

***Request for Proposal (RFP)***  
***Construction Management Services Agent (CMA)***  
***for***  
***Indianola Municipal Utilities***

August 14, 2017

Indianola Municipal Utilities is seeking proposals from qualified firms to provide Professional Construction Management services to support site selection, planning, design and construction of a new Line Shop with Electric Operation Offices.

**PROJECT DESCRIPTION**

The Owner is planning to construct a new Line Shop with Administrative Offices at the 1300 block of East Iowa Avenue in the City of Indianola, Ia. The new facility is proposed to be approximately 15,800 SF in size. The new Line Shop with Electric Operation Offices will house IMU trucks and equipment as well as electric operation offices. The proposed timeline calls for the Construction Manager to be under contract September 18, 2017 and to begin work immediately.

**GENERAL CONTRACT STRUCTURE**

The Construction Manager Agent (CMA) shall serve as the Owner's principal agent in providing the services described in the RFP. The Owner shall ultimately enter into multiple prime contract(s) with one or more Contractors for the design and construction of the facility. The contract for CMA services will include three phases with a single contract being awarded to one CMA firm. The city reserves the right to modify, postpone, and/or cancel the contract for any reason whatsoever at the conclusion of any one phase and prior to the start of a subsequent phase. The three phases, and their respective estimated duration of this project are defined as:

- Pre Construction/Design Phase (4 months)
- Contractor(s) Bidding and Awarding Phase (2 months)
- Construction and Close-out Phase (5-6 months)

**CONSTRUCTION MANAGEMENT SERVICE TO BE PROVIDED**, (shall include, but may not be limited to):

**PHASE ONE - Pre Construction/Design Phase**

1. Assist the Owner in feasibility study of the proposed site and assist in any programming needs to facilitate the building program on the site.
2. Assist the Owner in any demolition requirements to clear the site.

3. Prepare for the Owner's review an RFP for design services. Prepare and distribute the RFP to Architectural/Engineering firms. Assist the Owner in the selection and negotiation of a Design Team.
4. Construction Management Plan: The CM shall prepare a Construction Management Plan for the Project and shall make recommendations to the plan throughout the duration of the Project, as may be appropriate. In preparing the Construction Management Plan, the CM shall consider the Owner's schedule, budget and general design requirements for the Project. The CM shall then develop various alternatives for the scheduling and management of the Project and shall make recommendations to the Owner.
5. Preliminary Estimate and Budget Analysis: The CM shall analyze and report to the Owner and the Designer the estimated cost of various design and construction alternatives, including CM's assumptions in preparing its analysis, a variance analysis between budget and preliminary estimate, and recommendation for any adjustments to the budget.
6. Coordinate all permitting requirements, review compliance with local and state codes.
7. Revisions to the Construction Management Plan: During the Design Phase the CM shall make recommendations to the Owner regarding revisions to the Construction Management Plan. The Construction Management Plan shall include a description of the various bid packages recommended for the Project. Revisions approved by the Owner shall be incorporated into the Construction Management Plan.
8. Progress Meetings: The CM shall conduct periodic progress meetings attended by the Owner, Designer, and others. Such meetings shall serve as a forum for the exchange of information concerning the Project and the review of design progress. The CM shall prepare and distribute minutes of these meetings to the Owner, Designer, and others as necessary.
9. Review of Design Documents: The CM shall review the design documents and make recommendations to the Owner and Designer as to constructability, scheduling, and time of construction; as to clarity, consistency, and coordination of documentation among Contractors; and to the separation of the Project into contracts for various categories of the Work.
10. Cost Control: The CM shall prepare an estimate of the construction cost for each submittal of design drawings and specification from the Designer. This estimate shall include a contingency acceptable to the Owner, CM and the Designer for construction costs appropriate for the type and location of the Project and the extent to which the design has progressed.
11. Project and Construction Budget Revision: The CM shall make recommendations to the Owner concerning revisions to the Project and Construction Budget that may result from design changes.
12. Value Engineering Studies: The CM shall provide value engineering recommendations to the Owner and Designer on major construction components, including cost evaluations of alternative materials and systems.
13. Design Phase Change Report: The CM shall prepare and distribute Design Phase change reports that shall list all Owner-approved changes as of the date of the report and shall state the effect of the changes on the Project and Construction Budget and the Master schedule.
14. Approvals by Regulatory Agencies: The CM shall coordinate transmittal of documents to regulatory agencies and utility providers for review and shall advise the Owner of potential problems resulting from such reviews and suggested solutions regarding completion of such reviews.

## PHASE TWO: Contractor Bidding and Awarding

1. Bidder Interest Campaign: The CM shall conduct a telephone and correspondence campaign to attempt to increase interest among qualified bidders.
2. Notices and Advertisements: The CM shall assist the Owner in preparing and placing notices and advertisements to solicit bids for the Project.
3. Delivery of Bid Documents: The CM shall expedite the delivery of Bid Documents to the bidders. The CM shall obtain the documents from the Designer and arrange for printing, binding, and delivery to the bidders. The CM shall maintain a list of bidders receiving Bid Documents.
4. Pre-Bid Conference: In conjunction with the Owner and Designer, the CM shall conduct pre-bid conferences.
5. Information to Bidders: The CM shall develop and coordinate procedures to provide answers to bidder's questions. All answers shall be in the form of addenda.
6. Addenda: The CM shall receive from the Designer a copy of all addenda. The CM shall review addenda for constructability, for effect on the Project and Construction Budget, scheduling and time of construction, and for consistency with the related provisions as documented in the Bid Documents. The CM shall distribute a copy of all addenda to each bidder receiving Bid Documents.
7. Bid Opening and Recommendations: The CM shall assist the Owner in the bid opening and shall evaluate the bids for responsiveness and price. The CM shall make recommendations to the Owner concerning the acceptance or rejection of bids.
8. Analyzing Bids: Upon receipt of the bids, the CM shall evaluate the bids, including alternate bid prices and unit prices, and shall make a recommendation to the Owner regarding the award of the Construction Contract.
9. Construction Contracts: The CM shall assist the Owner in the assembly, delivery and execution of the Contract Documents. The CM shall issue to the Contractor(s) on behalf of the Owner the Notice of Award and the Notice to Proceed.

## PHASE THREE: Construction and Close-Out

1. Schedule and chair a kick off meeting with Owner to discuss the proposed work plan and special concerns to be presented at the pre-construction meeting. It is envisioned the pre-construction meeting will include all interested parties, including utilities, sub-contractors, etc.
2. Provide coordination of project activities and prepare reports and documents, as necessary, for Owner review and action.
3. Maintain at the project site, on a current basis, a record copy of all contracts, drawings, specifications, addenda, change orders and other modifications, in good order and marked to record all changes made during construction, shop drawings, product data, samples, submittals, purchases, materials equipment, applicable handbooks, maintenance and operating manuals and instructions, other related documents and revisions which are relevant to the contract work.
4. Provide weekly status reports to the Owner.
5. Review laboratory, special inspection reports and coordinate as required with the Project Design Team.

6. Facilitate and monitor contractor pay applications and make recommendations to the Owner on progress payments.
7. Administer the construction contract in conformance with the requirements set forth in the Plans and Specifications.
8. Conduct weekly construction progress meetings with the Owner, Design Team, Contractors, affected outside Agencies, general public and other consultants to discuss matters such as procedures, progress, problems, and scheduling. Prepare and distribute meeting agenda and minutes.
9. Review and process all shop drawings, project data, samples and other submittals. Establish and implement procedures for expediting the processing and approval.
10. Coordinate submittal review with the Design Team and City Departments.
11. Document all claims and maintain for account records.
12. Coordinate and schedule construction surveying.
13. Coordinate testing requirements and scheduling of material testing and inspections.
14. Review and analyze the Contractor's schedule (monthly) including activity sequences and duration, schedule of submittal and schedule of delivery for products with long lead time. Work with Contractors to maintain the project schedule to show current conditions and suggest revisions as required.
15. Recommend necessary or desirable changes in the Construction Contractors scope of work. Review and evaluate Contractors request for changes. Negotiate with Contractor and submit recommendations to the Owner supported by cost estimates related to any additional or changes in the work. If change orders are accepted by Owner, prepare change orders for signature and authorization by the Owner. Maintain a log of change requests.
16. Create and maintain "As-Built" project schedule.
17. Review pay requests and provide recommendation for contractor payments.
18. Provide construction management files to the Owner.
19. Review contract documents, plans and permits.
20. Attend field walks and meetings.
21. Monitor and enforce safety on the jobsite applicable to OSHA guidelines.
22. Maintain field diaries during construction, including a cumulative record of quantities constructed, daily and weekly reports, working day reports, change order documentation, photographs and other documentation.
23. Determine that the Contractor's work is being performed in accordance with the requirements of the contract documents. Endeavor to guard Owner against defects and deficiencies in the work. As appropriate, require special inspection or testing, or make recommendations to Owner regarding special inspection or testing or work not in accordance with the provisions of the contract document whether or not such work is fabricated, installed or completed.
24. Provide and maintain a digital photographic history of the project. Photos will also be taken of the following:
  - a. Showing existing conditions prior to construction
  - b. Disputed work items
  - c. Work that has to be duplicated replaced or removed
  - d. Completed work
  - e. Deficiencies

25. Record the progress of the project. Provide daily inspection reports. Submit written daily progress reports to Owner, including information on the contractors and the entire project, showing percentages of completion. Keep daily logs containing a record of weather, contractors work on site, number of workers, work accomplished, problems encountered, and other relevant data.
26. During the course of construction, maintain one set of plans to denote field changes or other corrections.
27. Maintain copies of all permits needed to construct the project and enforce special requirements of each.
28. Provide an initial review and one re-submittal of shop drawings and product data for conformance to the construction documents.

#### CONSTRUCTION CLOSE OUT

1. Assist the Owner's designee in administering and coordinating final inspections.
2. Assist the Owner in determining when the project or a designated portion thereof is substantially complete. Prepare for the Owner a summary of the status of the work of the contractors, listing changes in the previously issued certificates of substantial completion of the work, and recommending the times within which contractors shall complete uncompleted items on their certificate of substantial completion of the work.
3. Calculate the amount of final payment due to contractors.
4. Obtain evidence of certification of all lien releases.
5. Assist Owner with filing the project "Notice of Completion".
6. Secure and transmit to Owner, required guarantees.
7. Issue the notice of substantial completion and process the Notice of Completion.
8. Coordinate any startup requirements.
9. Deliver all equipment manuals, special equipment, spare parts, catalogs, and other materials required by specifications.
10. Collect As-Built data from contractors or design consultants.
11. Make recommendation for the release of retention.

## RFP TIMELINE

A mandatory pre-submission meeting regarding the project will be held August 24, 2017 at 1:00 PM. This meeting will take place at the Indianola City Hall, located at 110 North 1<sup>st</sup> Street. This will be an opportunity for potential bidders to visit the project site, meet with the Owner's representatives and ask any questions they have regarding the project.

The deadline for proposal submission is September 5, 2017 at 1:00 PM. Proposals are to be submitted clearly marked with the consultant's name, address and phone number. Owner reserves the right to hold interviews with any qualified consultants. If interviews will be held, they will be held for the most qualified consultants and will be scheduled for September 6<sup>th</sup> and 7<sup>th</sup>, 2017. A contract is expected to be awarded to the selected consultant by September 12, 2017.

## PROPOSAL FORMAT

Consultants are encouraged to keep their proposals brief and relevant to the specific work required. Proposals shall include the following items:

1. Provide 2 bound copies of the proposal.
2. Cover Letter expressing interest in the project.
3. The name, address and phone number of the consultant's contact person for the remainder of the selection process.
4. Any qualifying statements or comments regarding the consultant's proposal, the information provided in the RFP or the proposed contract.
5. Identification of sub-consultants and their responsibilities.
6. Statement of Qualifications
7. A listing of proposed project personnel, including personal experience and resumes for anyone involved including additional consultants.
8. Provide description of similar projects including names and current phone numbers of reference for listed projects.
9. Please provide a list of your firm's experience providing public agencies with both construction management and general contracting services over the past four years. Please include a brief description of the project and contact information to be used as reference if needed.
10. Project Understanding and Approach: A description of your project understanding and how you will approach the project.
11. Scope of Services: A description of the tasks, sub-tasks, and deliverables that will be provided.
12. A proposed Project Schedule that will demonstrate the consultant's familiarity with CPM scheduling methods.
13. Cost Proposal: The consultant is to submit a detailed cost proposal for all services and materials anticipated in completing the project. The cost proposal must be broken out for each of the three phases as described earlier in this RFP. The cost proposal can be either a lump sum or percentage of the project total. Labor hours and extended billing rates per classification of personnel will be indicated for each task as defined.

## SELECTION PROCESS

1. Proposals will be reviewed by a Consultant Selection Committee. The Committee will rank the proposals based upon the materials and costs submitted. The Committee may choose to interview two or more closely ranked firms. Upon selection Indianola Municipal Utilities will open contract negotiations with the selected firm.
2. Indianola Municipal Utilities reserves the right to reject any and all proposals. If all proposals are rejected Indianola Municipal Utilities may undertake the work by such means as they deem suitable.
3. Indianola Municipal Utilities further reserves the right to waive any formalities in the preparation and submittal of proposals.

## CONTACT INFORMATION

Questions regarding this RFP should be directed to: Mike Metcalf, Electrical Superintendent, Indianola Municipal Utilities. He can be reached by phone at (515)-962-5305 or by email at [mmetcalf@indianolaiaowa.gov](mailto:mmetcalf@indianolaiaowa.gov)