

REQUEST FOR PROPOSALS

PROPOSAL INSTRUCTIONS AND CONDITIONS
FOR
CONSTRUCTION MANAGEMENT SERVICES
FOR THE
EAST ISLIP UNION FREE SCHOOL DISTRICT

The Board of Education, East Islip Union Free School District is issuing this Request for Proposals (RFP) for the selection of a construction management firm to provide construction management services in connection with various capital improvements to be undertaken by the School District during the 2025-2026 school year and such other projects as the School District may request. The School District has established a capital reserve for capital improvements at the District's facilities. The School District anticipates that an annual amount of up to \$3,000,000 will be deposited into the capital reserve for use in connection with capital projects subject to voter approval.

The School District is seeking one or more qualified individuals/firms to provide construction management services in connection with the various capital improvement projects that the School District may undertake during the 2025-2026 school year and any future school years in which the resultant contract is renewed. The Board of Education reserves the right to award one or more contracts as a result of this RFP. Similarly, the Board of Education reserves the right to renew any contract awarded pursuant to this RFP for additional one-year terms not to exceed three (3) additional one-year terms.

Specifically, the individual (firm) selected as a result of this Request for Proposals will be expected to perform his/her/its services in accordance with any or all of the terms of the agreement annexed hereto as Exhibit "A". As part of the RFP, Proposers should identify in detail the manner in which the services to be required will be accomplished by him/her/it.

Any capital improvement project is subject to the availability of District funds and the approval of the voters of the District.

I. DESCRIPTION OF THE SCHOOL DISTRICT

The East Islip Union Free School District is located in Suffolk County and is comprised of six (6) schools: the East Islip High School; East Islip Middle School; Timber Point Elementary School; Ruth C. Kinney Elementary School; John F. Kennedy Elementary School; Connetquot Elementary School; and the East Islip Union Free School District Administration Center.

At present, the District anticipates submitting approximately \$3 million in proposed capital improvements to its voters as part of the 2025-2026 school year budget.

II. SCOPE OF SERVICES

The Proposer shall provide the services set forth in the annexed agreement to assist the School District in establishing the School District's capital improvement program, the financial and time

requirements and limitations. The successful proposer's services will include but not be limited to:

1. **Pre-Bidding Services:**

- Consult with the School District and the architect/engineer regarding the project program, budget, timetable and advisability of various bidding options and timing of construction.
- Preparation of an independent estimate of the Project costs inclusive of the contingencies based on the construction documents prepared by the School District's architect/engineer.
- Preparation of a schedule that incorporates tasks of the entire team, during the Project's Design Phase and Construction Phase.
- Presentations of the construction projects to be undertaken at public meetings to be held in the community on an as-needed basis.

2. **General Responsibilities:**

- Provide sufficient organization and experienced personnel and management to carry out the requirements of this engagement. The Construction Manager will provide and maintain a qualified, on-site field staff, with sufficient authority to act on the Construction Manager's behalf, to manage the project, conform to the scope of services, and insure that the work is performed in compliance with the contract documents.
- Provide administration management and related services necessary to coordinate the activities of the Construction Manager, architect and contractors, as well as coordination of the construction activities of the contractors with one another. The School District shall have the right to interview and approve all of the Construction Manager's personnel who will be working on-site. The School District reserves the right to request the removal of any of the Construction Manager's personnel.
- All employees assigned pursuant to the terms of this RFP are required to present a picture identification before entering a school building, subject to background check and should wear a visible form of identification while conducting business at all times on school property.

3. **Scheduling:**

- In coordination/cooperation with the School District's architect/engineer, develop a Project Master Schedule that establishes duration and responsibility for all major activities during all Phases of the Project. The Project Master Schedule shall coordinate and integrate the Construction Manager's services, the architect's services, Contractor's responsibilities and the School District's responsibilities with regard to anticipated design and construction.
- Monitor the Project Master Schedule and report to the School District and architect/engineer the progress during the pre-construction and pre-bid phases and will notify the School District and the architect of any delays or problems and will recommend any corrective action necessary to meet the time requirements for the project.
- During the completion by the architect of the construction documents, update the Project

Master Schedule so as to develop a detailed Construction Schedule for inclusion in the bidding documents to be made available to bidders on the project.

4. **Cost Estimating and Budget Analysis Services:**

- Establish and maintain an accurate and up-to-date construction cost accounting system.
- Prepare a minimum of three (3) detailed cost estimates for the building, construction and site development work. One (1) estimate will be provided at the completion of schematic design, one (1) at the completion of the design phase, and one (1) at the completion of construction documents.
- The Construction Manager will use capital projects software to maintain project records.
- For each project undertaken during the term of the resultant contract, prepare a projected project cashflow statement after contract award. The projected project cashflow statement shall be updated and re-issued at least on a monthly basis or at such other interval as determined or requested by the School District.

5. **Pre-Construction and Bidding Phase:**

- Review construction documents and offer recommendations on construction and logistics prior to establishing bid date.
- Develop construction-phasing schedule to be included in contract documents.
- Prepare a schedule that incorporates tasks of the entire team during the design phase and the construction phase.
- Monitor the project master schedule and report to the School District and architect, the progress during the pre-bid phase and bidding phases, notify the School District and the architect of any delays or problems and recommend any corrective action necessary to meet the time requirements for the project.
- During the completion by the architect of the construction documents, update the Project Master Schedule so as to develop a detailed construction schedule for inclusion in the bidding documents to be made available to bidders on the project.
- Establish and maintain an accurate and up-to-date construction cost accounting system.
- Prepare detailed cost estimates at various intervals of the project beginning at the completion of the schematic design through completion of construction documents.
- Assist the Design Firm with local labor market conditions and availability of construction materials as they affect design choices and construction costs.
- Undertake value engineering studies of alternative systems, with respect to manufacturers and vendors of items with long lead times, to obtain the most economic benefit from a cost standpoint while maintaining the School District's functional and program requirements.
- Assist the architect/engineer in developing a multiple prime bid strategy. Review the bid packages as prepared by the architect/engineer for each trade including scope definition, terms and conditions, insurance and bonding requirements. Conduct pre-bid conferences, solicit local bidder interest for this project and maximize competition to achieve the best bidding results for the School District.
- Assist the School District and architect/engineer in evaluating the responsiveness and completeness of construction bids received.

- Review and make recommendations to award contracts to successful bidders.

6. **Construction Phase and Closeout**

- Assist the School District in selecting and coordinating the professional services of surveyors, special consultants and testing laboratories required for the project.
- Presence at pre-construction conferences, job meetings, and special meetings as necessary, to be attended also by the architect/engineer, the School District, and/or the Contractors performing the work on the project.
- Establish and maintain an on-site office in office space provided by the School District.
- Provide Construction Project Manager(s) to oversee and coordinate contractors, to expedite their work and maintain quality control and conformance to the contract documents. The construction inspection services shall be thorough, examining all construction work for conformance to the design plans and specifications, performed on a daily basis for all trades and for each construction project.
- The Construction Project Manager(s) shall review and fully comprehend the scope of work outlined in the contract bid documents, drawings and specifications. Copies of the Contract Bid Documents shall be maintained at the site and be made available for referencing by the architect/engineer and School District and be used by the Construction Management Team. The Construction Project Manager shall prepare and maintain a current master record copy of drawings showing all changes to the contract drawings.

III. INSURANCE

The Construction Manager shall provide Workers' Compensation, automobile, comprehensive general liability and professional liability (Errors and Omission) insurance in amounts set forth herein. All policies shall be in a form, with a deductible, and with a New York State licensed and admitted carrier. Promptly upon signing the construction management services agreement, and thereafter as necessary or requested, the Construction Manager shall provide the School District with proof of the required insurance coverages. Simultaneously with the execution of this Agreement, Construction Manager shall deliver insurance policies and certificates to School District which will provide at least a 30-day notice of cancellation or amendment.

Required Insurance:

1. Minimum Required Insurance:
 - a. **Commercial General Liability Insurance**
 \$1,000,000 per Occurrence/ \$2,000,000 Aggregate with coverage for sexual misconduct
 \$2,000,000 Products and Completed Operations
 \$1,000,000 Personal and Advertising Injury
 \$100,000 Fire Damage
 \$10,000 Medical Expense
 - b. **Automobile Liability**
 \$1,000,000 combined single limit for owned, hired, borrowed and non-owned motor vehicles.

c. Workers' Compensation and NYS Disability Insurance

Statutory Workers' Compensation (C-105.2 or U-26.3); and NYS Disability Insurance (DB- 120.1) for all employees. Proof of coverage must be on the approved specific form, as required by the New York State Workers' Compensation Board. ACORD certificates are not acceptable. A person seeking an exemption must file a CE-200 Form with the state. The form can be completed and submitted directly to the WC Board online.

d. Professional Errors and Omissions Insurance

\$2,000,000 per occurrence/\$2,000,000 aggregate for the professional acts of the consultant performed under the contract for the District. If written on a "claims-made" basis, the effective date must pre-date the inception of the contract or agreement. Coverage shall remain in effect for three years following the completion of work.

e. Umbrella/Excess Insurance

\$3,000,000 each Occurrence and Aggregate. Umbrella/Excess coverage shall be on a follow-form basis or provide broader coverage over the required Auto Liability (where applicable), General Liability and Professional Liability coverages.

The Construction Manager acknowledges that failure to obtain such insurance on behalf of the School District constitutes a material breach of contract and subjects it to liability for damages, indemnification and all legal remedies available to the School District. The Construction Manager is to provide the School District with a certificate of insurance, evidencing the above requirements have been met, prior to the provision of services. The failure of the School District to object to the contents of the certificate or the absence of same shall not be deemed a waiver of any rights held by the School District.

2. Notwithstanding any terms, conditions or provisions, in any other writing between the parties, the professional consultant hereby agrees to effectuate the naming of the School District as an additional insured on the professional consultant's insurance policies, except for workers' compensation and N.Y. State Disability insurance.

IV. THE SELECTION PROCESS

A. Timetable

The School District is expected to undertake the selection process according to the following schedule:

Deadline for submission
of proposals:

May 15, 2025 at 10:00 a.m.

Interview with finalists:

The School District anticipates that interviews of the finalists will be held on May 19, 2025. Dates and times for interviews shall be finalized after submission of

proposals. Interviews will be conducted by the Board of Education and District Administration.

Selection of firm: upon Board of Education approval on or about June 10, 2025

Contract review and execution: to be scheduled with the School District's legal counsel following selection of firm by the Board of Education

B. Site Visits

An informational meeting/site visit will be held on April 29, 2025 at 10:00 a.m. Potential respondents are asked to gather at the District's Administrative Offices, East Islip Union Free School District, 1 Craig B. Gariepy Avenue, Islip Terrace, New York 11752 at which time they will be escorted to the sites of possible future renovation and repair work, as determined by the School District. It is highly recommended that all potential respondents attend. Failure to attend this meeting does not absolve the respondent from compliance with all terms and conditions of the RFP or any resultant agreement. Respondents may also visit the buildings by making prior arrangements with Jenny Bejarano, Purchasing Agent at 631-224-2031. No one may visit the building or site without an appointment.

C. Proposal Evaluation Criteria

Proposals will be evaluated on the basis of the following criteria:

1. Experience and Qualifications of the Proposer: Consideration will be given to proposers demonstrating strong capabilities, experience and reputation in undertakings similar to those described in this RFP, and providing authoritative documentation of their financial soundness and stability. Similar experience will be understood to include, but not be limited to:
 - a. At least ten (10) years' experience in the provision of construction management services on projects involving school district renovations, alterations and/or additions;
 - b. At least ten (10) projects in school district expansions, renovations and upgrades.
2. Ability to Implement District Projects Promptly: Preference will be given to proposals demonstrating an ability to carry out the tasks and responsibilities outlined in the proposal in a prompt and efficient manner. The capability of the construction management firm to progress and complete the work will be evaluated taking into consideration size of work force, current workload, in house staff capabilities and the like.

3. Level of client satisfaction determined from supplied references.
4. Logistics and familiarity with the geographic area.
5. Experience and qualifications of the professional staff to be assigned to this project.
6. Proposed methodology and demonstrated understanding of the project requirements and School District needs, including the need for a team effort with the School District and other construction professionals.
7. Demonstrated knowledge of:
 - a. New York State Education Department Project Application and Approval Process
 - b. New York State Education Department Office of Facilities & Management Services Forms
 - c. Application and Certificate for Payment (Form AIA Document G702CMA)
 - d. Green Building Design and New York State Education Department CHPS knowledge and experience.
 - e. New York State Education Department Change Order Process.
8. Fee for services to be provided in a separate sealed envelope marked "Fee Proposal".
9. Insurance: Ability to provide the insurance required in the attached sample agreement.
10. Pending Litigation and Insurance Claims: Provide a list of all pending litigation against Proposer. Also provide a list of any pending insurance claims filed with Proposer's current or previous insurance carrier and the nature of such claims.
11. References

V. RFP PROCEDURES

A. Information and Documents

Questions concerning the RFP and the procedures for responding should be directed in writing to Jenny Bejarano, Purchasing Agent at jenny.bejarano@eischools.org. Questions, in writing, must be received no later than at 2:00 p.m. on May 2, 2025. Responses to questions posed will be answered in writing and distributed to all prospective Proposers.

B. Submission of Proposals

Respondents should submit an original and five (5) copies of their proposal. Respondents should also submit an original and five (5) copy of their fee proposal in a sealed envelope that is clearly marked "Fee Proposal". Proposals must be received no later than 10:00 a.m. on May 15, 2025 at the District's Administrative Offices, East Islip Union Free School District, 1 Craig B. Gariepy Avenue, Islip Terrace, New York 11752. To prevent opening by unauthorized individuals, your proposal should be clearly identified on the envelope wrapper as follows: "CONSTRUCTION MANAGEMENT RFP" and should be addressed to Jenny Bejarano, Purchasing Agent, East Islip Union Free School District.

C. Modification or Withdrawal of Proposals

Any proposal may be withdrawn or modified by written request of the Proposer, provided that such request is received by the Purchasing Agent at the above address prior to the date and time set for receipt of proposals.

D. Right to Reject Proposals

This RFP does not commit the School 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 School District intends to award a contract on the basis of the best interest and advantage to the School 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 to request additional information or clarification from any firm that submitted a valid proposal, or to cancel this RFP in part or in its entirety, if it is in the best interest of the School District to do so. The School District may select as the successful proposer that proposal which, in the School District's sole discretion and with whatever modifications the School District and the proposer may mutually agree upon, best meets the School 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 as and to the extent that the School District, in its sole discretion, shall enter into a contract with the proposer that it selects as the successful proposer.

VI. PROPOSAL FORMAT AND CONTENTS

Proposals must be submitted in the format outlined in this section. Each of the described parts and sections must be completed in full (except those sections described as optional). Each proposal will be reviewed to determine if it is complete prior to actual evaluation. The School District reserves the right to eliminate from further consideration any proposal deemed to be non-responsive to the requests for information contained herein. Each of the parts and sections described below should begin on a separate page, and each page should state the name of the proposer in the upper right hand corner.

A. Proposer Background and Qualifications

Section A of the proposal must contain the following information about the proposer and any independent contractor with which the proposer intends to work on the project.

FORM I: Form I should describe the overall make-up of the project team, and a detailed statement as to how the Proposer intends to meet the needs of the School District. Proposers should include a chart depicting the management structure envisioned for the projects. Include the size of the firm and the location of the office from which the work of this contract is to be performed. Provide a listing of all in-house services provided (i.e. architectural, engineering, site planning, surveying, environmental, etc.).

FORM II: Form II should provide information about the Proposer and each independent contractor/consultant to be used by the successful Proposer to provide the services to the School District, if applicable. (Addresses, telephone/fax numbers, names of contact person and lead person, qualifications licenses and statement of insurance coverage.) Individual résumé for each of the individuals on the project team must be included in this section.

FORM III: Describe the prior relevant experience of the Proposer and members of the project team, and independent contractors, if any. For each include the information listed below:

1. Customer's name.
2. Total project capital cost.
3. Type of contract.
4. Name & telephone number of reference for the project.
5. Brief description of the project's scope of services and status (including type of facility at which project was implemented, whether the project was timely completed and whether significant problems occurred that affected project performance). The right to call the reference and/or visit the project sites provided by the Proposer will be presumed by the School District.
6. Photographs or video of any projects in school districts including expansion projects, renovations projects and upgrade projects.

FORM IV: (optional) include any additional information about the project team, its personnel, financial condition, or qualifications regarded as being pertinent.

B. Financial Background Information

Section B of the RFP must contain detailed information concerning the financial background of the Proposer and any independent contractors to be engaged by the Proposer, including but not limited to financial statements, annual reports and the like covering the most recent fiscal year for the proposer.

C. Form of Proposal

Proposals submitted pursuant to this RFP shall include the Proposer's cost to perform the services set forth herein. Said cost shall be structured as a sliding scale based on a percentage of the construction cost, to be paid to the successful proposer in accordance with the terms of the resultant Contract and shall be submitted as FORM V of this RFP in a separate sealed envelope marked "Fee Proposal."

D. Form of Agreement

The School District does not intend to use an AIA Standard Form contract in connection with the services to be provided herein. The terms of said agreement are annexed to this RFP. **The School District reserves the right to amend the terms of the attached agreement.**

VII. CONSTRUCTION MANAGER INFORMATION FORM

Name of firm, address, and contact information for your firm's main office:

Firm: _____

Address: _____

City, State, Zip: _____

Telephone: _____ Fax: _____

Email Address: _____

Name, title, address, and contact information for 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: _____

Email Address: _____

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: _____

Email Address: _____

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 FORM FOR CONSTRUCTION MANAGEMENT SERVICES

Fee Proposal for Construction Management Services:

The School District is requesting proposals for the 2025-2026 school year on a sliding scale percentage based on the amount approved by the voters for the School District's capital improvement program for the 2025-2026 school year and any renewals. Percentage fees will be applied to the construction costs for projects approved by the District's voters. The fee is subject to adjustments based on the actual construction costs.

- Fee based on voter authorization ranging from \$0-\$3,000,000 _____%
- Fee based on voter authorization ranging from \$3,000,001-\$6,000,000 _____%
- Fee based on voter authorization ranging from \$6,000,001-\$10,000,000 _____%
- Fee based on voter authorization over \$10,000,000 _____%

In addition:

Proposers must include, as a separate line item in their proposals, the cost for provision of a trailer for the Construction Manager's use. Should the District elect to provide office space to the Construction Manager, such sum shall be credited to the District.

Proposers will be compensated for the provision of additional services on an hourly basis. Each proposer shall submit an hourly rate schedule for this purpose as part of its fee proposal. All hourly rate schedules must include the position and corresponding rate for each team member.