LEBANON R-III SCHOOL DISTRICT Lebanon, Missouri

REQUEST FOR QUALIFICATIONS for CONSTRUCTION MANAGER AT-RISK SERVICES

for

ADDITIONS & RENOVATIONS TO MAPLECREST ELEMENTARY, BOSWELL ELEMENTARY AND THE HIGH SCHOOL

Qualifications Statement shall be labeled:

"QUALIFICATIONS - CONSTRUCTION MANAGER AT-RISK"

and addressed to:

Attn: Dr. David Schmitz, Superintendent Lebanon R-III School District 224 Commercial Street Lebanon, MO 65536

Qualifications Statements must be received by: 2:30 p.m. Monday, April 1, 2024

Lebanon Schools – Contact Person

Mr. Adam Dameron, Executive Director of Business & Operations

adameron@lebanon.k12.mo.us

417-657-6007

Questions should be directed to: Sapp Design Architects

417.877.9600

Kristi Beattie, Project Manager (<u>beattie@sdaarchitects.com</u>)
Or Stephen Telscher, Senior Project Manager (<u>Telscher@sdaarchitects.com</u>)

CERTIFICATION FORM

REQUEST FOR QUALIFICATIONS CONSTRUCTION MANAGER AT-RISK

Lebanon Schools will accept qualifications for a Construction Manager At-Risk in accordance with RSMO § 67.5050 and as described in the attached request. Qualified organizations ("Respondent") are invited to submit three (3) hard copies and one (1) digital copy of a formal qualifications statement as described herein.

Lebanon Schools reserves the right to reject any and all Qualification Statements, to waive technicalities, and to select the respondent deemed most advantageous to Lebanon Schools.

The undersigned certifies that he/she has the authority to bind the company in an agreement to supply the services in accordance with all terms and conditions specified herein. Please type or print the information below. **Respondent is required to complete, sign, and return this form with the Qualification Statement.**

Company Name		Authorized Person (Print)
Address		Signature	
City/State/Zip		Title	
Telephone Number	Fax Number	Date	Tax ID Number
E-mail		Entity Type (Corporation, LLC, Sole Proprietor,	
		Partnership)	

PART 1: INTRODUCTION AND PROCESS

1. PURPOSE

The Lebanon R-III School District ("District" or "Lebanon Schools") is requesting qualifications from firms to provide a full range of services as Construction Manager At-Risk ("CMR") during the planning, design, renovation, and new construction of various projects for the District as generally described below. Lebanon Schools will retain Sapp Design Architects ("Architect") to provide all design services, and the CMR will be required to work with Lebanon Schools and the Architect during the planning phase, construction document preparation, and the construction process.

STEP ONE: REQUEST FOR QUALIFICATIONS

This Request for Qualifications ("RFQ") is the first step in a two-step competitive process by which Lebanon Schools will engage a CMR firm to provide construction management at-risk services. Step one will consist of a request for qualifications, review of qualifications, and selection of a short list of firms who will receive a Request for Proposals ("RFP") and invitation to interview. **Respondents are not to include fees, costs, or price information in response to the RFQ.** Responses to the Request for Qualifications will be due by **2:30 p.m., Monday, April 1, 2024** at the listed address for Lebanon Schools.

STEP TWO: REQUEST FOR PROPOSALS

Step two will consist of a short list of firms being asked to prepare and submit a services/cost Proposal in response to Lebanon Schools Request for Proposals "RFP" and Lebanon Schools will interview firms before selecting a CMR. Interviews will take place on **Wednesday, March 13, 2024** at the Lebanon Schools address. Times to be determined.

Respondents selected by Lebanon Schools to provide the Request for Proposal will be notified on Friday, April 5, 2024 and provided with a copy of the RFP. Responses to the RFP must be submitted at the time of the CMR's scheduled interview time. Interviews will be held on Friday, April 12, 2024. Specific interview times are to be determined.

Ownership of all data, materials, and documentation originated and prepared for Lebanon Schools pursuant to the RFQ shall belong exclusively to Lebanon Schools and will be part of the public record. Names and addresses of all firms submitting Qualification Statements will be publicly read aloud by the Superintendent.

Lebanon Schools intends to enter into an AIA Document A133-2019, Standard Form of Agreement Between Owner and Construction Manager as Constructor where the basis of payment is the Cost of the Work Plus a Fee with a Guaranteed Maximum Price, as amended by the Supplementary Conditions attached to this RFQ. The General Conditions will be AIA Document A201-2017, General Conditions of the Contract for Construction, and Supplementary General Conditions as provided by Lebanon Schools. Terms of this Contract may be negotiated with the presumptive CMR following the initial CMR selection at the sole discretion of the District. All contractual agreements shall be subject to, governed by, and construed according to the laws of this State of Missouri. Documentation of compliance will be required prior to contracting with Lebanon Schools.

Lebanon Schools will have discretion to disqualify any firm that, in Lebanon Schools' Board of Education's opinion, lacks the qualifications required to perform the work/services to be provided by the CMR. The score on fees shall not account for more than 60% of the total possible score in this qualification-based selection process, with qualifications (based on the RFQ response + CMR Interview) accounting for a minimum of 40% of the total scoring.

The selection committee will select the CMR providing the best value based on the proposal criteria. The Superintendent or his designee will proceed to negotiate with and attempt to enter into a contract with the CMR/firm receiving the best total score to serve as the Construction Manager at-Risk for the project. Should the District be unable to negotiate a satisfactory contract with the firm scoring the best total score, negotiations with that firm will be terminated, and the District will undertake negotiations with the firm with the next best total score. Lebanon Schools reserves the right to reject any or all responses, to waive any minor informality or irregularity in any response, and to select the response deemed most advantageous to Lebanon Schools.

2. PROJECT DESCRIPTION

The selected CMR/firm shall provide Construction Manager At-Risk services related to pre-construction and construction services for the Renovations and Additions to: Maplecrest Elementary; Boswell Elementary; and, the Lebanon High School. Funding for the scope of work will come from the District's April 2024 Bond issue.

Scope:

- Maplecrest Elementary: The construction of a New (8) Classroom Addition, approximately 10,000 sf. Also includes miscellaneous interior renovations to the existing building at the point of connection between new and existing. The project will include all necessary utility extensions, stormwater conveyance systems modifications, parking lot and drive lane modifications, and all other temporary measures to allow school operations to remain fully functional throughout the duration of new construction and renovations.
 - <u>Budget:</u> The Construction cost (including CMR fees, Overhead and General Conditions) is estimated to be approximately \$4 million dollars.
- Boswell Elementary: The construction of a New (6) Classroom Addition, approximately 7,500 sf. Also includes
 miscellaneous interior renovations to the existing building at the point of connection between new and existing.
 The project will include all necessary utility extensions, stormwater conveyance systems modifications, drive
 lane modifications, and all other temporary measures to allow school operations to remain fully functional
 throughout the duration of construction and renovations.
 - <u>Budget:</u> The Construction cost (including CMR fees, Overhead and General Conditions) is estimated to be approximately \$3.1 million dollars.
- Lebanon High School: The demolition of existing classrooms (approx. 13,700sf), demolition of existing entry, lobby and admin (approx. 4,600sf). The construction of New (20) Classroom Addition (approx. 48,000sf, new Lobby/Commons (approx.. 8,000sf), new offices addition (4,500sf) and renovation of the existing Science wing (approx. 6,000sf). Also includes miscellaneous interior renovations to the existing building at various/multiple points of connection between new and existing. The project will include all necessary utility extensions, stormwater conveyance systems modifications, parking lot and drive lane modifications, and all other temporary measures to allow school operations to remain fully functional throughout the duration of construction and renovations. Phased construction relative to existing building demolition work, new construction (multiple phases) and renovation work will be necessary to accommodate the schools on-going operations and working in coordination with the school academic calendar.
 - <u>Budget:</u> The Construction cost (including CMR fees, Overhead and General Conditions) is estimated to be approximately \$25 million dollars.

Project Schedule:

- Maplecrest Elementary and Boswell Elementary: The design and construction schedules for both of these projects will run concurrent (same timeline) to one another. Bidding (sub-bidding) phase is anticipated to begin in June 2024 and construction phase to begin in mid-late July 2024 with a duration of no more than 12-months. Occupancy of both of these Projects must be complete mid-late July 2025 with these new/renovated facilities operational for the staff return (early August) and school starting mid-August 2025.
- Lebanon High School: The Bidding (sub-bidding) phase is anticipated to begin November 2024 and construction phase to begin immediately thereafter. The construction duration is approximately 16-months with work being complete in June 2026 fully operational for the start of school in early-mid August 2026. It may be necessary to break out select portions of the Work into an early bid package (ie: selective building demolition, utility infrastructure work) so that this scope of work can started and completed during the summer of 2024 (June-July-early August). Overall Design/Engineering design will be in the DD (Design Development) phase at that time.

3. SELECTION CRITERIA AND QUALIFICATIONS

Respondent shall provide three (3) hard copies and one (1) digital copy of the Qualifications Statement. Qualifications will be evaluated on the following criteria, and responses should appear in the order listed below. Provide a maximum of 40 pages, single-sided (or 20 pages, double-sided). Pages shall be 8.5" x 11". Total number of pages allowed shall include all items listed below, including cover pages, title pages, and any/all attachments. The (4) affidavit pages are in addition to, and not counted in, the 40/20 pages limit.

- 1. Title page.
- 2. Single page executive summary of firm profile including contact information, mailing address, overview of firm history, and why your firm should be selected, signed by an officer of the company whose title is shown.
- 3. Table of Contents.
- 4. Experience: Prioritizing CMR project delivery and similar Educational facilities/projects, including projects with multiple independent sub-projects and projects that involved fully occupied and a phased approach to construction. Include project information for projects of similar size and scope. For each project listed, provide the following information:
 - a. List the project name, location, general description of the project, completion date, contract amount (GMP amount, and summary of "contingency" usage), and type of project delivery services provided (CMaR, CMA, Design-Build, General Contractor).
 - b. For at least three (3) Educational projects, submit Owner and Architect references, including phone numbers and email addresses.
 - c. List your firm's record of cost performance. (Construction cost estimate versus construction contract bid amounts as well as contract award versus final construction cost). Provide explanation of cost deviation, and contingency amounts and usage.
 - d. List your firm's record of schedule performance. (List original schedule versus final completion date). Provide explanation of schedule deviation.
- 5. Services: Describe your company's approach to services in the following areas:
 - a. Pre-Construction: Provide a summary of the firm's methodology and practices that will be utilized in managing and executing this project in the Pre-Construction phase, including cost estimating capabilities and scheduling techniques. Describe how your firm will interact with the design consultants and the Owner, including integration of an individual(s) into the design team's structure to provide input and support during all design phases. Provide a detailed list of all pre-construction services that your firm will provide. Note unique management strategies, services, and value that your firm will bring to the project. Describe the critical pre-construction issues anticipated for this project.
 - b. Describe your subcontractor qualification process. Describe how your firm will develop and solicit Supplier Diversity participation on this project.
 - c. Construction: Provide a summary of the firm's methodology and practices that will be utilized in managing and executing this project in the Construction phase. Describe your approach to performing quality assurance/quality control during construction. Describe your approach to controlling the project construction budget and schedule. Include a detailed list of all construction phase services that your firm will provide. Describe your ability and desire to self-perform work on this project. List the critical construction issues that need to be addressed for this project to be successful.
 - d. Describe your approach to achieving project close-out (commissioning, punch-list completion, and warranty work). Describe how your firm will update the Owner and the Architect of close-out phase progress and manage warranty work required typically for one year following substantial completion.
- 6. Public Owner Process: Explain extent of experience with publicly funded projects/contract construction, including work with organized labor and adherence to prevailing wage requirements. In addition, and pursuant to RSMo Sec. 292.675, acknowledge that the CMR understands that contractors shall provide a ten-hour OSHA Construction Safety Program for its on-site employees which includes a course in construction safety and health approved by OSHA, or a similar program approved by the Department of Labor and Industrial Relations which is at least as stringent as an approved OSHA program. All of contractor's and sub-contractor's on-site employees shall complete the program within sixty days of the date they begin work on the project.
- 7. Key Personnel Qualifications

- a. Provide a brief resume for each key person that will be assigned to this project. At a minimum, provide resumes for the Project Manager, Superintendent(s), and Estimator, for both the Pre-Construction and Construction phases, if different personnel will be utilized. Identify the Team Leader. Include their name and title; location; project assignment; total years of construction experience; years of experience with CMR; years of experience with your firm; education including technical training and/or degree(s), year, and discipline; active registrations and licenses, including the number and State; other qualifications and experience.
- b. Describe the specific role performed on each project listed in the resume, highlighting projects of similar size and scope where the person's role was similar to their role on work proposed by Lebanon Schools.
- c. Provide additional resumes of alternate personnel and the firm's capacity to substitute key positions in the event of unavoidable personnel changes, or that would be added to the team as the work progresses from the Elementary school projects then the Lebanon High School project.
- 8. Organization: Provide diagrams or charts describing the firm's general organization, as well as the organization of key personnel for this project, as described above, and their degree of involvement for the various phases of service through the process, including the relationship with the Owner and Architect
- 9. Safety Program: Provide a summary description of your safety program including the following information:
 - a. Sample documentation/forms.
 - b. Summary description of your safety program implementation plan, including assigned personnel and the percentage of their time that is typically allocated to a project.
 - c. Provide your safety record and worker's compensation insurance experience modification rate and incident rate for the last 3 years.
- 10. Proximity to and familiarity with the geographical area in which the project shall be located. Provide the location of your nearest office and the number of employees.
- 11. Respondent's financial strength as demonstrated through qualifying reference checks for bank, bonding agent, and financial services auditing firm. Financial Statements are not required at this time. However, the Owner reserves the right to request such information should it deem necessary, and/or to request/require such information as part of the **step two** proposal process.
 - a. Provide names and contact information for each category indicated.
- 12. Awards: Provide any notable awards and certifications.
- 13. Provide completed and signed Affidavits and Certifications (included in this RFQ).
- 14. Provide completed and signed Certification Form (included in this RFQ).

Under no circumstance should your qualifications include any proposals of fees, costs, or prices.

The Qualification Statement shall follow the Selection Criteria and Qualifications outlined above and be concise. Failure to follow instructions may nullify the response from consideration. To be considered for selection, respondents should clearly limit responses to the specific criteria in the order listed.

Statements received after the deadline date and time will not be considered. Lebanon Schools is not responsible for lateness or non-delivery by the United States Postal Service or other carrier. The time and date recorded by Lebanon Schools shall be the official time of receipt. Proposals are to be prepared at no cost to Lebanon Schools and will remain Lebanon Schools property. All costs incurred in the preparation of the response to this RFQ shall be the sole responsibility of the respondent.

Lebanon Schools will review all RFQ submittals that are submitted in accordance with the advertised terms. The information submitted will be evaluated against the following criteria:

- 1. The specialized experience and technical competence of the firm with respect to the services described herein, and with similar size and types of projects.
- 2. Demonstration of qualifications of personnel who are assigned to manage the project.
- 3. The past record of performance of the firm with respect to such factors as estimating, scheduling, cost controls, bid management, job site management, workplace safety, and status reporting.
- 4. The responsiveness to the criteria and information requested in the RFQ with respect to clarity, completeness, accuracy, and ease of comprehension for the reviewers.
- 5. Owner and Architect references.

6. Three (3) financial references.

A Selection Team will evaluate and rank each submittal and select, based solely on qualifications in this Step One of a two-step selection process, no more than five firms to move on to Step Two of the selection process.

Next step (Step Two) - A minimum of two (but no more than five) firms will be asked to submit additional information via RFP (a Request for Proposal). The RFP's will be due/turned in to the Owner at the time of the interview, including a proposed fee and price for fulfilling the general conditions, preconstruction services and fee for overhead & profit. Fee proposals will not be opened until after the interview scoring is complete.

To be clear: DO NOT INCLUDE ANY PROPOSED FEES, COSTS OR PRICING WITH THE RFQ (Request for Qualification).

Communications with Lebanon Schools' Administration, Board of Education members, and/or other Lebanon Schools staff in an effort to influence the outcome of the RFQ selection process is prohibited and will result in rejection of the Statement of Qualifications and Proposal.

4. CONTRACT NEGOTIATIONS

Only after the submission of responses to the RFP in Part Two of the process will Lebanon Schools attempt to negotiate and contract for the services described in this RFQ solicitation with the most qualified firms. As stated above, AIA documents A133 and A201 will be used for this project, as modified by the attached Supplementary Conditions. The District may negotiate changes to these documents in its sole and absolute discretion. If an agreement cannot be reached with the first selected firm, there will be an attempt to negotiate a contract with the next most qualified firm. This process will continue until an agreement is reached or all proposals are rejected.

5. ATTACHMENTS

NOTICE AND INSTRUCTIONS TO BIDDERS/VENDORS
AFFIDAVIT OF COMPLIANCE WITH SECTION 285.530 R.S.Mo
CERTIFICATION REGARDING ISRAEL
AFFIDAVIT OF COMPLIANCE WITH SECTION 161.371 R.S.Mo
AFFIDAVIT OF COMPLIANCE WITH SECTION 292.675 R.S.Mo
SUPPLEMENTARY CONDITIONS TO AIA DOCUMENTS A133 AND A201

Notice and Instructions to Bidders/Vendors

Sections 285.525 - 285.550 R.S.Mo - Effective January 1, 2009

Effective January 1, 2009 and pursuant to the State of Missouri's RSMo 285.530 (1), No business entity or employer shall knowingly employ, hire for employment, or continue to employ an unauthorized alien to perform work within the state of Missouri.

As a condition for the award of any contract or grant in excess of five thousand dollars by the state or by any political subdivision of the state (e.g., LEBANON R-III SCHOOL DISTRICT) to a business entity...., the business entity (Company) shall, by sworn affidavit and provision of documentation, affirm its enrollment and participation in a federal work authorization program with respect to the employees working in connection with the contracted services. Every such business entity shall sign an affidavit affirming that it does not knowingly employ any person who is an unauthorized alien in connection with the contracted services. (RSMo 285.530 (2)

Lebanon Schools will require the CMR to comply with State of Missouri Statute R.S.Mo 285.525 - 285.550.

Required Affidavit for Contracts over \$5,000.00 (US) – Effective 1-1-2009, Company shall comply with the provisions of Section 285.525 through 285.550 R.S.Mo. Contract award is contingent on Company providing an acceptable notarized affidavit stating:

- 1. that said company is enrolled in and participates in a federal work authorization program with respect to the employees working in connection with the contracted services and
- 2. that company does not knowingly employ any person who is an unauthorized alien in connection with the contracted services.

Copy of the affidavit is attached.

Additionally, Company must provide documentation evidencing current enrollment in a federal work authorization program, e.g. electronic signature page from E-Verify Program's Memo of Understanding (MOU).

Lebanon Schools encourages companies that are not already enrolled and participating in a federal work authorization program to do so. E-Verify is an example of this type program. Information regarding E-Verify is available at http://www.dhs.gov/xprevprot/programs/gc_1185221678150.shtm or by calling 888-464-4218.

AFFIDAVIT OF COMPLIANCE WITH SECTION 285.530 R.S.Mo FOR ANY PUBLIC WORKS PROJECT CONTRACT Effective August 28, 2009

STATE (OF MISSOURI, COUNTY OF	·	
As used • •	reduction operated by the United States Department program operated by the United States Department operated by the United States Department operated by the United States Demployees, under the Immigration Reform KNOWINGLY: A person acts knowingly or was a with respect to a person's conduct or the person's conduct or that those cires with the person of the person o	or service of any kind for hire within the Sta AM: Any of the electronic verification of want of Homeland Security or an equivalent Department of Homeland Security to verify an and Control Act of 1986 (IRCA), P.L. 99-60 with knowledge, to attendant circumstances when the person's conduct when the person is aware to the total act of the total act of the person is aware to the total act of the person is aware to the the total act of the person is aware to the the total act of the person is aware to the the total act of the person is aware to the total act of the person is aware to the person is aware to the person the person is aware to	york authorization programs to federal work authorization by information of newly hired 3. son is aware of the nature of that the person's conduct is
Before r	ne, the undersigned Notary Public, in and f		
		ally appeared	
	who, being duly sworn, states on his oath		
	My name is		
(2)	President of whose business address is authorized to make this Affidavit.		
(4) (5)	working in connection with the following s Contractor does not knowingly employ an services set forth above. Attached hereto is documentation affir	in a federal work authorization program w services contracted between Contractor ar y person who is an unauthorized alien in co	ith respect to the employees and Lebanon Schools. Innection with the contracted cipation in a federal work
Further	, Affiant sayeth not.		
		Signature of Affiant	
		Name:	
Subscri	bed and sworn to before me this	day of	20
My Com	mission Expires:	Notary Public	

CERTIFICATION REGARDING ISRAEL

1. Contractor hereby certifies in writing to LEBANON R-III SCHOOL DISTRICT as follows (for purposes of this certification, Contractor shall be referred to as Company):

That Company is not currently engaged in and shall not, for the duration of the contract, engage in a boycott of goods or services from the State of Israel; companies doing business in or with Israel or authorized by, licensed by, or organized under the laws of the State of Israel; or persons or entities doing business in the State of Israel.

2. As used in this certification, the following terms and phrases shall be defined as follows:

"Boycott Israel" and "boycott of the State of Israel", engaging in refusals to deal, terminating business activities, or other actions to discriminate against, inflict economic harm, or otherwise limit commercial relations specifically with the State of Israel; companies doing business in or with Israel or authorized by, licensed by, or organized under the laws of the State of Israel; or persons or entities doing business in the State of Israel, that are all intended to support a boycott of the State of Israel. A company's statement that it is participating in boycotts of the State of Israel; companies doing business in or with Israel or authorized by, licensed by, or organized under the laws of the State of Israel; or persons or entities doing business in the State of Israel, or that it has taken the boycott action at the request, in compliance with, or in furtherance of calls for a boycott of the State of Israel; companies doing business in or with Israel or authorized by, licensed by, or organized under the laws of the State of Israel; or persons or entities doing business in the State of Israel; shall be considered to be conclusive evidence that a company is participating in a boycott of the State of Israel; or persons or entities doing business in the State of Israel; provided, however that a company that has made no such statement may still be considered to be participating in a boycott of the State of Israel; companies doing business in or with Israel or authorized by, licensed by, or organized under the laws of the State of Israel; or persons or entities doing business in or with Israel or authorized by, licensed by, or organized under the laws of the State of Israel; or persons or entities doing business in the State of Israel if other factors warrant such a conclusion; and

a.) "Company", any for-profit or not-for-profit organization, association, corporation, partnership, joint venture, limited partnership, limited liability partnership, limited liability company, or other entity or business association, including all wholly-owned subsidiaries, majority-owned subsidiaries, parent companies, or affiliates of those entities or business associations.

In Witness Whereof, the foregoing certification is entered into as of	, 20
Contractor/Company:	
By:	
Authorized Representative/Party	

LEBANON R-III SCHOOL DISTRICT, LEBANON, MO

AFFIDAVIT OF COMPLIANCE WITH SECTION 161.371 R.S.Mo FOR ANY PUBLIC WORKS PROJECT CONTRACT

STATE OF	· · · · · · · · · · · · · · · · · · ·			
COUNTY OF) ss)			
Before me, the undersigned	Notary Public, in ar	nd for the County of		
State of	, persona	Illy appeared		(name)
Who is	(title) of		(Name of cor	mpany),
(a corporation), (a partner affidavit, and being duly swo		• • • •	lity company), and is author	ized to make this
		es in a Random Drug and the contracted services.	Alcohol Testing Program w	ith respect to the
The terms used in this affida	avit shall have the m	eaning set forth in Section	s 161.371 R.S.Mo, et seq	
		Signature		
		Name:		
Subscribed and sworn to be	fore me this	day of		20
		Notes D. L.		
		Notary Public		
My Commission Expires:				

LEBANON R-III SCHOOL DISTRICT, LEBANON, MO

AFFIDAVIT OF COMPLIANCE WITH SECTION 292.675 R.S.Mo FOR ANY PUBLIC WORKS PROJECT CONTRACT Effective August 28, 2009

STATE OF)	
COUNTY OF) ss)	
Before me, the undersigned Notary Public	, in and for the County of	
State of, pe	rsonally appeared	(name)
Who is	(<i>title</i>) of	(Name of company),
(a corporation), (a partnership), (a sole affidavit, and being duly sworn upon oath		lity company), and is authorized to make this
	erified the completion of a 10-ho tion with the contracted service	our construction safety program with respect to s.
The terms used in this affidavit shall have	the meaning set forth in Section	s 292.675 R.S.Mo, et seq
	Signature	
	Name:	
Subscribed and sworn to before me this _	day of	20
	Notary Public	
M. Commission Funitors		
My Commission Expires:		