



Request for Proposals

To Provide

Consulting Services to the Fallbrook Public Utility District

For Construction Management Services for the **Santa Margarita Conjunctive Use Project**

Job #4077

May 16th, 2018

Fallbrook Public Utility District

990 E. Mission Road

P.O. Box 2290

Fallbrook, CA 92088

(760) 728-1125

I. Introduction

On June 5, 1922, Fallbrook Public Utility District (FPUD) was incorporated to serve water from local area wells along the San Luis Rey River. Since that time, FPUD has continued to grow, and today the District provides imported water and sewer service to 35,000 residents living on 28,000 acres. About 40 percent of the water is used by agriculture. The District also produces about one and one-half million gallons of recycled water daily that is used to irrigate nurseries, playing fields, landscaped freeway medians, home owners associations and common areas.

The Santa Margarita River flows from Riverside County, California through Marine Corps Base Camp Pendleton (MCBCP) in northern San Diego County terminating at the Pacific Ocean. Water rights to the river have been disputed between FPUD and MCBCP for several decades. The settlement of this dispute requires the construction of facilities by both parties known as the Santa Margarita Conjunctive Use Project (SMCUP). MCBCP will divert river flows allowing infiltration of the water into the aquifers on base as well as provide wells and pumps to deliver groundwater to FPUD's boundary. In turn, FPUD will build facilities to treat and deliver the water to the District's customers.

II. Scope of Required Services

The proposed scope of services for the Project includes:

Pre-Award and Pre-Construction Services

Provide an evaluation and recommendation of the apparent low bidder. Prepare a preconstruction agenda and attend the pre-bid meeting. Perform a thorough review of project design documents to become familiar with the project. Assist FPUD in answering construction (non-design) related questions received during the bid period.

Mobilization

Schedule, notify appropriate parties, and conduct an initial pre-construction meeting with the Contractor. Prepare and distribute preconstruction minutes to attendees and other parties. The pre-construction meeting shall cover, as a minimum, the overall project objectives, responsibilities of key personnel and agencies, schedules, schedule of values (bid breakdown), procedures for handling submittals, correspondence, utility relocations, local agency permit requirements, requests for clarification, progress payments, prevailing wage requirements, change orders, safety issues, emergency response requirements, and other pertinent topics.

Meetings

Schedule and conduct construction progress meetings with the Contractor, Design Engineer, and FPUD. Provide meeting agendas and discuss the schedule, near-term activities, clarifications and problems which need resolution, coordination with other Contractors, status of change orders, safety issues, OSHA visits and citations, and other topics. Identify action items and assign responsibility for the action and date action is to be completed. Prepare minutes of the meetings and include identified action items. Review the meeting minutes with the Contractor and obtain the Contractor's concurrence with the content. Distribute the minutes to the attendees within three calendar days of the meeting. Attend other construction-related meetings as requested by FPUD.

Shop Drawing and Submittal Reviews

Coordinate review of routine submittals received from the Contractor with the Design Engineer for conformance with drawings and specifications. Check each submittal against the Contractor's schedule for potential impacts. Coordinate required reviews of submittals with the FPUD Project Manager. Distribute submittals to appropriate reviewers with dated transmittal letters. Log, route, track, and monitor shop drawings, calculations, data samples, submittals, and manuals from the Contractor. Update the submittal log as items are received and responses given. Prepare weekly exception reports identifying outstanding submittals and reviews. Review with the Contractor the status of submittals at the monthly construction meeting using the submittal log and the master submittal list.

Plan and Specification Interpretation and Control

Coordinate the Request for Information (RFI) log. Review and respond to Contractor RFI. Make every effort to review and provide appropriate response to RFI and coordinate as needed with Design Engineer prior to involving the FPUD Project Manager. Distribute RFI to appropriate staff and coordinate timely response. Review answers and prepare formal response to Contractor as needed to meet schedule requirements. Respond in writing to Contractor questions from a reasonable review of the drawings and specifications for clarification items. Record changes in the record specifications and plans. Review and respond to requests for design revisions by the Contractor. Responses to requests for design revisions require prior written approval from the FPUD Project Manager. Revisions in design may require extensive research, evaluation, and recommendation from the FPUD Project Manager. Provide written recommendations, as required. Initiate and review field orders when a change in the work is needed to maintain the design intent. Issue the field order to the Contractor and monitor the work for compliance. Track the issued field orders in a log. Record the changes in the record specifications and plans. If required, follow-up with a change order received from FPUD Purchasing after mutual agreement with Contractor on pricing and conditions. Coordinate evaluation of "or-equal" or product substitution requests with the FPUD Project Manager, Design Engineer, vendors, manufacturers, and others. Prepare evaluation and recommendation for "or-equal" or product substitution requests. Update continually the plans and specifications as the work progresses. Incorporate

modifications and changes from all sources, such as submittals, RFI, field orders, extra work, and change orders. Compare the record drawings and specifications with the Contractor record drawings and specifications monthly.

Baseline Schedule and Schedule Updates

Work with the Contractor to meet the milestones on the baseline schedule, developed by the Contractor. Updates to the schedule shall be included in the monthly progress report.

Progress Report

Prepare monthly progress reports for FPUD staff. Progress reports shall include:

- A summary of the main accomplishments over the previous month
- Highlight any unresolved issues discussed during the monthly meetings
- A summary of current construction activities
- Photographs of representative project activities
- A summary of progress payments, change orders, disputes, submittals, RFIs and Notices of Noncompliance
- Identification of key problems, action items and issues and include recommendation for solutions
- Overall Contractor's conformance to the contract schedule and quality requirements

Progress Payments

Conduct monthly progress payment meetings with the Contractor and coordinate and update the record drawings at this meeting. The result of the meetings shall be the progress payment estimate and the baseline schedule. Coordinate the review of the Contractor's monthly progress payment request with FPUD staff and prepare a recommendation stating the proper amount of payment.

Change Order Management

Prepare, log, and monitor Contractor or FPUD initiated changes to the work, extra work, and change orders. Request cost proposals from the Contractor for extra work and assist with negotiation of final cost. Prepare written justification and cost estimates for each extra work or change item. Justification shall include a statement of the extra work or change; background leading to issue; resolution alternatives and resolution recommendation for action by FPUD.

Claims Management

Identify, prepare, log, and monitor Contractor potential claims. Report verbal and written claims immediately to FPUD. Coordinate claims with FPUD's Project Manager. Prepare written explanation of each claim with full background of issues, proposed resolution alternatives, and resolution recommendation for action. Assist and support FPUD in resolving claims and

disputes, including written responses to Contractor and private parties, giving depositions, assisting with dispute resolution, arbitration and litigation, serving as an expert witness, investigating claims for damages by private sources, design services for replacement of damaged work, and services made necessary by Contractor default. Negotiate claims to an agreed conclusion. Investigate claims for damages by private parties and respond in writing within two calendar days of receipt of the claim. Coordinate the written response with FPUD's Project Manager.

Quality Assurance

Provide inspections as necessary to ensure that materials and workmanship are in compliance with the contract documents. Coordinate delivery, inspect for defects or missing parts, and oversee recording the receipt and storage of equipment. Inspect construction activities, which are identified in the contract documents to be performed at night, weekends, and/or holidays. Prepare reports of the construction activities including Contractor's equipment and manpower, work performed, materials used, site visitors, delays in work and reasons for the delays, and deficiencies. Prepare reports of deviations and non-conformance to specifications and provide responses in accordance with the specification requirements. Advise the FPUD Project Manager, Design Engineer, and the Contractor of deviations in the work and document any deviations. Record deviations that are not corrected and immediately deliver a Notice of Non-Compliance to the Contractor. Perform necessary follow-up to resolve Notices of Non-Compliance. Include unresolved Notices of Non-Compliance on substantial completion punch lists. Track all deviations to specifications and drawings for use in preparing as-built plans. Immediately notify the FPUD Project Manager if any safety violations are observed. Coordinate necessary shutdowns with FPUD staff to complete connections to existing facilities.

Closeout Services

Prepare detailed project punch lists at substantial completion of the project. Upon correction of deficiencies, schedule, coordinate, and conduct a final walk-through with FPUD staff prior to the acceptance of work. Provide certification of Contractor's compliance on work items specifically requested by FPUD. Verify that work, testing, cleanup, and Contractor demobilization are complete. Final project records and documents must be turned over to FPUD upon completion of the project. Deliver the Operations and Maintenance Manuals and any spare parts and equipment to FPUD upon acceptance of the completed project. Review and certify that the Contractor's project record drawings are complete and accurate. Provide the drawings to the FPUD Project Manager. Recommend final payment in the form of release of retention to the Contractor in accordance with contract requirements. Verify that the Contractor has made all payments to the subcontractors and vendors and that any stop notices or liens have been released. Obtain Unconditional Waiver of Lien as appropriate from the Contractor prior to recommending final payment.

III. Facility Location

(Multiple) Gheen Reservoir Site – 2055 E. Mission Rd, new Water Treatment Plant Site – 1425 S. Alturas Rd. Meetings are anticipated to take place at the FPUD offices in Fallbrook at 990 East Mission Road in Fallbrook CA but may also be conducted on-site.

IV. Proposal Requirements

Proposals are to include the resume of the proposed construction manager and a list of references. A cost proposal shall be included in a separate sealed envelope. The proposal shall not exceed 15 pages. Responders will be evaluated based on the information submitted in accordance with Section V. Proposals submitted in response to this RFP shall include:

1. Resume and Experience of CM
2. References
 - a. Provide three references including contact information for similar projects conducted by CM.
3. Rate Schedule and Cost Proposal
 - a. Include an hourly rate schedule including all service fees and anticipated travel costs.
 - b. Identify proposed multiplier for the individual proposed for the project.
 - c. Cost proposal shall identify the effort anticipated to complete the project. Identify assumptions associated with the cost proposal. Include in a separate sealed envelope.

V. Evaluation Criteria

FPUD's consultant evaluation and selection process is based on Qualifications Based Selection (QBS) for professional services. An evaluation committee appointed by the Project Manager will review the proposals. The criteria and weight for evaluating the proposals submitted will be as follows:

1. 25% - Reputation of the proposed Construction Manager, including a verification of data and references.
2. 35% - Understanding of project objectives and scope of work as evidenced in the written narratives and oral interview.
3. 30% - Experience of Construction Manager with projects of similar nature.
4. 10% - Staffing capabilities demonstrating that the present workload of the firm and the availability of staff for the project will remain sufficient throughout the duration of the contract.

VI. Schedule for Selection and Award

The District anticipates that the process for selection of firm and awarding of the contract will be according to the following tentative schedule:

1. Issue RFP.....5/16/18
2. Pre-proposal meeting.....5/29/18
3. Proposal due date.....6/14/18
4. Interview.....6/20/18
5. FPUD Board of Directors approval.....6/25/18
6. Final selection and notification6/28/18
7. Design Complete.....TBD
8. Start Construction.....TBD
9. Construction Complete.....TBD

The pre-proposal meeting is mandatory and will be held at FPUD’s main offices, located at 990 E. Mission Road, Fallbrook, CA 92028 on 5/29/18 at 10am PST.

VII. Submittal Requirements

1. One (1) executed original, clearly marked on the cover and three (3) additional copies of the proposal shall be submitted. An individual authorized to execute legal documents on behalf of the project team shall sign the proposal.
2. One (1) sealed cost proposal.
3. Interviews will be with only the proposed CM for the project.
4. This RFP shall be received no later than 4:00 PM local time, 6/14/18, at the District’s Administrative offices:

Fallbrook Public Utility District
Attn: Kevin Collins, Purchasing/Warehouse Supervisor
990 East Mission Road
P.O. Box 2290
Fallbrook, CA 92088-2290

Failure to comply with the requirements of this RFP may result in disqualification.

All questions regarding this RFP shall be directed to Kevin Collins, Purchasing/Warehouse Supervisor, at kcollins@fpud.com or (702) 688-9171.