



**REQUEST FOR PROPOSALS**

**MAGNOLIA SCIENCE ACADEMY, SANTA ANA  
CONSTRUCTION MANAGEMENT SERVICES  
GYMNASIUM PROJECT**

**Posted**

July 19, 2017

**Submit Responses To:**

Frank Gonzalez  
Magnolia Public Schools

**RFP Due Date:**

July 31, 2017

No Later Than 5:00 P.M.

**MAGNOLIA EDUCATIONAL & RESEARCH FOUNDATION**  
250 EAST 1<sup>ST</sup> STREET, SUITE 1500  
LOS ANGELES, CA 90012

## CONSTRUCTION MANAGEMENT SERVICES

The Magnolia Educational & Research Foundation (“Magnolia”, “Magnolia Public Schools” or “Charter”) is requesting Proposals for Construction Management Services for work associated with the bidding and construction of various charter school capital improvement projects, including the construction of a gymnasium. The acquisition and design of the project, as well as the construction of the classroom building was financed through a state bond measure (Proposition 1D). The construction of the gymnasium will be paid for by private financing, scheduled to close by July 31, 2017.

The purpose of this Request for Proposals ("RFP") is to obtain information that will enable Magnolia to select a Construction Management Firm to manage the completion and acceptance of the gymnasium project within budget (\$3.7 million, including Construction Management Services) and ready for occupancy by August 1, 2018. Each Construction Management firm responding to this RFP should be prepared and equipped to provide comprehensive construction management services on behalf of the Charter in an expeditious and timely manner to enable the Charter to meet critical time deadlines and schedules.

Accordingly, the Charter is requesting proposals from qualified firms, partnerships, corporations, associations, or professional organizations to provide comprehensive, professional construction management services to the Charter in accordance with the information and criteria set forth herein. Extensive California public school experience and knowledge of the State process is sought from candidates submitting proposals in response to this RFP, in addition to other criteria and qualifications as set forth herein.

Proposals shall be in accordance with the “Format for Proposal Submission” as set forth in Section II, below, and must be to the attention of **Frank Gonzalez, and delivered to the Magnolia office no later than 5:00 p.m. on July 31, 2017**. Late proposals will not be considered. Each proposal shall be treated as confidential until this deadline, after which time each proposal shall become a matter of public record.

In order to allow Magnolia Public Schools to make an informed decision regarding the selection of a consultant among responsible and responsive candidates, the proposal must contain the following elements or evidence that the firm meets or exceeds the requirements stated herein.

Proposals may consider the following:

**D) SCOPE OF WORK**

**A) GENERAL**

- 1) Work with Magnolia Public Schools staff, architects, consultants, general contractors, sub-contractors and all other required agencies for the successful completion of a State funded project;
- 2) The consultant and assigned personnel selected will be precluded from performing architectural or construction services;
- 3) Assist the Charter and in determining construction budget and cost estimates; and,
- 4) Work with the Charter in the coordination and quality control of all project documentation. Prepare progress/status reports for cost, schedule, quality, etc. Reports are required throughout the duration of the project to be submitted on monthly basis (or as needed) for review by the Charter.

**B) BID/AWARD CONSTRUCTION MANAGEMENT PHASE**

- 1) Assist Magnolia in its efforts to generate local bidder participation in the construction program, and provide information regarding upcoming projects to local bidders;
- 2) Coordinate and assist the Charter in the generation of “request for advertisement” forms for projects entering the bid process. The Charter shall place public advertisements for upcoming project bids;
- 3) Develop and issue project specifications and general conditions in cooperation with Architect and Owner’s Authorized Representative;
- 4) Coordinate and conduct, in conjunction with the Charter and its architect, project pre-bid conference(s);
- 5) Coordinate with the Charter and its consultant(s) to document and formally respond to bidder inquiries. Work with the architect to issue addendum documents for bid packages, when necessary. Advise the Charter of cost, schedule and construction impacts resulting from the inclusion of addendum documents for bid packages;
- 6) Assist the Charter and the Charter’s architect in the issuance of the Notice of Award and Notice to Proceed for each construction contract.

### **C) CONSTRUCTION MANAGEMENT PHASE**

- 1) Consultant and assigned personnel shall be fully experienced in the coordination of construction projects utilizing identified construction delivery methodologies;
- 2) In conjunction with the Charter and the Charter's architect, coordinate and conduct project pre-construction conferences;
- 3) Consultant and assigned personnel shall work with Charter and its architects to insure existence and maintenance of complete files of all project documentation which shall include but not be limited to the following: design documents, estimates, bid documents, construction contracts, payment invoices, requests for information ("RFIs"), contractor's submittals and shop drawings, change orders, claims, schedules, and correspondence;
- 4) Serve as the Charter's representative along with other consultants, including the Charter's architects and inspectors, for the administration of the construction contract(s) as provided under the General Conditions of each project. When appropriate, make recommendations to the Charter for exercising the Charter's prerogatives under the construction contract(s) for the project;
- 5) Implement and coordinate the Charter's construction standards. Consultant and its assigned personnel shall adopt standard procedures for document control and formats as identified for the documents including, but not limited to, bid documents, contract documents, payment invoices, schedules, program status reports, requests for information (RFI), change orders, claims, etc. The consultant, working with the Charter and its architect, must assist with the development and maintenance of a cost loaded multiple project schedule detailing all project activities and implement logging and tracking of all project related information, including, but not limited to, contracts, payments, correspondence, and cost worksheet data;
- 6) Attend all regular job-site progress meetings, distribute meeting minutes, unless otherwise noted or agreed to by Charter or its other consultants and representative(s);
- 7) Along with the project architect and Owner's Authorized Representative, coordinate activities with the Charter's Inspector(s) of Record ("IOR") for each project and other technical inspection and testing agencies. File and distribute as appropriate all inspection reports;
- 8) Receive and review the Contractor's detailed cost-loaded baseline construction schedule for conformance to the contract requirements. Receive and review the Contractor's detailed "Schedule of Values" for front end loading and compliance with contract requirements. Distribute the approved schedule to the Charter, the Charter's architect, and other involved parties;

- 9) Utilize the Contractor's approved baseline schedule and schedule of values to establish, update, maintain and distribute the project schedule;
- 10) Receive and review the Contractor's monthly schedule update and progress payment request. Review and confirm monthly Contractor payment requests with Charter architect and IORs. Review the progress of construction and observe work in place and stored materials, and evaluate the percentage complete of each activity shown on the contractor's construction schedule. Identify with the contractor any current or potential delay(s) to the completion schedule, and require appropriate contractor corrective action, including submittal or recovery schedule(s), where appropriate or advisable. Review certified payroll and verify compliance with applicable (e.g., administrative) guidelines, as requested or directed by Charter;
- 11) Work with the Charter's architect in the evaluation of contractor change order proposals ("Change Orders") for time and price, and make recommendations for Charter action. Assist the Charter and Charter architect in the negotiation of Change Order cost and time extensions, and requirements for documenting Change Orders, and document packaging pertaining to Change Orders. Provide project cost estimating, as requested by Charter;
- 12) Prepare, file, and distribute Project Status Reports as requested by the Charter. Prepare and distribute logs reflecting status of Change Orders, claims, contractor submittals, shop drawings and RFIs;
- 13) Perform a claim entitlement analysis of all contractor claims, including but not limited to, an analysis of the impact on cost(s) and project schedule, and prepare recommendations to the Charter and Charter architect regarding appropriate action and response to contractor claims. If requested by the Charter, negotiate claims from the Contractor on the behalf of the Charter, including recommendations concerning settlement, in conjunction with and subject to recommendations of Charter legal consultants;
- 14) Coordinate the receipt and storage of Charter-furnished, contractor installed materials and equipment;
- 15) Assist and coordinate with the Charter architect and IOR to prepare a "punch list" of items pending substantial and final completion of a project(s). Verify to Charter and Charter architect the contractor(s) completion and corrective action for each punch-list items, and recommend actions in event of contractor's failure to take corrective action or other necessary actions relative to said punch list;
- 16) Schedule, coordinate and assist the Charter in the occupancy of the completed project or portions thereof.

## **D) CONTRACT CLOSE-OUT**

- 1) In association with the Charter's architect and Owner's Authorized Representative, receive and review operations and maintenance manuals, and warranties and guarantees as required under the contract provisions.
- 2) In association with the Charter's architect and Owner's Authorized Representative, receive and review project record drawings and as-builts, and assist the Architect and Contractor in the filing of these documents with the Charter. (Note: Format of record drawings to be determined for each project, usually hard copy plus AutoCAD and PDF).
- 3) Coordinate and schedule training sessions for Charter personnel, and verify that the Contractor's obligations are fulfilled.
- 4) Make a final review of the project(s) in conjunction with the Charter's architect, Owner's Authorized Representative and IOR at the conclusion of all corrective action. Provide a report to the Charter indicating whether the work is acceptable under the contract documents (including any addenda or change orders), and recommend final payment and the recordation of a notice of completion in conjunction with the Charter's architect and other Charter representatives or staff.
- 5) Assist the Charter and the Charter's architect in the preparation and submittal of the final project accounting and closeout report(s) including (but not limited to) all Division of State Architect ("DSA"), California Department of Education ("CDE") and State Allocation Board ("SAB")/Office of Public School Construction ("OPSC") forms as may be required or needed.

## **E) POST CONSTRUCTION FOLLOW-UP**

- 1) Provide the Charter and Charter architect with one (1) year post construction follow-up for Contractor warranty and guarantee items.

## **II) PROJECT DESCRIPTION**

The scope of the project includes construction of the Gymnasium building, connecting utilities from the pull boxes already existing at the site as shown in the drawings and portion of site work including lunch tables, benches and 2 shade structures as shown in drawings/specifications.

The gymnasium building is a 6,509 sqft, Type V A, fully sprinklered building with automatic fire alarm system. It is a CMU building with steel and metal deck roof structure and metal stud framing.

The drawings and specifications including the general conditions are already approved by DSA, see APP 04-112861 in the tracker. DSA box is already operational based on the completed school building is still in operation. Portion of the DSA approved buildings and site is already built. The area built is already updated in the DSA box by the IOR and the A-E consultants and has no deviations. The site has existing functional school building with finished site work, parking, fire lane, landscaping and utilities.

The building pad is already available, built during the construction of the school building and the associated site work and certified by the owner's Geotechnical engineer. The owner to provide the certification.

The school is operational and the area of the construction must be fenced off to ensure proper safety and functioning of the existing school and their needs. The CM firm shall determine and provide a special condition section that deals with special site conditions of this project including issue related to site access to the construction site, staging areas, protecting the already built elements, construction related safety, maintaining access to the fire lane, etc. Please note that part of this project is closed and obtained DSA certification #1 for the DSA project APP 04-112861.

The duration of construction for the Gymnasium and associated site work is anticipated to be nine (9) months.

### III) FORMAT FOR PROPOSAL SUBMISSION

#### A) GENERAL INSTRUCTIONS

All proposals are to be submitted in compliance with the format set forth below and in the order as outlined to facilitate evaluation by the Charter of the candidate's ability to meet or exceed the specified requirements under the heading "Scope of Work."

The proposals shall be presented in a bound 8-1/2 inch by 11-inch (vertical) format. Submit **three (3) hard copies and one (1) electronic copy in PDF format via email** of each proposal. All submittals shall be tabbed for easy referral to the numbered answer. All submittals shall become the property of the Charter and will not be returned.

Clarifications or questions regarding submittals must be submitted in writing to Frank Gonzalez, via email to [fgonzalez@magnoliapublicschools.org](mailto:fgonzalez@magnoliapublicschools.org). Please include the name of your firm and telephone number when making inquiries. All proposals are due **no later than July 31, 2017, 5:00 p.m.**

**SPECIAL NOTE: Individuals and firms responding to the RFP are cautioned not to contact school Board Members, Magnolia leadership, staff or existing consultants without the express permission of Frank Gonzalez. Failure to observe these criteria could potentially result in disqualification.**

## **B) FORMAT REQUIREMENTS:**

The sequence to be followed is as follows:

### **1. Cover Page**

- a. Name of Firm
- b. Project Title – Proposal for Construction Management Services, MSA Santa Ana Gym Project
- c. Date Submitted – **July 31, 2017**

### **2. General Information**

- a. Name, address, telephone, and e-mail address of firm, name and email for contact persons.
  - b. License number, type of license, State of license or registration;
    - i. Legal form of firm (i.e. corporation, partnership, etc.).  
Please state the year your firm or organization was established;
    - ii. Number and names of principals in the firm;
    - iii. Number of employees;
  - c. Provide a short resume of your firm's principals, including registrations/licenses and State (Please limit to one page per person);
  - d. Short resume of key personnel to be assigned to this project, included position. (Please limit to one page per person), with each resume containing the following information/;
    - i. Project-specific responsibilities and description of work to be performed;
    - ii. Estimated percentage of the individual's time that will be devoted to the project;
    - iii. Specific qualifications;
    - iv. Years with the firm;
    - v. Number of projects of similar nature performed by subject of resume;
    - vi. Position held and responsibilities on work of similar nature; and,
    - vii. Education, licenses held, qualification, etc.
3. Provide information to show that your proposed team has suitable resources available to ensure satisfactory completion of the work.
  4. Experience in new school construction projects. Please provide a minimum of five (5) completed individual projects.
  5. Provide a list of at least five (5) references, including names, addresses, telephone and e-mail addresses of all contact persons with respect to projects which your firm or its senior personnel has worked on within the last ten years, and any other references you wish to provide who may provide information to the Charter regarding your firm's qualifications. List the project's owner and contractors for each reference. Please be advised that some references will be contacted.



6. Describe recent projects; ideally, public works projects, performed within the last five (5) years for which your firm or its senior personnel provided Construction Management Services. State the estimated project cost (include design, construction and administration) versus actual cost for these Projects. Provide all information regarding change orders or other construction cost adjustments relative to each project listed. Describe in full the services provided by your firm.
7. Please indicate the CM experience your firm has with respect to the following:
  - a. Construction phasing plan
  - b. Information Technology
  - c. Value Engineering
  - d. Schedule Management
  - e. Pre-Construction
  - f. Construction
  - g. Phasing around existing facilities
  - h. Budget Management
  - i. Experience with state agencies including Division of the State Architect (DSA), Office of Public School Construction (OPSC), State Allocation Board (SAB), Department of Toxic Substance Control (DTSC), and California Environmental Quality Act (CEQA)
  - j. Constructability Reviews
  - k. Estimating Services
8. Briefly describe how your firm would plan to work with the CHARTER and their other consultants, representatives and/or agents as consultant in the following areas:
  - a. Team work. Describe what tactics you will use to strengthen working relationships between the architect, engineers, contractors, consultants and Charter staff.
  - b. Assisting architect and/or engineering firms in public contract compliance (especially with respect to remaining within budget, adhering to schedules, and with respect to project deliverables).
  - c. Construction phasing to coincide with facility needs.
  - d. Handling changes needed during any of the above phases.
  - e. Claims response, participation in advising mitigation of adverse (or potentially adverse) impacts, and dispute resolution (identify type, e.g., arbitration, mediation, etc.)
  - f. Managing and coordinating the public works bidding process.
  - g. Interfacing with multiple state level and governmental agencies departments.
9. Briefly describe how your firm develops and monitors accurate project design and construction schedules, financial budgets, and cost estimates. Please include methods and philosophy for cost control and change order management for both design and construction phases, as well as construction claims dispute resolution.

10. Insurance Coverage. Each submittal must include a copy of the respondent's Certificate of Insurance. This may be marked confidential and included with the "original" (wet signature) proposal. The firm or organization shall be required to carry the following insurance:

- a. Comprehensive General Liability and Property Liability Insurance, with a minimum limit two million dollars (\$2,000,000), with the Charter named as Additional Insured and Southern California Schools Risk Management as Additional Insured;
- b. Comprehensive Automobile Liability Insurance, including owned, non-owned, and hired vehicles with minimum limit of one million dollars (\$1,000,000);
- c. Workers' Compensation and Employer Liability, statutory limit;
- d. In addition, the Charter will require a firm or organization to carry Professional Liability Insurance with minimum one million dollars (\$1,000,000) per claim per annual aggregate. Deductible not to exceed \$25,000 each claim; and

**Note:** All insurance must be issued by an insurance provider by an admitted carrier (licensed to do business in the State of California), carrying a rating of not less than A-VII in the most current A. M. Best's Insurance Guide - Property Casualty or otherwise acceptable to Owner.

11. Provide a complete list of construction related litigation within the past five years involving your firm. Include the names of the participants and a contact person and phone number. Indicate whether your firm or any predecessor firm has filed for protection under the United States bankruptcy code within the last seven (7) years. If so, provide the name of the court where filed, the case title, and the disposition of the case. Proposals failing to provide the requested information of lawsuits, litigation or claims will be considered non-responsive and will not be evaluated.

12. Include additional brochures, promotional information as desired and attach to the preceding information, which you feel may assist the Charter in evaluating your proposal.

**ALL RESPONSES MUST BE RECEIVED BY 5:00 p.m., July 31, 2017  
LATE PROPOSALS AND PROPOSALS SUBMITTED BY FACSIMILE/EMAIL WILL  
NOT BE ACCEPTED**

Proposals **must** be typewritten, concise, straightforward, and must address each requirement and question.

The Charter reserves the right to negotiate modifications with any firm as may be required to serve the best interests of the Charter and to negotiate the final contracts with the most qualified candidates.

All proposals will become the property of the Charter. Information in Proposals will become public property and subject to disclosure laws. The Charter reserves the right to make use of any

information or ideas in the proposals. All proposals will be maintained as confidential working papers until officially placed on the School Board meeting agenda.

The Charter reserves the right to reject any and all proposals and to waive any informality in any proposal received. No obligation, either expressed or implied, exists on the part of the Charter to make an award or to pay any costs incurred in the preparations or submission of a proposal. All costs associated with the preparation or submission of proposals for this RFP is solely the responsibility of the candidates.

#### **IV) BUDGETARY ESTIMATE FOR FEES:**

- A) Provide the hourly rate for each proposed job classification, and any others that may become necessary due to additional services.
- B) Provide a fully loaded fee schedule for construction management services for the project as detailed in Section II, Project Description. Please provide an estimate and breakdown of reimbursable expenses.

#### **IV. Evaluation of Proposals and Recommendation**

- A. Process: All RFP responses will be read and evaluated by a committee selected by the Magnolia CEO. Overall responsiveness and representations made within the RFP, as well as your firm's ability to connect with the MPS team are important factors in the overall evaluation process. MPS will select a firm that has the highest suitability for the work with MPS and the overall desirable approach.
- B. Award: Magnolia reserves the right to reject any and all proposals; to waive any informality in the proposal process; and to accept the proposal that appears to be in its best interests. Staff will make a recommendation to the Board of Directors to award a contract to the selected Vendor. The Board of Magnolia Public Schools will vote to award the contract at its ad hoc committee or regularly scheduled meeting.
- C. Questions and Submission: Please feel free to direct questions to Frank Gonzalez, preferably by email, as shown below.

All proposals are due **no later than 5:00 p.m. July 31, 2017**. Please deliver three (3) copies in care of the MERF address and one (1) copy by email as indicated below:

Frank Gonzalez  
c/o Magnolia Education & Research Foundation  
250 E 1<sup>st</sup> Street, Suite 1500  
Los Angeles, CA 90012  
fgonzalez@magnoliapublicschools.org  
323.422.9129 cell