



March 2, 2018

ITB# 21240 – Garrett Morgan – HVAC Upgrades 2018

Pre-Bid Meeting Agenda

I. Introductions

- a. Owner – Cleveland Metropolitan School District (CMSD), Cleveland, Ohio
 - i. Seletha Thompson, CMSD Purchasing Analyst
 - ii. Linda R. Jones, CMSD Procurement Specialist
 - iii. Bob Kasler, CMSD Trades Director
- b. Criterion Engineer/Owner's Advocate/ Consultant: AGM Energy Services
 - i. Andre' T. Goosby, President
 - ii. Lucas Hoffman, Project Manager
 - iii. Jacob Puschel, Systems Integration

II. Project Site

- a. Garrett Morgan Academy: 4016 Woodbine Avenue, Cleveland, OH 44113

III. Procurement Requirements

- a. Letters to Bidders
- b. Instructions to Bidders
- c. Required Submitted Forms
 - i. Acknowledgement
 - ii. Vendor Request Form
 - iii. Taxpayer ID Form (W-9)
 - iv. No Bid Form
 - v. Conflict of Interest Form
 - vi. Certificate of Debarment
 - vii. Addendum Acknowledgement Form
 - viii. Bidder Qualification Form
 - ix. Certificate of Liability Insurance
 - x. Non-Collusion Affidavit
 - xi. Diversity Business Enterprise Participation Forms
 - DBE Form A – Proposed DBE Subcontractor Participation
 - DBE Form B – Goal Acknowledgement

- DBE Form C – Schedule MBE/FBE Participation
- DBE Form D – DBE Letter of Intent
- DBE Form E – DBE Unavailability Certification
- DBE Form F – Joint Venture
- xii. **Affirmative Action Program**
 - **Form 1 - Vendor Contract Compliance Form**
 - **Form 2 – Compliance Declaration**
 - **Employment Data Form**
- xiii. **Sample Construction Agreement**
- xiv. **Bid Form**
- xv. **Bid Bond** - CMSD requires 10% Bond for this Work
- xvi. **Vendor Questions Due Date March 8, 2018 at 12:00 PM.**
- xvii. **Proposals Due March 23, 2018, 1:00 PM current local time at**
Cleveland Metropolitan School District located at 1111 Superior Avenue E, Suite 1800,
Cleveland, Ohio 44114

IV. Project Review: Bob Kasler; AGM Energy Services Team

- a. Describe Expected Work : Refer to Bid Form and Owners Program of Requirements (OPR) Docs
 - i. Project Site:
 - Garrett Morgan Academy: 4016 Woodbine Avenue, Cleveland, OH 44113
 - ii. BASE Scope:
 - Provide and Install Mini-split heat pumps in noted rooms.
 - Install noted Systems-Integration components.
 - iii. ALTERNATE 1:
 - Demolish and Remove existing Unit Ventilator equipment in rooms under BASE Scope work.
 - iv. ALTERNATE 2:
 - Provide Extended Maintenance Plan for newly installed Mini-Split Equipment.
- b. Describe Delivery of the Work – Design-Build/Performance-based Proposals w/ Lump Sum Bid & Schematic Technical Proposal
- c. Describe Anticipated Timeframes
 - i. Vendor Selection – May 4, 2018
 - ii. Contract Award – June 4, 2018
 - iii. Construction & completion by June-July 2018.

V. Project Framework and Delivery – CMSD & AGM

- a. Single Agreement with CMSD (This Project is NOT standard “Plan-&Spec”)
 - i. Options for Separate & Combined Proposals – Not Applicable
 - ii. Final Planning & Design (this includes applicable plan reviews, permits and approvals).
 - iii. Coordination & Project Management.

- iv. Complete Turn-Key Installation (Contracting) of HVAC Upgrades.
- v. CMSD requires 10% Bond for this Work/Proposal
- vi. Standard Design E & O Insurances are required – as applicable.
- vii. Technical Proposal Items – Refer to OVERALL Specification Section
 - Contractor/Sub-Contractor Declarations
 - Project Team & Management
 - HVAC Manufacturers and Preliminary Design information
 - a. Main System Configurations (as different from planned).
 - HVAC and Electrical Power Preliminary Design information
- viii. Confirmation of Project Schedule targets
- b. Proposal Evaluations
 - Selection Criteria: Best Value of Price, Schedule & Scope Confirmation.
- c. Recommendation/Selection of Best VALUE Proposal: **May 4, 2018**
- d. Final Award of selected Proposal: **May 4, 2018**
- e. Construction Phase
 - i. Begin, Upon CMSD Approvals & Valid Notice-to-Proceed
 - ii. Substantially Complete Construction work by **July 31, 2018**
 - iii. Complete Commissioning of Project by **July 31, 2018**

VI. Important Discussion Items:

- a. Work Access: buildings are fully occupied during normal school hours. Construction activities after are possible, but limited to days/times when standard staff/cleaning/children-occupied schedules allow. Non-standard construction activity Schedules will need to be worked-around (no free access can be planned for, but District is committed to coordination to help project).
 - i. Overtime/Shutdown/Weekend Efforts are expected to complete Work in time.
 - ii. Parking – available.
- b. Security: Background checks and Screening/Badging may be required.
- c. Specific Construction Items:
 - i. Coordination with District is required with respect to specific room access and priorities.
 - ii. Cleanliness – daily requirement for all areas.
 - iii. As-built Documents – must provide accurate records for Mechanical and Electrical.
 - iv. Project Meetings
 - Safety & Normal Progress Meetings arranged by Proposer.
 - Periodic Meetings with CMSD & AGM are required.

VII. Site Visit/Walk-Thru

- i. Planned Subsequent Times
 - **March 6, 2018 at 3:00 PM**
- ii. Others as arranged/pre-approved by CMSD/AGM.

VIII. **Anticipated Project Schedule – Purchasing**

- a. Subsequent Questions after Pre-Bid Meeting:
 - i. Seletha.Thompson@Clevelandmetroschools.org
 - ii. **No Voice** Questions Allowed.
 - iii. CMSD will publish all pertinent Non-PROPRIETARY information/answers to ITB via Addendum
 - Addendum will be released no later than March 16, 2018
- b. **Proposals Due: March 23, 2018, 1:00 PM current local time at Cleveland Metropolitan School District located at 1111 Superior Avenue E, Suite 1800, Cleveland, Ohio 44114**
- c. Include all CMSD Required Forms as discussed;
 - i. Bid Form
 - Pricing - Lump Sum Amount
 - Standard CMSD/ORC Bonding requirements apply
 - ii. One original with blue ink signatures, two (2) copies and one (1) electronic format bid on a USB flash drive.
- d. Bid Evaluations
 - Vendor Selection Criteria: Best Value of Price, Schedule & Scope Confirmation.
- e. Recommendation/Selection of Best VALUE Proposer: **May 4, 2018**
- f. Final Award of selected Proposal: **May 4, 2018**
- g. Construction Phase
 - i. Begin, Upon CMSD Approvals & Valid Notice-to-Proceed approximately June, 2018

IX. **Questions**

This Meeting Agenda and any subsequent NOTES published are to be considered a part of the Bid Documents being used to prepare the HVAC Upgrades Proposals requested. Please notify the writer if any items are not clear enough as stated or omitted as understood from the discussions.

ITB #21240: Garrett Morgan – HVAC UPGRADES 2018

Pre-Bid Meeting

March 2, 2018 – 10:00 a.m. – Trades Office

Name	Company Name & Phone Number	Email
Daniel Trovabetto	(216) 798-5307 Air Force ONE	dtrovabetto@airforceone.com
Aronie T. Goosby	AGM ENERGY SERVICES	AG00SR1@AGMENERGYSERVICES.COM
KACRONEK O'CONNOR	BG	KACRONEK@BAGLERS-GARRETT.COM
Seletha R Thompson	MSD	SelethaThompson@Clevelandmetro schools.org
Linda Jones	QSMO	Linda.K.Jones@ Clevelandmetro-schools.org