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**UNDERSTANDING OF THE PROJECT:** This section of the SOQ should demonstrate the Respondent's understanding of the Project needs, the services required, and any local issues or concerns.

The development of a project such as the Courthouse Project is an uncommon occurrence for the County. Accordingly, the County does not employ fulltime professionals or staff necessary to provide owner's program management necessary for a development of this scale. The overall objective is to provide Program Manager ("PM") services encompassing planning support, community outreach, design management, construction project management, field inspection services, warranty management and asset preservation, project controls, administration and compliance monitoring of funds or other related services for the Project. It is imperative that the implementation of the Project be completed on schedule and within budget. The selected firm and its key personnel must have PM experience in the management and execution of similar major, public, capital improvement that involve construction. It is not necessary that the experience be courthouse specific, but such experience is relevant.

This description should be concise, candid and limited to 3 pages in length.

**FIRM QUALIFICATIONS:** This section of the SOQ should address how the selected PM will act as County's advocate and represent the County in managing the Project development process.

The successful Respondent must demonstrate a highly qualified ability to accomplish the objectives of this RFQ. Additionally, the successful Respondent must demonstrate a deep understanding of strategies to achieve a high-performing building development process and physical building that shall be accomplished within the Project budget.

The PM must be experienced in and capable of providing the following services generally described below and in the Scope of Services. The County may in its discretion choose not to procure some portions the following or Scope of Services and may request other services not listed below.

**Summary of Scope of Required Services:**

- a. Management of Design Phase: The PM shall be responsible for providing project management of the remaining portions of the design phase and support the development of scopes of construction work to be included in design review and construction packages.
- b. Management of Overall Task Sequencing: The PM shall be responsible for developing of a Gantt chart or similar device with sufficient detail to establish the overall sequence of Project elements and timing for completion of each element and the overall Project
- c. Management of Construction Phase: The PM shall be responsible for providing project management of the construction phase.

- d. Field Inspection Services: The PM shall be responsible for providing field inspection services as necessary to ensure compliance to schedule, budget, quality and other CMAR contractual requirements.
- e. Project Controls: The PM shall be responsible for coordinating with the appropriate persons to manage the processing of schedules, design deliverables tracking and distribution, invoices, contracts, change orders, amendments and other controls to develop systems that result in the delivery of work and services on time and in budget.
- f. Project Close Out: The PM shall be responsible for assisting in the preparation of documentation for closeout. Close-out includes the set-up of preventive maintenance programs, management of warranties and asset preservation for each project executed. The PM shall be responsible for all necessary financial reports.
- g. Temporary Facilities: The PM may be responsible for management of temporary locations as needed for swing space.

Phases of Activities

The PM is expected to provide PM services during the following phases of the Project:

- a. Design Development Phase
- b. Construction Document Phase
- c. GMP and Procurement Phase
- d. Construction Phase
- e. Commissioning and Activation Phase
- f. Contract Closeout Phase

Additionally, this section should include a description of the firm's project personnel and their most recent (and varied) projects. For each project, a client contact name and phone number should be included for reference purposes. Additionally, the names of the personnel proposed for this project who participated in the listed projects should be provided. This project list is limited to 5 pages.

**PERSONNEL AND STAFFING:** The SOQ should provide an organizational chart for the proposed Project personnel and a summary paragraph of the Project services to be performed by each proposed staff member. Biographic summaries that highlight the experience relevant to the specific Project responsibilities should be provided for all proposed personnel. A statement should also be included about such personnel's education, training and experience related to the services to be provided. There is a one (1) page limitation for each biographic summary provided.

**ADDITIONAL INFORMATION REQUIRED**

Additionally, the SOQ should include, but not limited to the following information:

- a. Firm name, address, phone number and person to contact regarding the SOQ;
- b. Qualifications and recent experience of the firm and key personnel relative to the performance of similar services, especially those for public governmental entities. This should also include the following information:
  - Evidence of achievements acquired by PM staff;
  - Representative PM experience relevant to the Project;
  - List of projects within the last five years for projects similar to Project;

- List of in-State references including the name, address and phone number of the person most closely associated with the firm's prior project performance;
- Statement of the ability to commence services immediately after successfully negotiating a contract for services;
- Familiarity with and experience in the geographical area of the Project; and
- Statement regarding achievement of MWBE goals.

**PARTICIPATING FIRMS ARE NOT TO PROVIDE A FEE PROPOSAL**

The fee will be negotiated in accordance with the Professional Services. Procurement Act, Tex. Govt. Code Arm. 2254.001, et seq. Once selected, proposer is to provide a fee proposal based on the scope of work.

**PROJECT DESCRIPTION AND SCOPE OF SERVICES**

**1. GENERAL PROJECT DESCRIPTION**

The County of Hidalgo, Texas ("County") is developing a replacement courthouse ("Project"). It is anticipated that the Project building will include approximately 500,000 square feet, 24 courtrooms, District and County Clerks' offices, other offices and room for expansion.

A proposal was submitted in response to an RFQ from a design team comprised of EROS/HDR/Half and Balfour Beatty submitted a schematic design. A copy is attached for information about the Project parameters, Exhibit \_\_\_\_ . Subsequently, a team led by HOK prepared a peer review and suggested an alternative design, which is also attached, Exhibit \_\_\_\_ . These documents provide the basic characteristics of the facility being developed, which is now at the Schematic Design Phase level. The Architect of record has not been selected.

**2. SCOPE OF SERVICES:**

This RFQ is intended to obtain PM services in accordance with all applicable law pertaining to the procurement of professional services and the requirements of this RFQ. The Respondent should recommend any tasks and services it thinks advisable in addition to those described below and any services it considers inefficient and unnecessary for this Project.

**2.1. Responsibilities and Deliverables**

The PM's Responsibilities and Deliverables for the Project may include, but are not limited to, the following.

**2.1.1. Responsibilities:**

- a. Provide personnel and managers to which the County has no reasonable objection who have the education, training and experience to carry out the scope of services required for a successful project.
- b. Develop a Program Management Plan with County input that defines Project requirements and goals. This document will provide guidelines for the Project stakeholders' activities and provide, without limitation, strategies for accomplishing such requirements and goals.
- c. Develop media and PR documents, websites and events under the direction of Commissioners Court's authorized representative.

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- d. Develop project controls for managing the development of the Project on behalf of the County, which shall include, without limitation, controls for construction and other documents, financial matters, quality and inspections, administration of contracts, compliance monitoring and close-out.
- e. Develop a master schedule that is continuously updated and coordinated with professionals', CMARs' and subcontractors' schedules, submittal schedules, inspection schedules, permit schedules, and occupancy schedules. Provide recommendations for schedule modifications to complete the Project on time and factors to consider in making any modifications. Recommend recovery actions and solutions on a timely basis to ensure appropriate corrective decisions are made.
- f. Assist with Project budget development. Develop master budgeting tools and controls. Obtain and monitor design-to-budget estimates for each design review issuance and bid package. Provide recommendations for modifications to complete the Project within budget and factors to consider in making any modifications. Recommend recovery actions and solutions on a timely basis to ensure appropriate corrective decisions are made.
- g. Monitor professional services and administer their contracts with the County to ensure delivery for periodic reviews within the established schedule and cost parameters and in compliance with quality assurance requirements. . Consult and advise on construction cost versus long term maintenance cost choices as the design develops. Provide timely professional service communications. Develop and implement appropriate recovery strategies when management objectives are at risk
- h. Develop and implement strategies to implement and maximize the value of Construction Manager at Risk ("CMAR") Project delivery, possibly including fast-track delivery techniques and multiple construction document packages, which would enhance the building program goals of high quality buildings delivered on time and within budget.
- i. Assist the County in providing regular reports to Commissioners Court, County officials and personnel, the City Council of Edinburg and other stakeholders and in administering and facilitating agreements between the County, the City Council of Edinburg and other stakeholders.
- j. Assist the County as required in program financial or programmatic audits.
- k. Evaluate and review any design errors and omissions that breach the applicable professional standard of care, rendering professional opinions to County and assisting County in recovery efforts if necessary.
- l. Monitor during design and construction compliance with all federal, state and local applicable environmental requirements, standards, building and accessibility codes, ordinances, flood and drainage requirements and regulatory requirements.
- m. Manage the submittal and obtaining all required documents for approval by Federal, State, County, City, and flood district and other governmental agencies having jurisdiction over the Project.
- n. Provide document quality assurance/quality control reviews.
- o. Verify that all addenda have been incorporated into the final plan set prior to start of construction.
- p. Organize and conduct a pre-construction conference. The agenda will cover, without limitation, site organization, communications, coordination, correspondence, submittals, meetings, requisitions, change orders and schedule.

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The conference will include all project stakeholders including the County representatives, the architect and consultants and the CMAR.

- q. Monitor and assist in construction document dissemination.
- r. Support and assist CMAR in the construction program procurement plan and schedule.
- s. Provide a full-time site representative for inspections and other activities.
- t. Provide project management of construction activities. Conduct and lead regular jobsite meetings, oversee quality assurance testing and inspection programs and monitor contractor and subcontractor work for deficiencies. Maintain copies of all contract documents, RFI's, ASI's, submittals, change orders, pay applications, and other documentation. Monitor contractor and subcontractor safety programs. Monitor communication, processing and documentation of same.
- u. Report potential budget and schedule variances and monitor implementation of recovery plans to achieve on-time Project completion.
- v. Monitor and inform the County of Project cash flow.
- w. Ensure that all contract drawings, terms and conditions are adhered to during the construction phase.
- x. Validate accuracy and supporting documentation of pay applications of architect and other consultants such as testing firms.
- y. Monitor CMAR work quality and compliance with the terms of the contract and the quality level expected for the Project in a manner coordinated with on-site activities of the design professionals. Quality Control encompasses all phases of the work, such as approval of submittals, procurement, storage of materials and equipment, coordination of subcontractor's activities, and the inspections and tests required to be sure that specified materials are used and installation is acceptable to produce the required end product. Work with architects to assist in monitoring the quality of the work being performed and ensure the CMAR maintains the quality expected as well provide any corrective action required for any identified deficiencies. Monitor the activities of all testing inspection consultants, inclusive of testing laboratories, factory testing and on-site testing. Develop monitoring and tracking procedures to be followed by all testing inspection consultants. **The PM shall not interfere with or take on any control over any construction means, methods, sequences, techniques or safety programs of CMAR or its subcontractors or suppliers.**
- z. Participate in and make recommendations on the issuance of the certificates of substantial completion and conduct final inspections with County personnel.
- aa. Participate in and make recommendations on the issuance of the certificate of final completion.
- bb. Ensure that the efforts of County departments are coordinated with the on-site CMAR activities.
- cc. Manage and facilitate the implementation of all commissioning processes and guidelines throughout the Project duration.
- dd. Assist in coordinating furnishings, fixtures and equipment installation as requested by the County and Project move-in.
- ee. Administer post construction close-out, start-up, and transition to operation including ensuring receipt of all operations and maintenance manuals, warranties and as-built drawings.
- ff. Expedite final Project close out and approval for final payment to CMAR and assist in all post construction dispute resolution as necessary.

2.1.2. Deliverables (including, without limitation)

- a. Organizational chart for managers and key County and PM staff of the Project with biographical information of all PM personnel and managers.
- b. Program Management Plan.
- c. Task sequencing plan.
- d. Project Controls.
- e. Master Schedule.
- f. Master budgeting tool and controls.
- g. Cost estimating documents and controls.
- h. All reports, charts and controls generated in performance of Project Responsibilities.
- i. Full-time site representative.
- j. Regular reports on Project's progress including, but not limited to, Project cost, schedule, cash flow projections, change orders and work status.
- k. Project controls, performance and management metrics and related reports to assure all activities proceed on schedule, within scope, within budget and at quality levels agreed to.
- l. Within 30 days of contract award, submit a contractor outreach and public communication plan that encourages participation of MWBE involvement throughout the services assigned to the PM and periodic reports on reaching goals.
- m. Check-list for each design submittal to ensure that the County has considered all applicable issues and the most current information is delivered to CMAR.
- n. Document issuance controls.
- o. Daily project field reports of all the details of the work including, without limitation, weather, manpower, CMAR equipment, material and equipment deliveries, general description of work being performed, presence of design professional perform contract administration duties, assessments of quality and workmanship and location Issues and areas of concern or critical to job progress in both electronic and hard copy forms.
- p. Project progress photos.
- q. Reports on completion of CMAR's punch-lists and substantial completion inspections.
- r. Recommendations, reports and documentation on any change orders and claims by the CMAR or its subcontractors
- s. Delivery of all as-built drawings, warranties and Project service documentation to County for record keeping purposes.

3. CMAR PAY APPLICATION PROCESSING

The PM will develop and implement a two-step process for the review and approval of monthly CMAR payment applications and will process the final application for payment.

- 3.1. During the final week of each month, PM will conduct a payment application review meeting to include architect and CMAR for the purpose of reviewing a draft of the monthly payment application. Each line item will be reviewed and either accepted or noted for changes.

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- 3.2. A second meeting will be held with the contractor to review the corrected payment application. If acceptable, PM will recommend approval to the architect and County. If changes need to occur, PM will work with the CMAR to get all changes made as soon as possible for acceptance.
- 3.3. PM, with input from architect, will review the final payment request upon successful completion of all closeout items, including final punch list, all permits, substantial completion certificate(s), and resolution of any open claims. Once PM, together with the architect, is satisfied that all contractual obligations have been met will recommend approval and submit to the County the final pay request.