriate by the District."

Proposal Responses and Questions:

Please submit four (2) copies of your proposal, based on the enclosed outline, no later than, March 22, 2024 to the following address:

Jennifer Parliament
Business Manager
Beekmantown Central School District
37 Eagle Way
West Chazy, NY 12992

Use the **SEALED BID LABEL** provided herein. Include in the packet the completed Construction Manager Information Form provided herein, and the completed Affidavit of Non-Collusion provided herein.

Please direct any questions to Jennifer Parliament, BCSD Business Manager, at parliament.jennifer@bcsdk12.org or phone (518) 324-2993.

Proposals may be mailed or hand delivered and **must arrive no later than 4:00pm March 22, 2024.** Proposers submitting proposals by mail will assume the risk of delays in the mail. No proposal will be accepted by electronic mail or facsimile. Late proposals will be returned unopened.

Explanation of Firms Capabilities:

- A. The minimum qualifications that will be considered by the District as a basis for selection of a construction manager are as follows:
- Responding firms must have a minimum of five years experience providing professional construction management services as described in the RFP.
 - Firm's prior experience as a construction manager should include at least five completed projects valued at over \$15 million each of similar size, scope, complexity, schedule constraints, etc. Firms must demonstrate prior experience as a construction manager for NYS School Districts. Prior experience as a construction manager and familiarity with NYS General Municipal bidding laws and other New York State Education Department rules and regulations as they pertain to public school buildings will be a major consideration.

- Only firms that meet or exceed the above minimum selection criteria set forth by the District will be seriously considered. The selected CM firm shall not bid or perform any of the trade construction work.
 - Joint ventures or teaming arrangements among multiple firms are not encouraged in this project.
- B. List your firm's current projects including name, contract amounts and completion dates.
- C. Describe your firm in terms of financial resources, staff capabilities, and construction experience.
- D. Explain your firm's staffing plan, including resumes for each staff member and the role they will play during this project.
- Who will be the staff members on-site (*Designate specific personnel committed to this project*)?
 - Who will be the senior staff member that will be in charge of this project?
 - Name the staff at the home office that will participate and the role that they will play in this project?
- E. Please provide details regarding your understanding of the scope of services required and the approach your firm would use to achieve the school district's objectives. Explain how the firm will keep the project on schedule, and how the firm plans to coordinate and phase the work so as to minimize disruption to the owner's operations. Outline methods and techniques used in the past by the firm to contain and reduce project costs. Also provide software capabilities and project tracking methods.
- F. Submit the following references:
- Contact information for three (3) New York School Districts where your firm has been construction manager of record, and
 - Contact information for three (3) Architectural and/or Engineering Firms that have been employed on projects where your firm has been the project manager of record.
- G. Required Insurance:
- 1) A full completed insurance agreement is included as **Attachment #2** and shall be executed and submitted with the RFP response.
 - 2) Notwithstanding any terms, conditions or provisions, in any other writing between the parties, the consultant hereby agrees to effectuate the naming of the district as an additional insured on the consultant's insurance policies, with the exception of workers' compensation, NY State disability. Insurance based on occurrence.
 - 3) The policy naming the district as an additional insured using Endorsement CG2010 11/85 or CG2033 with CG2037 10/01 or CG2010 10/01 with CG2037 10/01 or equivalent coverage to include products and completed operations to the Additional Insureds. Completed operations insurance need to be maintained three years after the completion of the job. The insurance coverage shall:
 - Be purchased from an A.M. Best's rating of A- or higher.
 - State that the organization's coverage shall be primary and noncontributory with respect to any other collectable insurance for the Beekmantown Central

School District, its Board of Education, employees, volunteers, representatives, agents and partners.

- Additional insured status shall be provided by standard or other endorsements that extend coverage to the District for both ongoing and completed operations. The decision to accept an endorsement rests solely with the District. A completed copy of the endorsements must be attached to the certificate of insurance.
 - 4) The consultant agrees to indemnify the district for any applicable deductibles and self-insured retentions.
 - 5) The district is a member/owner of the NY Schools Insurance Reciprocal (NYSIR). The consultant further acknowledges that the procurement of such insurance as required herein is intended to benefit not only the district but also the NYSIR, as the district's insurer.
- H. The financial costs to the school district should be on a **fixed sum cost proposal** contract basis with costs of all transportation, insurance, vacations, meals, etc. included in the proposal. The school district will provide adequate on-site temporary office space with desk, file cabinets, and telephone (including long distance capability), internet connection, fax, use of school copier and office supplies. The RFP financial costs should not be on a fee plus services or an hourly/daily basis.

Scope of Services:

The scope of services that the construction manager is to provide during pre-construction, construction, and post construction phases of this project shall include, but not be limited to, as follows:

Pre-construction:

- *Work with architect and owner to prepare project general conditions and phasing plans to be included in contract documents.*
- *Provide independent, in-house detailed project cost estimates at the completion of the following phases:*
 - a) *Schematic*
 - b) *Design Development*
 - c) *Construction Documents/Pre-bid*
- *Develop construction phasing schedule to be included in contract documents.*
- *Review construction documents and offer recommendations prior to establishing bid date.*
- *Maintain a milestone construction schedule/timeline.*
- *Sub-divide the scope of work by prime contract category to be included in the contract documents and (Summary of work).*
- *Work with architect and owner to determine the appropriate bid alternates for the project.*
- *Value engineering (budget protection after SED estimates)*
- *Logistics Planning*
- *General requirements*

Bidding Phase:

- *Work with architect and owner to determine the best bidding strategy for the project.*
- *Recommend bidding schedule based on market conditions.*
- *Attend pre-bid walkthroughs.*
- *Attend bid opening(s).*

- *Thoroughly evaluate bids. Meet with bidders to review bids. Make recommendation of Contract Awards to the Owner and Architect for consideration by the Board of Education.*
- *Contract award coordination and distribution of Bid results.*

Construction Phase and Closeout:

- *Establish and maintain a continuous and full time presence with an on-site project office in office space provided by the school district.*
- *Provide start-up assistance, daily coordination of construction schedules and logistics.*
- *Assist the owner in procuring the necessary construction testing services for the project.*
- *Notify Owner/Architect of any deviation from contract documents.*
- *Coordinate all utility interruptions with Beekmantown Central School administration.*
- *On-site, continuous day-to-day inspection and supervision of all work in process including second shift, holiday and weekend work.*
- *Ensure that contractors follow all laws, statutes, codes and regulations during construction and maintain required exit pathways, separation from student areas, complies with smoke free and drug free workplace policies.*
- *Coordinate all site stored material locations and contractor staging.*
- *Coordination of all contractor's' activities.*
- *Act as liaison between contractors, and Beekmantown Central School and their designated representatives.*
- *Monitor the quality of the work and verify compliance with plans and specifications. Identify poor quality and non-conforming work for correction by contractors.*
- *Greet, escort and log all authorized visitors to the site. Prevent unauthorized visitors from entering the site.*
- *Review contractor safety procedures on an ongoing basis.*
- *Solicit, review and approve construction schedules.*
- *Review and validate any T & M work.(T & M – time and material)*
- *Collect, review, approve and distribute all contractor payment applications for progress verification.*
- *Review contractor change requests and proposals and make recommendations to the Board of Education and architect.*
- *Monitor construction schedules and initiate corrective action plans with contractors to remain on schedule.*
- *Prepare and maintain a master project schedule.*
- *Log and monitor all requests for information (RFI's).*
- *Maintain a daily log of activities on the jobsite, and submit on a weekly basis to the Owner.*
- *Log and maintain all project samples on site and MSDS data sheets.*
- *Coordinate and monitor all required site and material testing during construction.*
- *Notify architect in advance of required construction and testing observations to be witnessed by architect or engineers.*
- *Coordinate and chair required contractor site meetings and distribute meeting notes.*
- *Coordinate and chair bi-weekly progress meetings and distribute meeting notes.*
- *Prepare and present progress reports to the Beekmantown Central School Board of Education in a format agreed to by both parties. This may require attendance at Board meetings and various committee meetings.*

- *Maintain documentation and photographs of project progress.*
- *Monitor the progress of all project record drawings and initiate corrective actions with contractors to keep record drawings current.*
- *Maintain a file of all project documentation to be given to owner at project completion.*
- *Coordinate building occupancies and construction phasing to comply with the needs of the Board of Education.*
- *Coordinate punch list inspections and resolution of punch list items.*
- *Collect, review, approve, and distribute all closeout documentation for the project.*
- Construction manager is responsible for assisting District in exercising guarantees and warranties and performing warranting inspections post closeout and reporting incomplete or unsatisfactory work.

Reference to and coordination with Architectural & Engineering Scope of Services:

The Architect has been retained to provide the following list of services including but not limited to:

- Professional architectural and engineering services necessary for the Construction Document preparation, SED plans and specifications submittals/revisions/responses/approvals, bidding and construction administration services through the close-out phase.
- Collect all bonds and insurance certificates from contractors and forward copies to the Owner.
- Review and approve shop drawings and submittals.
- Maintain a log of all proposal requests and contractor proposals.
- Prepare all contracts and change orders for submittal to NYSED.
- Conduct periodic site visits.
- Assist the owner in monitoring the project budget and expenses.
- Review and approve all project closeout documentation.
- Review and approve applications for payment from contractors.
- Prepare all Certificates of Substantial Completion and Occupancy Certifications.

Included as **Attachment #3** is an illustrative Matrix listing the coordination of activities between the Owner, Architect & Engineering Firm and the Construction Manager.

The Board of Education of the Beekmantown Central School District appreciates your time and effort in preparing this RFP for our review and consideration. We anticipate hiring a Construction Management firm in April 2024 based on our above criteria.

SEALED BID LABEL – CUT OUT

Cut this label along the outer border and affix it to your sealed RFP response to identify it as a **“SEALED PROPOSAL.”**

Affix a return address label for your company to your package.

Deliver the package to the address on the label before the due date shown on the label. USPS mail delivery times/schedules are not guaranteed.

*****SEALED PROPOSAL – DO NOT OPEN*****

RFP for CONSTRUCTION MANAGEMENT SERVICES

Due 4:00 p.m., March 22, 2024 to the following address:

Deliver to:

Beekmantown Central School District

Attention: Jennifer Parliament

**% District Office
197 Haynes Road
Plattsburgh, NY 12992**

CONSTRUCTION MANAGER INFORMATION FORM

Name of firm, address, phone and fax number of your firm's main office

Firm _____
Address _____
City, State, Zip _____
Telephone _____ Fax _____

Name, title, address, telephone and fax number of the firm's officer responsible to the District for all the work to be provided under this RFP:

Name/Title _____
Address _____
City, State, Zip _____
Telephone _____ Fax _____

Please check the appropriate box to identify the legal entity making this proposal.

Corporation Partnership Individual Joint Venture

If a Joint Venture, identify other firm(s) in association.

Firm/Contact _____
Address _____
City, State, Zip _____
Telephone _____ Fax _____

If yes to any of the following questions, please attach a separate sheet of explanations; state the project(s), date, owner and reason.

Has your firm or joint venture failed to accept a contract or to complete a contract awarded to you?

Yes No

Has your firm or joint venture under another or previous name failed to accept a contract or to complete a contract awarded to you? Yes No

Has your firm or joint venture had a contract terminated or been given written notice or demand incident to a proposed contract termination? Yes No

State the name, agent's name, address, telephone number of your current bonding company(s) and identify any other sureties used by your firm during the past five (5) years.

Company Name _____

Agent Name _____

Address _____

City, State, Zip _____

Telephone _____ Fax _____

PROPOSAL CERTIFICATIONS

Firm Name: _____

Business Address: _____

Telephone Number: _____ Date of Bid/Proposal: _____

I. General Bid Certification

The bidder certifies that s/he will furnish, at the prices herein quoted, the materials, equipment and/or services as proposed on this bid.

II. Non-Collusive Bidding Certification

By submission of this bid proposal, the bidder certifies that s/he is complying with Section 103-d of the General Municipal Law as follows:

Every bid or proposal hereafter made to a political subdivision of the state or any public department, agency or official thereof where competitive bidding is required by statute, rule regulation or local law, for work or services performed or to be performed or goods sold or to be sold, shall contain the following statement subscribed by the bidder and affirmed by such bidder as true under the penalties of perjury;

(a) By submission of this bid, each bidder and each person signing on behalf of any bidder certifies, and in the case of a joint bid each party thereto certifies as to its own organization, under penalty of perjury, that to the best of his/her knowledge and belief:

- (1) The prices in this bid have been arrived at independently without collusion, consultation, communication or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other bidder or with any competitor;
- (2) Unless otherwise required by law, the prices which have been quoted in this bid have not been knowingly disclosed by the bidder and will not knowingly be disclosed by the bidder prior to opening, directly or indirectly, to any other bidder or to any competitor; and
- (3) No attempt has been made or will be made by the bidder to induce any other person, partnership or corporation to submit or not to submit a bid for the purpose of restricting competition.

(b) A bid shall not be considered for award nor shall any award be made where (a) (1), (2) and (3) above have not been complied with; provided, however, that if in any case the bidder cannot make the foregoing certification, the bidder shall so state and shall furnish with the bid a signed statement which sets forth in detail the reasons therefore. Where (a) (1), (2) and (3) above have not been complied with, the bid shall not be considered for award nor shall any award be made unless the head of the purchasing unit of the political subdivision, public department, agency or official thereof to which the bid is made, or his designee, determines that such disclosure was not made for the purpose of restricting competition.

Any bid hereafter made to any political subdivision of the state or any public department, agency or official thereof by a corporate bidder for work or services performed or to be performed or goods sold or to be sold, where competitive bidding is required by statute, rule, regulation, or local law, and where such bid contains the certification referred to in subdivision one of the section, shall be deemed to have been authorized by the board of directors of the bidder, and such authorization shall be deemed to include the signing and submission of the bid and the inclusion therein of the certificate as to non-collusion as the act and deed of the corporation or partnership.

Signature (Authorized) _____

Title _____

ATTACHMENT #1

Proposed Capital Project Work Description

The Project to include a capital improvement project consisting of building demolition, renovations, improvements and addition (7,000 sf classroom addition) to the Beekmantown Main Building (Elementary/Middle/High School), new construction (2500 sf cold storage building), replacement of existing sand filter, addition of parking, relocation of an elementary outdoor basketball court, replacement of elementary playground, and renovations and improvements to the Cumberland Head Elementary School, including for each: site improvements, original furnishings, fixtures and equipment.

ATTACHMENT #2

Insurance Coverage Agreement

BEEKMANTOWN CENTRAL SCHOOL DISTRICT

This agreement is being entered into by all indicated parties for any and all work done for, with, or on behalf of BEEKMANTOWN CENTRAL SCHOOL DISTRICT (Building Owner) for the period starting with: April 1, 2024 (RFP reply Date) and running until: October 2026 or project completion date.

This agreement is being provided for BEEKMANTOWN CENTRAL SCHOOL DISTRICT (Building Owner) by _____ (Name of Construction Manager) in full agreement to the insuring and hold harmless conditions outlined below, and pertains to all work performed during this indicated period of time whether via written or verbal arrangements.

Prior to commencement of any work under this Contract and until completion and final acceptance of the work, the Professional Service providers, Contractors and Subcontractors shall, at their sole expense, maintain the following insurance on its own behalf, and furnish to the Building Owner, certificates of insurance evidencing same and reflecting the effective date of such coverage as follows:

The Construction Manager shall purchase from and maintain in a company or companies lawfully authorized to do business in the jurisdiction in which the Project is located such insurance as will protect the Construction Manager from claims set forth below which may arise out of or result from the Construction Manager's operations and completed operations under the Contract and for which the Construction Manager may be legally liable, whether such performance be by the Construction Manager or by a Contractor/Subcontractor or by anyone directly or indirectly employed by any of them, or by anyone for whose acts any of them may be liable.

- A. **Workers' Compensation** and Occupational Disease Insurance in accordance with the applicable law or laws; Employer's Liability Insurance. This includes sole proprietorships and officers of corporations who will be performing work on the job.
- B. **Commercial General Liability** with a combined Bodily Injury and Property Damage limit of not less than ONE Million (\$1,000,000) dollars per occurrence and TWO million (\$2,000,000) in the aggregate. The aggregate must be applicable on a per project basis. Coverage must include the following perils:
 - a. Completed Operations/Products Liability.
 - b. Broad Form Property Damage.
 - c. Personal and Advertising Injury Liability.
 - d. Independent Contractors.
 - e. Building Owner, Board of Education, their officers, directors, partners, representatives, agents and employees, shall be included as Additional Insured using Endorsement CG2010 11/85 or CG2033 with CG2037 10/01 or CG2010 10/01 with CG2037 10/01 or equivalent coverage to include products and completed operations to the Additional Insureds. Completed operations insurance needs to be maintained three years after the completion of the job.
 - f. Coverage is to be endorsed to reflect that insurance is to be primary and non-contributory, with respect to any other collectable insurance, for the Building Owner, Board of Education, and all other parties required to be named as additional insured.
 - g. Coverage is to be provided on an "occurrence" basis with carriers licensed and admitted to do business in the State of New York or otherwise acceptable to the building owner with an A.M. Best's rating of A- or higher.
 - h. A copy of policy and/or endorsement(s) and any other documents required to verify such insurance are to be submitted with the appropriate certificate(s). Failure to provide these documents is not to be construed as a waiver of the requirements to provide such insurance.
 - i. There should be no exclusion under the policy that would exclude or limit coverage for claims under New York Labor Law 240 or 241.

- C. Commercial Automobile Liability Insurance covering the use of all Owned, Non-Owned, and Hired Vehicles with combined Bodily Injury and Property Damage Limit of at least One Million (\$1,000,000.00) Dollars.
 - a. Coverage is to be endorsed for Building Owner, and all other parties required to be named as additional insured.
- D. Where an Off Project Site Property exposure exists with materials and supplies that will become part of the site property, evidence of insurance coverage is required (builder's risk or installation floater). The Construction Manager at its sole expense shall furnish to The Building Owner Certificates of Insurance and other required documentation evidencing the following coverage. "All Risk" Property Insurance on all materials, equipment and supplies intended to become a permanent part of the construction stored on premises away from the project site and while in transit, until actually delivered to the project site. Coverage is to be provided on a replacement cost basis.
- E. The amount of insurance contained in the aforementioned insurance coverages shall not be construed to be a limitation of the liability on the part of the Contractor or any of its Sub-Contractors.
- F. The Construction Manager shall file certificates of insurance prior to the commencement of work with the building owner with approval of adequacy of protection and the satisfactory character of the Insurer.
- G. Any type of insurance or any increase of limits of liability not described above which the Construction Manager requires for its own protection or on account of statute shall be its own responsibility and at its own expense.
- H. The carrying of the insurance described shall in no way be interpreted as relieving the Construction Manager of any responsibility of liability under this Contract.
- I. Any policies effected by the Construction Manager on its Owned and/or Rented Equipment and Materials shall contain a provision requiring the insurance carriers to waive their rights of subrogation against The Building Owner and all other indemnities named in the Contract.
- J. Should the Construction Manager engage a Contractor/Subcontractor, the same conditions will apply under this contract to each Subcontractor, however, the retained Subcontractor shall be required to maintain limits of liability of not less than One Million (\$1,000,000.00) Dollars per occurrence and in the aggregate, with said limits applicable on a per project basis, or such greater limits as may be required by the retaining Subcontractor.
- K. Umbrella Liability limits of \$1 Million CSL per Occurrence, \$1 Million Aggregate.
 - a. Coverage is to be endorsed for Building Owner, and all other parties required to be named as additional insured.
- L. Owners Protective Liability Coverage:
 - a. The policy shall be written in the name of the project owner.
 - b. The limits of liability shall be equal to or greater than \$1 Million Occurrence, Combined Limit and \$2 Million General Aggregate
 - c. Such policy shall be purchased by the Contractor.

HOLD HARMLESS:

To the fullest extent permitted by law, Construction Manager will indemnify and hold harmless the Building Owner, the Board of Education, their officers, directors, partners, representatives, agents and employees from and against any and all claims, suits, liens, judgments, damages, losses and expenses, including legal fees and all court costs and liability (including statutory liability) arising in whole or in part and in any manner from injury and/or death of person or damage to or loss of any property resulting from the acts, omissions, breach or default of Construction Manager, its officers, directors, agents, employees and subcontractors, in connection with the performance of any work by or for Construction Manager pursuant to any contract Purchase Order and/or related Proceed Order, except these claims, suits, liens, judgments, damages, losses and expenses caused by the negligence of *contractor*. Construction Manager will defend and bear all costs of defending any actions or proceedings brought against the Building Owner, their officers, directors, agents and employees, arising in whole or in part out of any such acts, omission, breach or defaults. The foregoing indemnity shall include injury or death of any employee of

the Construction Manager or any of its Subcontractors and shall not be limited in any way by an amount or type of damage, compensation, or benefits payable under any applicable workers' compensation, disability benefits or other similar employees benefit act.

The Contract hereby expressly permits the Building Owner to pursue and assert claims against the Construction Manager for indemnity, contribution and common law negligence arising out of claims for damages for death and personal injury.

WAIVER OF SUBROGATION:

The Construction Manager waives all rights against Building Owner, Board of Education, their officers, directors, partners, representatives, agents and employees for damages caused by fire or other causes of loss to the insurance applicable to the work, except such rights as they may have to proceeds of such insurance held by the Owner as fiduciary. The Construction Manager shall require of the Subcontractors sub-subcontractors, agents and employees, by appropriate agreements, written where legally required for validity, similar waivers in favor of the parties enumerated herein. The policies shall provide such waivers of subrogation by endorsement or otherwise. A waiver of subrogation shall be effective as to a person or entity would otherwise have a duty of indemnification, contractual or otherwise, did not pay the insurance premium directly or indirectly, and whether or not the person or entity had an insurable interest in the property damaged.

CONSTRUCTION MANAGER (Signature)

OWNER (Signature)

(Print Name and Title)

(Print Name and Title)

(Date)

(Date)

ATTACHMENT #3

Coordination of Services Matrix

		Owner	Legal	Architect Engineer	Construction Manager
PRE-REFERENDUM PHASE					
	Master Activity Schedule	X		X	
	Preliminary Study & Program Definition	X		X	
	Preliminary Study Estimates	X		X	
	Verify Preliminary Study Estimates	X		X	
	Long Range Plan / 5 yr Building Condition Survey	X		X	
	State Aid Calculations	X		X	
	Tax Impact Calculations	X			
	Preliminary Construction Schedule/Phasing	X		X	
	Preliminary SED Cost Allowances	X			
	Bond Resolution - BOE Vote	X	X		
	Public Hearings	X			
	Public Vote	X			
			May 16, 2023		
PRE-CONSTRUCTION PHASE					
	Update Pre-Construction Schedule			X	X
	Land and Topo Survey (Owner Contract)	X		X	
	Soil Borings (Owner Contract)	X		X	X
	Asbestos Survey (Owner Contract)	X		X	X
	Design Development Documents			X	
	Design Development Estimate			X	X
	Value Engineering (Budget Protection After SED Estimate)			X	X
	Phasing Planning			X	X
	Milestone Construction Schedule			X	X
	Bid Strategy			X	X
	Scoping (Summary of Work)			X	X
	Construction Documents			X	
	Cost Review - Post SED Submission & Reconciliation			X	X
	Logistics Planning				X
	General Requirements			X	X
	Project Manual "Front End"			X	X
	SED Submission for Building Permit			X	
	Respond to SED Comments			X	

ATTACHMENT #3

BEEKMANTOWN CENTRAL SCHOOL DISTRICT COORDINATION MATRIX OWNER/ARCHITECT/CONSTRUCTION MANAGER

	Owner	Legal	Architect Engineer	Construction Manager
BID AND PROCUREMENT PHASE				
Advertisement for Bids	X			
Bid Document Distribution			X	X
Bid Solicitation			X	X
Bid Questions			X	
Addenda			X	
Technical Interpretations		X	X	
Scope Interpretations			X	
Bid Opening	X		X	X
Bid Evaluation			X	X
Recommend Contract Awards			X	X
Contract Award	X			
Prepare Contracts		X	X	
CONSTRUCTION PHASE				
Review and Approve Bonds and Insurance			X	
Review subs and suppliers				X
Coordinated Construction Schedule				X
Daily Coordination				X
Daily Inspection				X
Periodic Inspection			X	
Materials Testing - Coordinate (Contract by Owner)	X		X	
Materials Testing - Receive and Review			X	X
Conduct Job Meetings - Prepare Minutes				X
Progress Payments - Review and Approve			X	X
Progress Payments - Pay	X			
Shop Drawing Review and Approval			X	X
Change Management / RFP			X	X
Change Orders - Approve	X			
Change Orders - Prepare and Execute			X	X
Change Orders - Send to SED			X	
Monthly Financial Overview			X	X
Monthly Report (critical issues, budget, schedule)			X	X
Commission Building Systems			X	X
POST-CONSTRUCTION PHASE				
SED Substantial Completion Certificate			X	X
AIA Substantial Completion Certificate			X	X
General Punch Lists			X	X
Implement Punch List Completion				X
Expedite Closeout Work				X
Contractual Closeout	X		X	X
SED Summary Inspection Forms			X	X
Guarantee Inspections			X	X
Guarantee Follow up			X	X