State College Area School District V-D
Office of Physical Plant
Ed Poprik, Director

To: Board of School Directors

From: Ed Poprik

RE: **Construction Management Appointment**

Date: June 23, 2014

Recommend that the Board of School Directors appoint Massaro CM Services, LLC as the Construction Manager for the High School project. Further recommend that the Board authorize the Administration to draft a contract proposal for Board consideration at a future meeting.

Background:

This action will allow administration to begin negotiations for a final scope of work and contract with the selected CM firm, which will be subject to final Board approval.

Based on previous Board discussion and direction, the CAC for Facilities has completed a public presentation and interview process with the following 4, short-listed, firms:

Alexander Building Construction
Gilbane Building Company
Massaro CM services, LLC
Quandel Construction Group

The CAC for Facilities (CAC) identified the above firms to be short- listed as finalists based on their response to the Board approved Request for Proposal (attached). The responses have been posted on the district website at: http://www.scasd.org/domain/54. Each individual CAC member used a matrix to rank the firms independently (attached). The Committee met on June 12 and unanimously agreed to interview the 4 above firms.

Interviews:

Each group participated in a 50-minute interview. These public interviews were conducted on June 17 and June 18. They were taped for internal use and later public broadcast. They are also available on-line at: http://cnet1.org. Present for these interviews were the following representatives:

Alan Popovich	Jeff Kokoskie
Marc McMaster	Paul Heasley
Marianne Kuhns	W. B. Ingram
Art Anderson	Ed Poprik

Each firm received instructions in advance of the interview. (attached)

Deliberations:

Following the interviews, the committee met to deliberate and discuss the entire evaluation process. The committee then evaluated all of the firms based on the following criteria:

-Response to RFP
-Public Interview
-Supplemental materials provided
-Reference checks

At the conclusion of the deliberation the committee reached consensus to recommend Massaro Construction Management Services. They offered the following as the perceived strengths for Massaro:

-Culture of collaborative process
-Knowledge of local bid market and contractors
-Cohesive and experienced team with successful local track record
-Excellent references from previous projects
-Good initial understanding of our site and challenges
-Comparable experience on recent projects
-Strong pre-construction capabilities
-Focused opportunities for SCASD students during project

Request for Proposals - Construction Management Services

State College Area School District
May 30, 2014

Provide the information to the school district by responding to the following points, in the order stated below. Provide three (3) hard copies of the submitted materials, along with an electronic copy (in .pdf format, max size 7 MB). The deadline for submission is June 4, 2014.

Introductory Scope:

In July of 2012, the State College Area School District employed the firm of Crabtree Rohrbaugh and Associates to develop scenarios for a potential High School Project. A final scenario was developed to a "pre-schematic" design phase. (See web site). On May 20, 2014, the voters approved a referendum to fund this project.

Continued development of this project will commence immediately with a goal of releasing bid documents in the Spring of 2015.

The total project cost for the High School will be $115,000,000.00; with construction costs anticipated to be around $90,000.00.

Duration of the scope of work is projected to be from June 2014 through September 2018. (See attached phasing plan, which is a preliminary suggestion, to be confirmed and developed further as part of the CM's scope of work)

This project will be bid according to Pennsylvania Department of Education regulations, with the Construction Manager (CM) acting in an agency capacity. The District will work with the selected CM to determine the final number of Prime Contactors; however, it is anticipated that the work will be broken into 10-20 primes.

More information on this project can be found at:
http://www.scasd.org//site/Default.aspx?PageID=20967

State College Area School District, 5/30/14

Request for Proposal:

1) A single page cover letter describing your firm's interest and unique qualifications for this project.

2) Please identify the project team(s) and structure(s). (The on-site staff members responsible for the construction phase will be expected to be present at the final interview and will be identified specifically in the final contract documents.)

3) For a project of this size, location, and duration please discuss your initial thoughts around the separation of work and multiple prime contracts. Further detail the strategies that you will use to help develop the final related contract documents.

4) As these will be LEED projects, please detail your previous successes and involvement in the certification and commissioning processes.

5) Describe your firm's abilities in regard to utilizing BIM for this project.

6) Provide a recent example of a site logistics plan for a similar project.

7) Please describe your approach to Value Engineering and provide a specific project as an example, including reports provided and a summary of the findings that were implemented as well as those rejected.

8) Please describe your strategies for managing change orders and provide a specific project as an example, including reports provided to the owner and a summary of the budget impact.

9) In order to evaluate the experience of the firm; please identify at least 3 but not more than 5 similar projects that the staff assigned to this project have performed within the last 5 years. Provide a brief self-appraisal of your performance with regard to the project meeting: budget, completion time, and customer requirements. Please also include contact information for each project.
(*If applicable, this can be combined with items 6, 7, and 8).*

State College Area School District, 5/30/14

10) Fee:

All fees will be stated as "fixed fees" rather than percentages. The district plans on utilizing AIA document C132-2009 SP as a basis for the final, negotiated contract. Specific clarifications, additions, amendments, and modifications that will be applied to this document are described below. It is incumbent for all firms to understand all aspects of this fee and scope; therefore, all questions must be formally submitted by May 30 and answers will be distributed to all parties.

3.2.2 through 3.2.9: The district also has its own Design Review Standards (30/60/90%) process (attached), which will be incorporated into the final contract. While these Design Review Standards are intended for the architect's design development submissions, the CM will provide a cost estimate update, constructability review, and value engineering report in response to each phase. Included with the fixed fee should be all costs associated with the project cost estimate, value engineering, and a constructability report at each of the three above-mentioned reviews.

11.6.1.2 and 11.6.1.10: No support for the CM in terms of job trailer nor office supplies, services, and equipment will be provided for in the general bid contracts, so these costs must be reflected in the fixed fee as well. (Assume the trailer to be sized for the CM staff and COTW only, project meetings will be conducted at space provided by the district.)

Staffing-

1.1.12 and 3.3.2: A project manager, who will be available throughout the project, will be appointed.

During pre-construction, staffing needs will vary dependent on the stage of development; the CM will provide adequate staffing to meet the requirements of the project and the schedule.

During the construction phase, the project manager will have 100% of their workload dedicated to the project. If a change in the project manager is required, the owner will be granted the right to approve the replacement. In addition to the project manager, the CM will provide a project superintendent and a project engineer. At minimum, the CM will provide at least 2 staff members on-site at all times when construction is

in progress. Additionally, adequate administrative support will be provided either on-site or another location. Finally, specialty support for technical issues will be supplied as necessary, and back-up or supplemental staff will be added for times when the primary staff is not available or requires additional support. These requirements are minimums and the CM will provide any additional staffing to meet the requirements of the scope of services.

5.5: The District will provide 1 full-time Clerk of the Works (COTW) in support of the construction management efforts. The CM firm will work in concert with the district's COTW to manage day-to-day activities. Due to the importance of a coordinated effort, the CM will provide a desk for the COTW in the CM supplied office space.

Pre-construction - the CM will be a full participant in the integrated design process and be expected to attend all meetings to achieve this requirement. Development of a phasing plan will be part of this responsibility.

3.2.11: The CM will use the technical specifications supplied by the architect to develop the "front-end" documents and the separation of work for the prime contractors as part of a complete set of bidding documents. In conjunction with project estimates, the CM will also provide a suggested list of bid alternates to use in post-bid budget reconciliation.

3.2.14: The CM will aid the district in development and evaluation of a Commissioning (CX) RFP. The CM will then aid in coordination of the CX services throughout the duration of the project.

Construction phase –

Added service to be included in the base bid: The CM will establish an electronic submittal process and manage it throughout the course of the project. The vehicle for this process must be a jointly accessed on-line system available to the district, the architect, and all prime contractors at no cost to the users. Schedules, meeting minutes, technical submittals, change order requests, and progress payments will be included at a minimum. At the end of the project, all files from this system will be delivered to the owner in electronic format. All costs associated with this endeavor are to be funded by the CM.

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Added service to be included in the base bid: The CM will collect and manage the background checks as required by PA statutes. Additionally, they will actively monitor the status of all workers on the site.

3.3.5: Utilizing schedules provided by the multiple prime contractors, the CM will develop, and regularly update, a coordinated construction schedule.

3.3.6: At a minimum, the CM and COTW will jointly lead bi-weekly project meetings, and on opposite weeks, bi-weekly phasing meetings throughout the scope of the project. Meeting minutes will be the responsibility of the CM.

3.3.17: The CM will assist the COTW in developing and maintaining a change order log based on a pre-determined contingency. All change orders will be classified as either "Document, Regulatory, Owner requested, or Unforeseen conditions." The CM will review and advise the owner regarding each change request.

Post Construction –

3.3.24: Adequate participation in project closeout, punch list development, and commissioning will be expected. For the purposes of this fee, do not include the costs of the commissioning agent.

8.2.4: All disputes will be settled through litigation as opposed to arbitration.

Other meetings (beyond standard project related services)-

Added service to be included in the base bid: Attendance at meetings of the CAC for Facilities, approving authorities, and the Board of School Directors will be periodically required. These are generally evening meetings lasting several hours. For the purposes of this proposal, include 48 meetings in the base fee and include a per-meeting cost for adds or subtracts to the meeting total in item 10B.

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10A) Please indicate your fixed fee for this project. The fee will be all-inclusive for services from schematic development through project closeout, including but not limited to all staff related travel and housing.

10B) Please list a per-meeting fee for "other" meetings. (All direct, project related meetings are included in the base fee, regardless of number required).

10C) List any additional services or costs that could be incurred, including reimbursable expenses and include a fee schedule. (AIA C132-2009 SP 11.4: All indirect costs will be billed 1X, that is, no mark-up).

10D) Please indicate a plus/minus adjustment for each month deviation from the project September 2018 completion date.

Attachments:

Draft Phasing Plan
SCASD Design Review Standards (30/60/90%)

	point total	Alexander	Massaro	Quandel	Reynolds	Turner	Gilbane
1) 1 Page cover letter	*(0-1)*						
2) Project Team	*(0-5)*						
3) Separation of Work (multiple primes)	*(0-2)*						
4) LEED	*(0-2)*						
5) BIM	*(0-2)*						
6) Site Logistics	*(0-4)*						
7) Value Engineering	*(0-2)*						
8) Change Orders	*(0-3)*						
9) Project References	*(0-5)*						
10) Fee	*(0-4)*						
Total	***30***	**0**	**0**	**0**	**0**	**0**	**0**

June 13, 2014

Dear Short-List group:

Our team met last night to short-list the responses to the RFP for Construction Management services at our High School project, and has prepared the following direction for our interview process:

A blind draw was conducted to determine the following interview times.

Day/Time	**Firm**
Tues., June 17: 4:00 – 4:50 PM	Massaro
Tues., June 17: 5:00 – 5:50 PM	Quandel
Wed., June 18: 4:00 – 4:50 PM	Gilbane
Wed., June 18: 5:00 – 5:50 PM	Alexander

Interviews will be conducted in the Board Room at 131 West Nittany Ave. A ceiling mounted projector is available in the room. The interviews will be open to the public and taped for future broadcast. Due to the taping of the interviews, you will be limited to presentation through the single projector and any other visuals positioned at the front of the room. We ask that individuals connected with your firm NOT attend a competitor's interview.

Our team would appreciate if those members of your team, who will be most closely tied to the project, would lead the presentation. We will specifically have questions for the proposed field personnel, so they will be required to attend the interview.

Please begin with a maximum 30-minute presentation. It is critical that you time your presentation accurately in order to leave at least 20 minutes for questions and answers. A presentation that lasts longer than 30 minutes will reflect negatively on your interview.

Please do not waste time reiterating large portions of your proposal during the presentation; we have all read the proposals thoroughly. As part of your presentation, the committee has requested that you discuss the preliminary phasing calendar, which was generated at the pre-schematic design phase and subject to revisions. Please discuss your preliminary thoughts of the

feasibility, further development, and any recommended changes. Also, the committee would like you to briefly review your BIM capabilities and confirm whether BIM is included in your base fee. If it is not included in your base fee, please detail the added costs.

Prior to the interview, please contact Ed Poprik via email to answer the following:

-Is your firm currently in litigation regarding any of your construction management projects?

-If so, please provide a brief explanation.

-Has your firm been subject to litigation regarding any of your construction management projects within the last 10 years?

-If so, please provide a brief explanation.

Questions:

There will be scripted questions for each team, and since we have allotted only 20 minutes for questions, your team should be succinct in your answers. The interview team may direct specific individuals to respond to specific questions. Please expect that the field personnel will be called upon for most of the questions, so as stated previously, those individuals will be required to attend the interview.