

9. CONSTRUCTION PHASE SERVICES REQUIRED

The CM shall provide construction phase services as stated in the AIA Standard Form of Agreement with KDE Amendment, including, but not limited to, the following:

- A. Mobilization of job site - Provide and maintain a fully equipped project office facility on-site to perform all required CM duties and meetings and coordination of on-site temporary facilities.
- B. Maintain full time on-site construction supervision to provide daily inspections, quality control, monitoring, coordination of the various trades, provide record drawings, and provide a daily work log. Also, assign any Owner purchased materials.
- C. Conduct monthly job progress meetings following a CM generated agenda with the Architect and all trades, and follow-up with distribution of minutes to all parties.
- D. Conduct a minimum of bimonthly on-site meeting to review safety and to insure schedule conformance as related to delivery schedules. Provide plan of maintaining original completion date with CPM scheduling updates to all parties.
- E. Provide general safety signage and posting for project and see that each Contractor prepares and submits an adequate safety program and monitoring throughout the project.
- F. Provide Owner with a monthly review of cash flow to allow investment of funds available.
- G. Review change order proposals to verify validity, purpose and cost. Review with the Architect and Owner and process change order requests as required.
- H. Review shop drawings for conformance to construction documents and, if presentable, forward to Architect for approval.
- I. Monitor certificate of insurance for expiration from all contractors and confirm Owner's builder's risk policy.
- J. Compile payment requests, verify correctness and forward to Architect for approval. CM to sign cover sheet stating that application has been reviewed and is recommended for payment.
- K. Provide Architect and Owner with a monthly analysis of all bid packages indicating amount of contract completed and remaining, monies paid, retained, and owed.
- L. Assist Architect in preparation of BG-4, conducting final inspections, approvals and Certificates of Occupancy.

- M. Assemble close-out documents required and forward to Architect for approval (i.e., as-built documents, maintenance manuals, surety releases, keys, warranties, guarantees, record drawings, and lien waivers.)
- N. Coordinate any training specified for Owner's personnel in learning to operate equipment and systems.
- O. Provide assistance to Owner throughout warranty periods.
- P. Perform services and duties in compliance with contract between Owner and CM.

Kentucky Department of Education Construction Manager Scope of Services Checklist	Provided by Construction Manager	Provided by Other Contractor	Provided by Owner	Provided by Architect/Engineer
GENERAL REQUIREMENTS				
CM Field Office and Utilities	●			
Temporary Toilets		●		
Temporary Heat		●		
Temporary Electric Power		●		
Temporary Water		●		
Temporary Barricades & Rails		●		
Temporary Fencing		●		
Periodical Cleanup		●		
Rubbish Removal		●		
Water Removal		●		
Building Trade Permits		●		
Testing		●		
Weather Protection		●		
Coordination with Utility Companies		●		
Jobsite Signs	●			
Watchman - Security		●		
Building Permit	▲		●	
Certificate of Occupancy	●	▲		
Builder's Risk Insurance	▲		●	
Progress Photographs	●			
ADDITIONAL:				
● Primary Responsibility ▲ Assists in Task				

Diagram 9.1

Kentucky Department of Education Construction Manager Scope of Services Checklist				
CONSTRUCTION SERVICES ON SITE	Provided by Construction Manager	Provided by Other Contractor	Provided by Owner	Provided by Architect/Engineer
CM Superintendent Services	●			
Trade Superintendent Services		●		
Trades Coordination	●			
Scheduling	●			▲
Field Engineering	▲	●		
Time Keeping	●			
Shop Drwg. Reference File	●	▲		▲
Record Drawings	●	▲		▲
Safety Program	▲	●		
Independent Surveyor			●	
ADDITIONAL:				
● Primary Responsibility ▲ Assists in Task				

Diagram 9.2

Kentucky Department of Education Construction Manager Scope of Services Checklist	Provided by Construction Manager	Provided by Other Contractor	Provided by Owner	Provided by Architect/Engineer
CONSTRUCTION SERVICES OFF SITE				
Principal in Charge	●			
Project Management	●			
Labor Relations Coordination	●			
Scheduling	●			▲
Direct Purchase Orders	●			▲
Accounting	●			
Expediting	●			▲
Change Order Review	▲	●	▲	▲
Shop Drwg. Submittal	▲	●		
Shop Drwg. Review	▲	●		●
ADDITIONAL:				
● Primary Responsibility ▲ Assists in Task				

Diagram 9.3

10. RESPONSE TO REQUEST FOR PROPOSALS

INSTRUCTIONS

All items below should be included in the response in the same order and in similar format. Include the Certification and signature at the end of this section.

Note: *If more than one firm is involved in a joint-venture, a complete response from each firm is required.*

A. Firm Identification: Please provide the following information about your firm:

- Name
- Address
- City/State/Zip
- Telephone Number
- Principal-In-Charge Name
- Principal-In-Charge Email Address
- Designated Contact Name
- Designated Contact Email Address
- Type of Organization (Sole Proprietorship, Professional Corporation/Association, Corporation, Partnership, Joint Venture*, Other* - If Joint Venture or Other provide details)
- Number of years firm has been in business
- Location of any branch offices

B. Personnel:

1. Provide firm organization chart. Include names of all officers.
2. List firm's total number of personnel by skill group (i.e., cost control, scheduling, superintendents, etc.)

C. Sub-Consultants:

If outside consultants are utilized to perform any of your CM services, list firms and the services they will provide on your behalf. See Firm Identification in Section (A) above.

OVERVIEW

State when the firm was founded, how it is organized, and its operating philosophy.

CONSTRUCTION MANAGEMENT EXPERIENCE

Provide the following information on completed projects of a comparable nature over the past three (3) years. (Maximum of ten projects).

- Name of Project
- Location by city and state
- Brief description of the project

- *Construction cost and year project was completed*
- *Project Manager and Superintendent Name*
- *Name of owner's representative with address and telephone number*
- *Names and addresses of architects, consultants, and general trades contractor for project*

ABILITY TO COMPLETE PROJECTS WITHIN BUDGET AND ON TIME

Choose not more than five projects listed above, that are most similar to this project and provide the following additional information:

- *Owner's Initial Construction Budget*
- *CM's Final Construction Estimate*
- *Total Number of Bid Packages*
- *Total Project Cost (Contracts and Purchase Orders)*
- *CM scheduled months for construction activities*
- *Actual months for construction activities*
- *Other demonstrated ability to procure quality contractors, maximum productivity and workmanship within budget and schedule guidelines*

PROJECT ORGANIZATION

Please provide the following information regarding your proposed project organization for this project:

- A. Organization chart, identifying all project staff members by project titles, and showing how each interacts with other staff members assigned to this project. Specifically include principal-in-charge, and project manager.
- B. Explain how you plan to provide back-up staffing to insure continuity if key staff members leave the project.

PROJECT SERVICES

- A. Describe your in-house capabilities in the following areas:
 - *Cost Estimating*
 - *Value Engineering*
 - *Life Cycle Cost Analysis*
 - *Energy Conservation and Energy Budgeting*
 - *Building Systems*
 - *Specification Writing / Coordination Experience*
- B. Discuss your plans for fulfilling the requirements for construction management services during the pre-construction phases of this project.
- C. Discuss your plans for fulfilling the requirements for construction management services during the bid and construction phases of this project.

- D. Describe your proposed method of scheduling and phasing for this project.
- E. Describe the estimating and cost control methods you propose to utilize on this project.
- F. In this type of project, what would your recommendation be for field supervision during construction (i.e., number of persons, qualifications and percent of time on the job, etc.)?
- G. Discuss your methods of value engineering and life cycle costing for architectural and mechanical/electrical work on this project.
- H. Discuss the criteria utilized in preparing bid packages for a project like this one. How will the packages fit the construction phasing?
- I. Describe how you intend to work as the Owner's representative with the project architects and other design team members.
- J. Describe your team's method of coordinating the efforts of the various trade contractors. How will you maximize the use of local area contractors/suppliers?
- K. Cite three examples of how, as CM, you have initiated corrective action when deviations from standards of quality, time or budget occurred.

EXPERIENCE WITH THE KENTUCKY DEPARTMENT OF EDUCATION

Describe your experience working with the Kentucky Department of Education staff and how you view their role in the design and construction process.

SCHOOL FUNDING

Generally describe your understanding of the funding sources that drive decisions made on Kentucky school construction projects.

REFERENCES

List not more than ten (10) client references of similar projects. Provide Owner name, contact name, address and telephone number.

SUMMARY STATEMENT

Provide a summary statement, of not more than one page, which summarizes the reasons you feel your firm is best qualified for this project.

DOCUMENTS UTILIZED WITH CONTRACT

The following documents will be utilized to execute a contract.

- A. Standard Form of Agreement Between Owner and Construction Manager with KDE Amendment
- B. KDE Construction Manager Fee Guidelines
- C. KDE Non-Collusion Affidavit

CERTIFICATION OF INFORMATION PROVIDED

The information provided herein is accurate to the best of my knowledge and can be accepted by the recipient as a true representation of:

Firm Name: _____

Signed: _____

Principal-in-Charge: _____

Date: _____