

December 16, 2024

## **REQUEST FOR PROPOSAL FOR CONSTRUCTION MANAGEMENT SERVICES**

The School District of West Salem (District) seeks construction management services involving the District's school facility improvement project consisting of: construction of a career and technical education addition with a fitness center, construction of a replacement greenhouse and renovations at the High School; construction of a gymnasium addition and renovations at the Elementary School; District-wide capital maintenance, building systems, safety, security and site improvements; and acquisition of furnishings, fixtures and equipment.

### **Expectations**

The Construction Management firm will work with the District's architectural firm I & S Group, Inc. (ISG) throughout the project. The Construction Management firm is prohibited from holding contracts for construction trades working on the project.

The expected completion date of the projects is December 2026.

### **School District of West Salem Background**

The primary District facilities reside on an approximate 100-acre campus east and west of Mark Street in West Salem, Wisconsin. The campus includes a 4k-4th grade elementary school, a grades 5-8 middle school, a grades 9-12 high school, a maintenance building, and a satellite building that houses our gymnastics and hockey programs. The District has a bus garage about a mile from the campus. The District also has an Outdoor Education Center in Monroe County, approximately 20 minutes from the campus.

The District's mission statement is to "**SERVE WITH PASSION TO IGNITE CREATIVITY, INNOVATION, AND EXCELLENCE**".

Our District enrollment has been consistent. The high school enrollment is approximately 600. The elementary enrollment is approximately 680. The District is a residential suburb with most people who commute to nearby communities.

In the past 20 years, our campus has had some updating, including the satellite building, which is named The Panther Den, a complete remodel and addition to our middle school, updates and additions to our athletic facilities and swimming pool, and a remodel and addition to our automotive education facility. The high school had a complete remodel and addition approximately 20 years ago. The elementary school was constructed about 28 years ago.

**Proposals:**

If you are interested in submitting a proposal, please include the following components in your response:

1. Please provide a letter of intent and project understanding.
2. Provide resumes and references for key personnel that will be assigned to the School District of West Salem project. Identify the role that each named individual will play. Also, indicate what other project commitments the assigned personnel will have through December of 2026.
3. Please list highly relevant experiences during the past five (5) years. Experience should include additions to occupied school facilities as well as experience with stand-alone schools. For each relevant experience, list the District administrator, project manager, general contractor and reference w/phone number for each. (Limit to no more than 10 pages)
  - a. Present a track record of original-to-actual construction budget cost for experiences provided
  - b. Present a track record of originally planned-to-actual occupancy date for experiences provided
4. Provide a narrative outlining your philosophy to ensure projects are delivered: within budget, on time, of high quality and with least disruption to ongoing operations. (Limit 3 pages)
5. Provide a narrative outlining your philosophy on post-construction commissioning facilities. (Limit to 1 page).
6. Describe how your change order review and recommendation process works. (Limit to 1 page)
7. Describe how you will manage material and furniture, fixtures and equipment (FFE) purchases to ensure the project meets its objectives. (Limit to 1 page)
8. Maintaining a safe and comfortable environment for our employees, students, and visitors is paramount. Please describe your project approach during construction. Be sure to address the issues of safety and noise, as well as other issues you feel are appropriate. (Limit to no more than 5 pages)
9. Construction Management Details

## DESIGN/PRE-CONSTRUCTION PHASE

Provide a thorough review and evaluation of the building requirements.

- a. Using design phase development plans and specifications from the architect
  - i. Provided and conceptual and detailed design phase cost estimates,
  - ii. Milestone schedule,
  - iii. Ongoing constructability analysis of all major building systems and components.
  
- b. Following is a bullet point summary of tasks to be performed in this phase:
  - i. Project planning and goal statements with the entire team of the District and District's Architect.
  - ii. Overall budget tracking and design-phase cost estimating.
  - iii. Project milestone schedule and phasing plan, including a cash flow analysis for use by financial advisor.
  - iv. Meet with District's staff to ensure strong communication of events planned.
  - v. Attend District's and District's Architect's team design meetings as needed.
  - vi. Plan review for constructability and phasing.
  - vii. MEP review (In-house engineer review of mechanical and electrical systems).
  - viii. Quality review (In-house architect constructability review).
  - ix. Provide Board and Administration with updates and status reports in this critical pre-construction phase.

## BID & AWARD PHASE

As Construction Manager for the School District of West Salem, the Construction Manager will assist in:

- a. Competitively bidding all categories of the work.
- b. Review bids with the District and provide the District with a guaranteed maximum price (GMP) after selection and verification of bid leveling in conjunction with District's architect,
- c. Will work closely with the city, state and other appropriate agencies to ensure a clear and precise set of documents is provided for regulatory review and approvals.
- d. Will work to generate local and regional bidder interest and ensure that plan sets are distributed to the bidding contractors.
- e. The on-site superintendent will also conduct a thorough review of the plans and documents, and post any addendums as applicable to finalize guaranteed maximum price (GMP).
- f. The following is a summary of work to be performed in this bidding and procurement phase:



- i. Develop front end bidding requirements that meet District and project needs.
- ii. Develop clear scope descriptions for the multiple prime bidders.
- iii. Work with the District and District's Architect to identify qualified local and regional trade contractors, vendors and suppliers and bundle work scopes to make project work available to these entities.
- iv. Identify "long-lead" bid items and work scopes to ensure early bidding/procurement as needed.
- v. Assist District and District's Architect in creating and publishing the required "Advertisements for Bid".
- vi. Create a construction schedule to include in documents for bidders
- vii. Conduct pre-bid walkthroughs of the existing building and site for bidders to understand existing conditions.
- viii. Assist in permitting process and procurement of initial building permits.
- ix. Post any addendums as needed prior to Guaranteed Maximum Price (GMP).
- x. Ongoing plan review, including specifications and general requirements.
- xi. Organize and manage the bid day operations.
- xii. Review bids with District and District's Architect, bid bonds, required affidavits, and ensure completed and responsiveness of bid forms/proposals.
- xiii. Meet with potential low bidders to follow-up and vet completeness and understanding of project expectations.
- xiv. Assist in District's Board meetings or staff project updates as needed.
- xv. Collect front-end requirements prior to contractors starting work (insurances, bonds, submittals, etc.).
- xvi. Create shop drawing submittal logs and distribute.
- xvii. Begin shop drawing review process - especially for critical long-lead items.
- xviii. Conduct a construction kick-off construction meeting to layout ground rules and procedures and include District and District's Architect.

## **CONSTRUCTION PHASE CM SERVICES**

1. Assist in monitoring owner purchase orders (outside the contractor work) and construction dollars spent each month to verify that the payment applications and invoices submitted are appropriate for the work completed to date.
2. Work closely with the District, District's architect and the trade contractors to promote strong team communication throughout the entire construction process.
3. The following is a bullet point review of our Construction Manager activities and services during the construction phase:
  - a. Full time, on-site project supervision.
  - b. Project management and project assistant.
  - c. Conduct regular jobsite progress meetings throughout the construction duration with District, District's Architect and Contractors.



- d. Conduct regular contractor foreman meetings to cover jobsite safety, schedule, and other topics.
- e. Publish Three-week look ahead schedules for District's review.
- f. Create and distribute meeting minutes on a bi-weekly basis.
- g. Track submittals and update logs.
- h. Track and update contract information, as required due to changes.
- i. Monitor and update overall project costs v. budget each month to District and District's Architect.
- j. Enforce overall quality of work-in-place to meet requirements and standards.
- k. Monitor and update schedules and overall schedule.
- l. Assist in owner-direct purchases for the project (including furnishings and equipment).
- m. Ongoing quality review with District and District's architect and record.
- n. Progress photos and written updates for District, District's Architect and communicating to the Community/Public.
- o. Assist with procurement of commissioning agent services for project, including developing RFP for proposals.
- p. Maintain daily logs of onsite project information.
- q. Ongoing staff and administration updates.
- r. Enforce site staging and access that coordinates with District needs.
- s. Monitor and enforce ongoing site safety and security throughout the project duration.

## **PROJECT CLOSE-OUT/COMMISSIONING PHASE**

1. Establish expectations and develop an early start on the close-out process and deliverables to the District.
  - a. As-built drawings
    - i. Hard Copies
    - ii. PDF Electronic Copies
    - iii. Application Files i.e. DWG/DXF files.
  - b. Operations and Maintenance manuals, and other close out documents will be provided promptly and in an organized manner.
    - i. Hard Copies
    - ii. PDF Electronic Copies
    - iii. Application Files if they exist. i.e. Word, PowerPoint, Excel files.
  - c. Close-out and TRAINING activities will be scheduled and attended by the appropriate parties.
    - Recording and Documenting for each training.
    - Deliver recorded Training files in a usable file format. i.e. AVI, Mpeg, etc.
  - d. All equipment/asset information including warranties, estimated life, costs, sub-components/child assets with parent asset ID associated etc. in a spreadsheet form (i.e. Excel, CSV) to allow district to import into Management System.



- District will supply Excel spreadsheet with the fields required to be filled in for each equipment/asset, sub-components of assets, etc.
- e. All equipment/asset information requiring Preventative Maintenance and/or Inspection schedules in an electronic spreadsheet format (i.e. Excel, CSV).
  - District will supply Excel spreadsheet with the fields required to be filled out for Preventative Maintenance and/or Inspection for each equipment/asset, sub-components of assets, etc.
- 2. The following is a list of close-out requirements which the Construction Manager will organize and facilitate and provide as required in hardcopy, electronic copy and application formatted files as identified above:
  - a. Collect as-built drawings
  - b. Monitor punch-list completion
  - c. Pursue agency requirements to receive Certificate of Occupancy for the space
  - d. Collect Consent of Sureties
  - e. Collect warranty information
  - f. Meet with appropriate staff and administrators upon project completion
  - g. Organize and enforce substantial completion requirements
  - h. Monitor and recommend release of contractors' retainage only when close-out documents are completed
  - i. Coordinate with Test and Balancing contractor to finalize tests and reports
  - j. Organize close-out documents for turning over to owner

## **FEE/COMPENSATION BREAKDOWN**

1. Similar scenario of breakdown and basis of Basic CM Fee and other compensation, per phase, per current understanding of proposed referendum project.
2. Construction Manager will sit down with the District and the District's architect to further define and establish fees and compensations, and execute the AIA A133 Contract Agreement, with supporting exhibits.
  - a. *Design Phase Services*
    - Compensation for Construction Management services throughout this phase that needs to be included in the Construction Management fee.
  - b. *Construction Phase Site Services*
    - i. Construction Manager will develop a lump sum, Guaranteed Maximum Price (GMP) for these construction phase site services costs after and in conjunction with the District and District's Architect, as the project scope and schedule becomes fully defined.
    - ii. Site supervision, management, and site support costs will not result in an added amount to the construction cost of the project.
  - c. *Close-Out Phase*
    - Include overall CM fee as percentage which includes the Guaranteed Maximum Price (GMP) and AIA A133 Contract Agreement with the District.



1. This fee includes pre-construction/design phase services, as well as administrative closeout services.
  2. Includes home office support resources.
  3. Includes Compensation for Overhead & Profit
3. This letter is meant to serve as a commitment of understanding on behalf of Construction Manager and the School District of West Salem.

**District’s Selection of Construction Manager**

Enter below your full and complete information and fee. The fee listed on this form is subject to subsequent negotiations, but will be used in the comparative evaluation of all RFP’s submitted to make selection on those to be interviewed and ultimately selected as the Construction Manager.

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State & Zip: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

E-Mail: \_\_\_\_\_

FEIN Number: \_\_\_\_\_ DUNS #: \_\_\_\_\_

Bid \$: \_\_\_\_\_

**Proposals are due by 3:00 p.m. on December 30, 2024**

**Proposals should be emailed to:**

**Superintendent Ryan G. Rieber**  
[rieber.ryan@wsalem.k12.wi.us](mailto:rieber.ryan@wsalem.k12.wi.us)  
**School District of West Salem**  
**405 East Hamlin Street**  
**West Salem, WI 54669**

For follow-up questions, please contact Superintendent Ryan Rieber at 608-786-5303 or via email at [rieber.ryan@wsalem.k12.wi.us](mailto:rieber.ryan@wsalem.k12.wi.us).