



CHILDREN'S MUSEUM

Bakersfield Adventures for the Mind

REQUEST FOR QUALIFICATIONS (RFQ)

CONSTRUCTION MANAGEMENT "AT-RISK" SERVICES

Located on the California State University, Bakersfield Campus

New Facility Project

September 22, 2008

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BAKERSFIELD ADVENTURES FOR THE MIND CHILDREN’S MUSEUM

NEW FACILITY PROJECT

1. INTRODUCTION

The Bakersfield Adventures for the Mind (BAM) Children's Museum Board has recognized the need for an educational town square to be located in Bakersfield that invites children and their families to experience a hands-on science, technology, engineering, and math center. that will serve life long learners in a variety of fields in collaboration with the California State University, Bakersfield staff, student body, and private/public partners.

This invitation is to seek a Construction Management Firm for the challenge of creating this state of the art educational facility for the Bakersfield Adventures for the Mind (BAM) Children's Museum that will provide a safe, comfortable learning atmosphere, with a focus on a variety of indoor and outdoor site environments, and rotating exhibits. The building design will need to be a lesson in learning in and of itself incorporating green building guidelines. The building must also be designed to stand the test of time being unique and a stand out in the city and region. The facility will invite thousands of visitors annually of all ages to partake in fun, exploration and learning. It will serve as a key educational resource and community builder on a local, state and national level. The design plans will become a resource tool for other planners across the country that will strive to create similar Children's Museums on University campuses through out the country.

Bakersfield Adventures for the Mind (BAM) is soliciting written responses and presentations through this Request for Qualifications ("RFQ") from firms to provide Construction Management "At-Risk" (CM at-Risk) related services with respect to the Bakersfield Adventures for the Mind (BAM) Children's Museum.

After review of several similar projects, BAM has determined that in the best interest of the project, and because of the potential for various funding sources, the potential for donated materials and construction services, a CM at-Risk delivery was best suited for this project. Furthermore, given the current construction market and the potential for an adverse relationship between Owner and Contractor in the traditional design-bid-build delivery, an amicable relationship and team approach between BAM, the Architect, and the Contractor is desired.

For the purpose of constructing the proposed children's museum, it has been decided to create a team consisting of BAM (Owner), Taylor Teter Partnership/ Haizlip Studio (the Architect), and a Construction Manager at-Risk (CM) very early in the planning stages of this project. The benefits of this structure are clear - better overall project planning, lower management costs, better schedule control, limited cost adjustments and most importantly, a project that will allow BAM to maximize construction funding on facilities. The program goals are on budget, on time, and appropriate quality.

The project team will work together to develop the quality performance standards of expectation by establishing a design strategy balancing first cost, initial operating cost and maintenance cost. The Owner and Architect need input to the project of an active CM familiar with cost and schedules of similar projects in the region as well as construction means and methods.

The immediate goal is now to complete the team with a three-way partnership of Owner, Architect and a CM for design/construction of this project. The importance of this structure and the need for enduring quality of construction has dictated a selection emphasis based on the quality of CM and construction issues. The goal is to have a CM that will provide the highest quality of construction and the best value for the Bakersfield Community.

Another and very important goal is to forge a relationship of teamwork with the selected CM rather than the adversarial relationship that can exist with a traditional design-bid-build approach. BAM recognizes the value of an experienced CM partner and the significant contributions it can make to the success of the project. Early examples of this are constructability reviews of the architects' construction documents and value engineering of materials, systems and methods.

BAM also recognizes the important role that trade contractors play in the quality of construction of a facility of this type. The goal of this RFQ is to select the CM who can assist BAM in locating and contracting with the highest quality, responsible low bidders for all trade subcontractors that will provide the desired quality for this construction program. It should be noted, and clearly understood that all work must be publicly bid according to the Public Contract Code and will be subject to Prevailing Wage Laws and requirements.

2. OVERVIEW

As you walk in the entrance of Bakersfield Adventures for the Mind (BAM) Children's Museum you will step into a facility with stimulating, hands-on rotating and permanent exhibit areas inspiring imagination and engagement. Throughout the educational town square you will traverse through themed exhibit areas both indoor and outdoor that will immerse the visitor in different aspects of the physical world: the human body, the earth, technology and space exploration to name a few. You will find yourself engaged in a broad spectrum of learning themes in interactive, practical formats where you will be able to create your own experience and how you find yourself relating to the exhibits around you. In addition to being stimulated and challenged to experience new things, you will always be invited back to BAM to be treated to new and exciting rotating indoor and outdoor exhibits. The educational offerings will also continue to evolve and change adapting to the latest trends and demands of interactive experiences. BAM will be an arena in which the latest innovation and creative ideas from around the globe are showcased in an open ended, interactive format.

For information regarding BAM, please visit the website at www.bamforkids.org

(Adapted from the BAM Business Plan Objectives 2006)

3. GENERAL OBJECTIVE

The Bakersfield Adventures for the Mind (BAM) Children's Museum is seeking a Construction Management Firm to work with the BAM Building Committee and the previously selected Architectural and Engineering firm of Taylor Teter Partnership/ Haizlip Studio, to assist with the design/planning phase (pre-construction activities) and to oversee the bidding and construction of the site improvements, building shell and interior improvements of the museum.

The build-out of the special custom exhibits to be incorporated into the museum building may be contracted separately to other entities by BAM (Owner). In addition, and not by way of limitation, furniture, signage, telephone, audio-visual equipment, security equipment and other items may be purchased and provided by the Owner. During the pre-construction phase, the Construction Manager shall be responsible for coordinating and scheduling work contracted separately by the Owner.

All RFQ responses and fee proposals shall take into consideration the Construction Managers "Scope of Services" as outlined in Exhibit "A" and described elsewhere in this Request for Qualifications.

The CM Proposals will be reviewed by the BAM Building Committee. The BAM Building Committee will recommend a short-list of CM firms for follow-up interviews. The BAM Board will then receive a recommendation from the Building Committee for a vote of final approval.

4. BACKGROUND

Bakersfield Adventures for the Mind (BAM) Children's Museum will include 32,000 square feet of enclosed space with a combination of indoor and outdoor permanent and rotating exhibits. The present site is located on the south side of the California State University, Bakersfield campus.

The approximately four acre site is accessible to all areas of the city via automobile, public transportation and bike trail. There will be on site parking for approximately 100 vehicles and 5 buses. The museum is located on the University campus making it accessible for students to visit both the museum and campus during the same visit providing an opportunity for children and their families to become familiar with the campus and its offerings.

**Bakersfield Adventures for the Mind (BAM) Children’s Museum Objectives
adapted from the BAM Strategic Planning Session June 2007**

- Deliver top quality, interactive exhibits, programs, and learning materials that align with BAM mission and add relevancy and excitement to the growing community. BAM will become known for its hands-on, interactive fun that engages learners of all ages.
- Become known for being a center of collaboration bringing together young people and their families with college professors, students and civic and social organizations through out the region.
- BAM will become a liaison for corporations and companies that host educational opportunities for children through out the region based on themed exhibits and class offerings
- Ensure Financial Sustainability with strong programming, exhibit scheduling, educational outreach programs, on site educational offerings, an educational store, a café and an endowment fund
- BAM will provide and maintain a Learning Lab providing key curriculum learning materials and technical support for parents, educators, and students of both public, private and home school environments
- Work diligently to serve our diverse community by forming partnerships with a wide variety of civic and social groups that will enhance the effectiveness of BAM outreach and on site special programming
- BAM will seek diversity in its staff and volunteer base tapping into strong educational backgrounds, parental involvement and people with keen business skills
- BAM will strive to host “Splash Events” and other educational outreach programming offerings that provide a wow factor that brings fun and whimsy to its events
- BAM planners will strive to inspire young people to help them recognize their potential through learning experiences that excite them and introduce them to career pathways
- BAM will focus on providing fun, interactive learning experiences from a broad spectrum of learning areas including the sciences, humanities and the arts in a space that is conducive to family interaction
- BAM will be suitable for its intended audience of children, their parents, grandparents, caregivers and teachers

Highlights of Future Building

- BAM will need to be a building that is able to respond to the rotating exhibits and platforms needed to meet the public's demand for new and innovative offerings. The building must be able to change over time to continue to meet the needs of our growing region.
- BAM will need to be master planned with the idea of future Phase II and Phase III expansions and additions.
- BAM will need to be a sustainable building meeting a LEED Silver designation or higher and, in addition employing principles of sustainability giving special consideration to the following areas;
 - Constructability – being able to construct the building in the most efficient manner to provide for the best use of materials and labor
 - Modularity – the ability to be demounted or contracted or expanded upon demand
 - Flexibility – the ability to reuse components or change the original intended use
 - Functionality – integrating form and function for the user
 - Reuse – the ability to reuse components in a different environment thereby reducing cost
 - Management – the ability to adapt a space without reconstruction
 - Materials – the ability to select materials with a low ecological footprint
 - Cost – each incremental component that uses sustainable principles to reduce overall costs to the BAM project
 - Assets -- using sustainable principles that turn components into assets as opposed to demolished material in the case of change
 - BAM will need to be a project design that responds to environmental concerns and appeal
 - BAM will need to be a building that withstands the test of time
 - BAM will host exhibits that have been created in response to community input that are unique and memorable

5. RFP PROGRAM REQUIREMENTS

The new Bakersfield Adventures for the Mind (BAM) Children’s Museum is to contain the following:

- Front Porch Entrance
- Learning Grove
- Learning Lab
- Classrooms
- Café
- Educational Store
- Rotating and Permanent Exhibits
- Outdoor Sustainable Interpretive Landscape and Outdoor Exhibits
- Conference Room
- Administrative Offices
- Outdoor Amphitheater
- Birthday Party Celebration Center
- Parking
- And all other necessary ancillary facilities to support the public use of the facility and its intended goals.

6. LOCATION

The project is to be built on the south side of the California State University, Bakersfield campus and should be in agreement with CSUB Master Plan. The site is north of the Marketplace shopping center on Camino Media. The proposed site is highly visible to traffic traveling east and west on Camino Media.

7. SCHEDULE

A multiple phasing approach will be used to implement the master planned project for construction. Site planning, master planning, functional programming, exhibit planning with conceptual design will commence concurrently. Construction phasing will be tied directly to fundraising efforts of the BAM Children’s Museum Board.

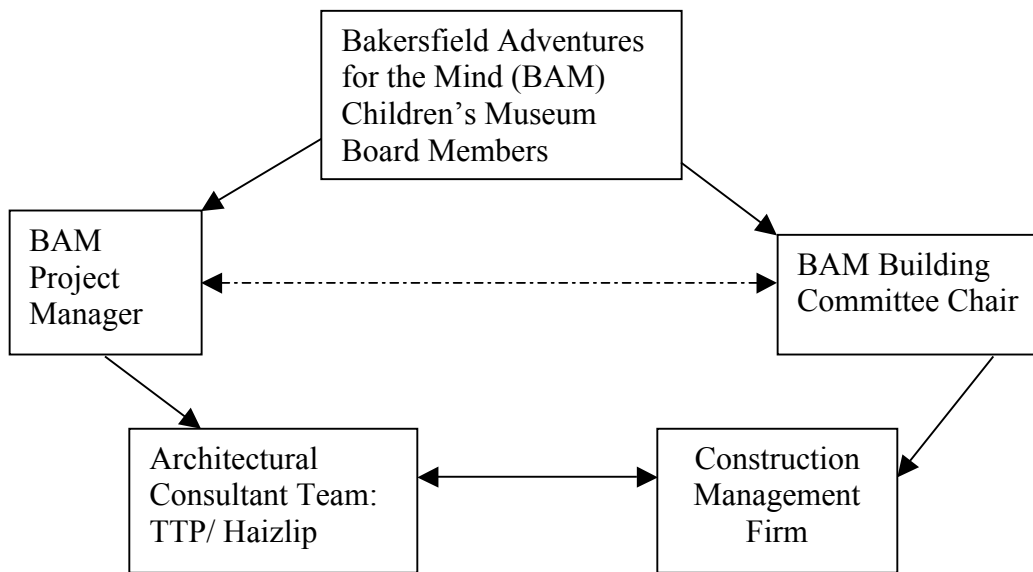
8. BUDGET

It is anticipated that various funding sources, both Public and Private, may contribute to the resources needed to fund this project. In the event that State and/or Federal grant money is secured, in addition to private funding, this project may still be subject to State and/or Federal Prevailing Wage laws as specified in the Davis-Bacon Act.

The development of each Phase of the Project will be contingent upon the success of the Development Campaign by BAM. BAM is responsible for securing the necessary funding to implement each Phase of the RFP. The timeliness of each Phase is dependent upon BAM’s ability to secure donations and raise funds. It is critical that building costs are flexible to the fund raising needs and are in phases to ensure best use of funds. The cost need to include any in-kind contributions and reflect the ability to leverage local resources.

9. PROJECT MANAGEMENT TEAM

The Bakersfield Adventures for the Mind (BAM) Children’s Museum will assign a Project Manager. The Chair of the BAM Building Committee and its members as well as the President and BAM Board members will support the Project Manager. The Executive Director, under the direction of the BAM Board and Building Committee, will represent the client and organize client and community stakeholder direction to the project. The Project Manager will represent Bakersfield Adventures for the Mind (BAM) Children’s Museum in all matters relating to the project. The Coordinating Architectural team (Taylor Teter Partnership/ Haizlip Studio) and BAM Building Committee and the Construction Management teams will report to the Project Manager throughout the Project. The Project Administration structure is as follows:



10. DELIVERY OF PROPOSALS

It is the consultant’s responsibility alone to ensure that the proposal is received by BAM prior to 5:00 PM on Tuesday September 30, 2008. Any proposals received by the BAM after that hour and date shall be returned unopened.

11. FORMAT OF PROPOSALS

All proposals (10 copies) shall be typewritten and submitted in a sealed envelope plainly marked on the outside: **“Sealed Proposal for CM Services – BAM Construction Management Proposal -- Do Not Open with Regular Mail.”**

Deliver to:
Jillian Fritch-Stump,
Postnet
PMB 116,6077 Coffee Road, Suite #4
Bakersfield, CA 93308

A. The proposal should respond to the requirements set forth in this Request for Proposal in a precise and logical manner. BAM will follow a qualifications-based selection process to rank consultants by the scoring criteria as described in Exhibit “C”.

B. Content of Proposal

The consultant shall include in its RFQ response, at a minimum, the following information presented in a clear and concise format, in order to demonstrate the consultant’s competence and professional qualifications for the satisfactory performance of the services outlined in the “Scope of Services” section of this Request for Qualification proposal.

1. Fee proposal. Provide a fee proposal in a sealed envelope (fee proposal will not be used as selection criteria). Include an anticipated payment schedule. The payment schedule should be broken down in a format addressing the design, bidding and construction phases.
2. A list of no more than five relevant projects for which the consultant has performed services of similar size, scope, and complexity. This list shall include the name, contact person, address, and phone number of each party for whom the service was performed, the dollar amount of the contract, and the date of performance. Prior experience in the planning and construction of children’s museum facilities or other similar museum facilities should be highlighted
3. An Organizational Chart of the Project Team and a list of the consultant’s principals, key employees, agents, and sub consultants, which the consultant anticipates assigning to this Project. This list shall include a summary of the qualifications, licenses, and experience of each key individual and the type of work to be performed by each individual. Special attention to work experience directly related to the construction of children’s museums will be highly valued.

Included in this section should be a Firm profile that will include at minimum; the Firm’s age, Firm History, Firm size, annual dollar volume of construction, MBE information, if applicable, and areas of specialties/concentration. A brief overview of the Firm’s projected workload over the next two years or any anticipated material changes in the Firm’s make-up that will impact this Project.

BAM will retain under its agreement with the successful consultant the right of approval of all persons performing under the agreement. Substitution of key personnel shall not be allowed without prior written approval of BAM. The substituted key personnel, if allowed by BAM, must be as qualified as the person they are replacing and shall be reimbursed at a rate not greater than the person they are replacing.

4. A statement of organizational structure (e.g., sole proprietorship, partnership, corporation, joint venture, etc.) information regarding the make-up of that structure (e.g., owner, partners, board of directors, joint venture partners, etc.) and a listing of financial references. Provide amounts and carriers of both general liability and professional liability insurance.
5. A description of the methods by which the consultant intends to perform the work set forth in the Scope of Services (see Section 9).
6. A list deliverables the consultant intends to provide to satisfy the requirements of the Scope of Services. (Including, but not limited to those listed in Section 9).
7. The RFQ response should identify potential problems and opportunities that may arise and approaches for dealing with them. Among the measures to be addressed:
 - a. Multiple funding sources with an array of requirements
 - b. Possibility of changes as projected fundraising proceeds
 - c. Working with volunteer and donated services and materials

12. PROPOSAL CONSULTANT AGREEMENT

Proposed Consultant Agreement will be submitted to the interviewing firms. The successful firm shall be designated as the “Consultant” upon award of contract by BAM. The consultant shall comply with all provisions of the Consultant Agreement. The successful proposal scope of work will become Exhibit “A” of the Consultant Agreement.

13. INTERPRETATIONS OF THE REQUEST FOR PROPOSAL

If the consultant is in doubt as to the meaning of any part of the Request for Qualification, or finds discrepancies in or omissions from the Request for Qualification, the consultant shall submit to BAM a written request for an interpretation or clarification prior to the time for opening the proposals. All such requests should be addressed to the Project’s Single-Point of Contact: Jillian Fritch-Stump, bamforkids@bakrr.com The Consultant shall be responsible for the prompt delivery of the request. BAM shall not be responsible for any explanation or interpretations of the Request for Proposal other than by written addendum delivered to each consultant. No oral interpretations of any provision in the Request for Proposal shall be binding upon BAM.

14. EVALUATION PROCESS

Submissions will be evaluated by the Bakersfield Adventures for the Mind (BAM) Children’s Museum Building Committee and Board creating appointed personnel of both internal and

external community members comprising the “Evaluation Team”. Interviews and presentations must be conducted only with those Proponents who are short listed. Throughout all phases of the evaluation process, the Evaluation Team may, at its discretion,

- Seek additional clarification on any aspect of the Proposal submitted; and
- Perform reference checks as required to verify or clarify the information provided and to obtain any additional performance information necessary

The External participants of the Evaluation Team may include members knowledgeable of the Bakersfield Adventures for the Mind (BAM) Children’s Museum project and the building industry.

The Evaluation Team will select successful proponents based on the submissions received and their respective presentation/interview.

15. DISCREPANCIES AND MISUNDERSTANDINGS

By submitting a response to this RFQ, proposers are representing that they clearly understand the anticipated and expected scope of services as outlined herein. Consultants must satisfy themselves by examination of the BAM supplied documents, and by any other means they may believe necessary, as to the actual conditions and requirements under which the Construction Management services must be performed. No consultant shall at any time after submission of a proposal make any claim or assertion that there was any misunderstanding or lack of information regarding the nature or amount of work necessary for the satisfactory completion of the job. Any errors, omissions, or discrepancies found in this Request for Qualifications shall be called to the attention of the BAM contact and clarified prior to the submission of proposals.

16. AWARD OF AGREEMENT

The award of the Consultant Agreement, if made by BAM, will be based upon a total review and analysis of each proposal. After the proposal review, all prospective consultants shall be ranked. An interview of the top-ranked consultants will be conducted after the proposal review. At the conclusion of interviews, a final consultant ranking will be established and presented to the BAM Board for approval. Further negotiations will be conducted to reach a fair and reasonable fee. If a fair and reasonable fee cannot be agreed upon with the top-ranked consultant, negotiations will end and the BAM contact will begin negotiations with the next ranked consultant, and so forth, until a consultant is chosen for the negotiated fee. Once negotiations have been terminated with a firm and begun with another, they will not be reopened with the former firm. The successful consultant shall receive from the BAM, a “Consultant Agreement” in triplicate for signature. The Agreement shall be binding on the BAM and the Consultant only when signed by authorized representatives of the respective parties.

17. SCOPE OF SERVICES

The scope of services set forth in this Request for Qualifications represents an outline of the services which BAM anticipates the successful consultant to perform, and is presented for the primary purpose of allowing BAM to compare proposals.

It is expected that the Consultant will review the areas identified under the RFQ and as indicated in Exhibit “A” for evaluation. These components are ‘first look’ areas, and are not intended to limit review topics (if others exist) necessary to the successful execution of the Project.

18. TENTATIVE RFQ/ INTERVEIW SCHEDULE

It is recognized that this timeline may be revised as needed. Evaluations, selection, and recommendation will be based on your firm's response, demonstrated competence, and overall qualifications as presented within your application/letters, and statement of qualifications, and finalist interviews. If contract negotiations are not successful with the approved firm, negotiations will commence with the firm next selected.

The following are activity deadlines for the RFQ Process:

<u>Activity</u>	<u>Target Date</u>
RFQ Release	September 22, 2008
RFQ Closing	September 30, 2008 @ 5:00 PM
Potential Presentation/Interviews	October 2, 2008 from 9:00 am to Noon

At its sole discretion Bakersfield Adventures for the Mind (BAM) Children's Museum reserves the right to modify any of the target dates.

19. CONSTRUCTION MANAGER

The purpose of this RFQ is to select a Construction Management firm for the proposed museum project. The Construction Manager will use a multiple prime delivery method. The Construction Manager will assist BAM Museum Board with general oversight of the overall project/construction schedule, the overall project/construction budget and will provide oversight and review of the Architect's design documents for constructability during each design phase. They will work with the Owner and the Architect to provide services for evaluation of the method/system to be used on the project. BAM is considering construction management at-risk versus standard construction management contracts.

20. INSURANCE

Proponents will be required to adhere to the following insurance requirements.

Insurance by the Design and Construction Professionals.

- Licensed Professionals
- Workman's Compensation
- Automobile Liability Insurance
- Commercial General Liability Insurance
- Property Insurance
- Such other insurances as is mutually agreed upon between CSUB, Bakersfield Adventures for the Mind Children's Museum and the design and construction professional.
All deductibles shall be to the account of the selected sub-consultant(s).
- Insurances as required by CSU system.
- Professional Errors & Omissions Insurance

Insurance by Bakersfield Adventures for the Mind (BAM) Children's Museum

Bakersfield Adventures for the Mind (BAM) Children's Museum will obtain the following insurances on behalf of Bakersfield Adventures for the Mind (BAM) Children's Museum, the

Project Manager, Coordinating Exhibit Planner, sub consultants, all contractors and sub-contractors and all other specialty sub-consultants employed on the project:

- Wrap Up General Liability Insurance

EXHIBIT “A”
CONSTRUCTION MANAGEMENT AT RISK
SCOPE OF SERVICES
FOR
BAKERSFIELD ADVENTURES FOR THE MIND CHILDREN’S MUSEUM

SCOPE OF WORK

1.0 PRE-CONSTRUCTION SERVICES

- 1.1 Develop a Project Strategy.** The CM will immediately upon award be required to become a proactive member of the BAM planning design and construction team. The team will require full time participation from the CM project manager, the Architect, and the Owner. The objective of this step will be to develop an overall program strategy as relates to phases, timing, budgets, construction materials, means and methods and the program interface during construction.
- 1.2 Consultation During Project Development.** Schedule and attend meetings with the Architect during the development of design to advise on selection of materials, building systems and equipment. Provide recommendations on construction feasibility, availability of materials and labor, time requirements for installation and construction, and factors related to cost including costs of alternative designs of materials, preliminary budgets, and possible economies.
- 1.2.1 Perform constructability review at 75% completion of all plans and specifications.
- 1.2.2 Prepare "value engineering" recommendations based upon completion of the Design Development phase.
- 1.3 Scheduling.** Develop a project time schedule that coordinates and integrates the Architect's design efforts with bidding schedules. Update the project time schedule monthly incorporating a detailed schedule for the bidding of the project, including realistic activity sequences and durations, allocation of labor and materials and delivery of products requiring long lead-time procurement. Include BAM’s requirements (including but not limited to on-going CSUB campus occupancy) showing portions of the project having priority and showing other ongoing operational requirements.
- 1.4 Project Construction Budget.** Prepare a project budget as soon as major project requirements have been identified and update as required for approval by the BAM Board. Prepare an estimate based on a quantity survey of drawings and specifications at the end of the schematic phase and design development phase for approval as the BAM project construction budget. Update and refine this estimate two more times at 50% and, 90% construction documents for BAM Board approval as the development

of the drawings and specifications proceeds and advise the Owner and the Architect if it appears that the project construction budget will not be met and make recommendations for corrective action.

1.4.1 Establish a mutually agreed construction contingency, which is under the control of the Owner.

1.4.3 Develop an effective system of project cost control by phase. Revise and refine the initially approved project construction budget, incorporate approved changes as they occur, and develop cash flow reports and forecasts as needed.

1.5 Construction Planning/Bidding. Prepare bid packages for multiple trade contractors to ensure delivery by the required dates.

1.5.1 Make recommendations to BAM and the Architect regarding the division of work in the drawings and specifications to facilitate the bidding and awarding of contracts, allowing for phased construction taking into consideration such factors as time of performance, availability of labor, overlapping trade jurisdictions, and provisions for temporary facilities.

1.5.2 Review the drawings and specifications with the architect to eliminate areas of conflict and overlapping in the work to be performed by the various trade contractors.

1.5.3 Develop a contractor pre-qualification process similar to the CM selection process as working drawings and specifications are completed. BAM must approve this process. Upon CM at Risk's review and completion of the contract documents and after approval by the Owner, CM shall put the project, by phase, out for competitive bids to a broad market (minimum of three) prequalified trade contractors and suppliers in all trades as jointly selected by Owner and CM.

1.5.4 Establish procedures for coordination among BAM, Architect, trade contractors, and CM with respect to all aspects of the project and implement such procedures.

1.5.5 CM shall hold a pre-bid conference with all contractors to answer questions and to identify errors and omissions. The Owner and Architect shall attend said meetings. CM and architect will work closely to qualify, analyze, and review all bids. It is BAM's intent to have an open book bid review process in which the key members of the Project Team are involved in the clarification of work scope, compliance with contract documents and pricing to determine jointly to which trade contractors and suppliers the specific trade work will be awarded. The trade contracts will be awarded by BAM and, upon award, will be assigned to the CM at Risk. The CM shall manage the work of the contractors and manage payments to the trade contractors in accordance with the cost summary and budget approved by the Owner.

- 1.5.6 CM shall be responsible that all work scope by phase for the entire project will be analyzed and awarded no later than 30 days after bid taking unless extended in writing by BAM upon reasonable request by the CM, which request shall not cause any delay in CM achieving substantial or final completion. After the guaranteed maximum price by phase is established, CM at Risk shall be fully responsible for any incomplete or missing materials, equipment, devices, CM project -trade, and work scope.

2.0 CONSTRUCTION SUPPORT

- 2.1 Project Control.** Monitor the work of the contractors and coordinate the work with the activities and responsibilities of the Owner and CM to complete the project in accordance with BAM's objectives of cost, time and quality.

- 2.1.1 Maintain a competent full-time staff at the project site to coordinate and provide general direction of the work and progress of the trade contractors on the projects.
- 2.1.2 Establish on-site organization and lines of authority in order to carry out the overall plans of the construction team.
- 2.1.3 Implement procedures for coordination among the Owner, Architect, trade contractors, and CM with respect to all aspects of the project.
- 2.1.4 Schedule and conduct weekly progress meetings at which subcontractors, the Owner, Architect and CM can discuss jointly such matters as procedures, progress, problems, and scheduling.
- 2.1.5 Provide regular monitoring and twice monthly updates of the schedule as construction progresses. Identify potential variances between scheduled and probable completion dates. Review schedule for work not started or incomplete and recommend to the Owner and contractor adjustments in the schedule to meet the probable completion date. Provide summary reports of each monitoring and document all changes in schedule. Document all changes in schedule where delays are concerned.
- 2.1.6 Determine the adequacy of the contractors' personnel and equipment, and the availability of materials and supplies to meet the schedule. Recommend courses of action to the Owner when requirements of a trade contract are not being met.

- 2.2 Cost Control.** Monitor project cost by phase. Revise and refine the initially approved project construction budget, incorporate approved changes as they occur, and develop cash flow reports and forecasts as needed. Identify variances between actual and budgeted or estimated costs and advise the Owner and Architect whenever projected cost exceeds budgets or estimates.

- 2.2.1 Maintain cost accounting records on authorized work performed under unit costs, actual costs for labor and material, or other bases requiring accounting records. Afford the Owner access to these records and preserve for a period of three (3) years after final payment.
 - 2.2.2 Monitor and audit any certified payroll records of trade contractors to insure compliance with state laws.
- 2.3 **Cost Adjustments.** Develop and implement a system for the preparation, review, and processing of cost adjustments recommended necessary or desirable to the Owner and the Architect; review requests for changes; submit recommendations to the Owner and the Architect; and assist in negotiating cost adjustments.
- 2.4 **Payments to Contractors.** Develop and implement a procedure for the review, processing, and payment of applications by contractors for progress and final payments.
- 2.6 **Permits and Fees.** Architect will take lead role in securing plan check approval from the various agencies having jurisdiction over the project. This excludes permits for inspection, utility connections or temporary facilities required to be obtained directly by the various trade Contractors. All fees will be paid by the Owner. Architect will work to obtain approvals from all the authorities having jurisdiction including DSA and the Board of Trustees from the Cal State University system. CM will assist the Architect and BAM with these tasks.
- 2.7 **Assistance with the Selection of Additional Consultants.** If required, assist BAM in selecting and retaining professional services of testing laboratories and special consultants and coordinate these services, without assuming any responsibility or liability of or for these consultants.
- 2.8 **Inspection.** Monitor the work of trade contractors to eliminate defects and deficiencies in the work and coordinate with the architect's responsibilities for inspection.
 - 2.8.1 Review the safety programs of each of the trade contractors and make appropriate recommendations to insure conformance with the CM's overall safety plan. In making such recommendations and carrying out such review, he shall not be required to make exhaustive or continuous inspections to check safety precautions and programs in connection with the project. The performance of such services by the CM shall not relieve the trade contractors of their responsibilities for the safety of persons and property and for compliance with all federal, state and local statutes, rules, regulations, and orders applicable to the conduct of the work. This shall not negate the CM responsibility for overall project safety.

2.8.2 Coordinate with special inspectors and the Architect needed to verify materials and methods used in the building construction. This shall include special state ORS inspectors.

2.8.3 Conduct weekly job site meetings to address on-site issues, as required.

2.9 Document Interpretation. Refer all questions for interpretation of the documents prepared by the Architect to the Architect with an RFI procedure

2.10 Shop Drawings and Samples. In collaboration with the Architect, establish and implement procedures for expediting the processing and approval of shop drawings and samples.

2.11 Reports and Project Site Documents (for each phase) Record the progress of the project. Submit written progress reports to the Owner and the Architect including information on the contractor's work-and the percentage of completion. Keep a daily log available to the Owner and the Architect.

2.11.1 Maintain at the project site, on a current basis: records of all necessary contracts, drawings, specifications, samples, purchases, materials, equipment, maintenance and operating manuals and instructions, and other construction related documents, including all revisions.

2.11.2 Obtain data from contractors and maintain a current set of records, drawings, specifications, and operating manuals. At the completion of the project deliver all such records to BAM.

2.12 Administration of General or Trade Contractors

2.12.1 Provide fulltime on-site administration of the project as previously defined.

2.12.2 Assist the Inspector in observing the materials and equipment being incorporated into the work to assure that they are handled stored and installed properly and adequately and are in compliance with the Contract Documents for the project. Report to BAM regarding these activities.

2.12.3 Assist the Inspector in observing the Contractor's work to verify that all authorized changes are properly incorporated into the project. Report to the Owner regarding these activities.

2.12.4 Identify problems encountered in accomplishing the work and recommend appropriate action to the Owner to resolve these problems with a minimum effect on the timely completion of the project.

2.12.5 Not issue instructions contrary to the agreement between the Owner and Contractor, or between the Owner and Architect. All changes to the

agreement between the Owner and Contractor shall be by change order executed by the Owner. Communication between the Construction Manager and the trades subcontractors with regard to inspection shall not in any way be construed as binding the Owner or releasing the Contractor from fulfillment of any of the terms of their contracts. The Construction Manager construction administration activities:

2.12.5.1 Shall not relieve the Contractor of his obligation to perform the work in strict conformity with the agreement between the Owner and Contractor, the Contract Documents in strict conformity with all other applicable laws, rules and regulations: or Construction Manager liable for, or and insurer of, performance of the Contractor; or

2.12.6 Assist the Architect and Inspector with monitoring certified payroll for the entire project.

3.0 PROJECT COSE-OUT (BY PHASE)

- 3.1 Substantial Completion.** Determine substantial completion of the work or designated portions thereof, and in concert with the Architect, prepare a list of incomplete or unsatisfactory items and a schedule for their completion.
- 3.2 Start-Up.** With the Owner's maintenance personnel, direct the checkout of utilities, operations systems and equipment for readiness and assist in their initial start-up and testing by the trade contractors.
- 3.3 Final Completion.** Determine final completion and provide written notice to the Owner and Architect that the work is ready for final inspection- Secure and transmit to the Architect required guarantees, affidavits, releases, bonds and waivers. Turn over to the Owner all keys, manuals, record drawings and maintenance stocks.
- 3.4 Warranty.** Where any work is performed by the CM at Risk's own forces or by trade contractors under contract with the CM, the CM shall warrant that all materials and equipment included in such work will be new, unless otherwise specified, and that such work will be a good quality, free from improper workmanship and defective materials, and in conformance with the drawings and specifications. With respect to the same work, the CM further agrees to correct all defective material and workmanship for a period of one year from the date of substantial completion, or for such longer periods of one year may be set forth with respect to specific warranties contained in the trade sections of the specifications. The CM shall collect and deliver to BAM any specific written warranties given by others.

END OF EXHIBIT "A"

EXHIBIT "B"- CONSULTANT (CM) INFORMATION

Consultant certifies that the following information is true and correct:

Consultant's Name _____

Business Address _____

Business Telephone _____

The following are the names, titles, addresses, and telephone numbers of all individuals, firm members, joint ventures, and/or corporate officers having a principal interest in this proposal.

The dates of any voluntary or involuntary bankruptcy judgments against any principal having an interest in this proposal, or any firm, corporation, partnership or joint venture of which any principal having an interest in this proposal was an owner, corporate officer, partner, or joint venture are as follows:

IN WITNESS THEREOF, CONSULTANT executes and submits this proposal with the names, titles, and seals of all aforementioned principals this _____ day of _____ 20____.

CONSULTANT _____

END OF EXHIBIT "B"

EXHIBIT “C”- SCORING CRITERIA
BAM CHILDREN’S MUESUM
Evaluation Criteria

A. SUMMARY OF EVALUATION PROCESS

This selection is a two (2) stage process in which each step has been weighted and included in a total score to select the most qualified firm as a partner with BAM to construct the proposed Children’s Museum. The two stages are:

Stage I.	Evaluation and Scoring of Statements of Qualifications
Stage II.	Interview Evaluation

B. EVALUATION OF STATEMENTS OF QUALIFICATIONS (Stage I)

The Statements of Qualifications will be evaluated and each CM at-Risk firm assigned a weighted score based upon the following criteria. The Statements of Qualifications will be independently evaluated by the members of the BAM Building Committee.

The independently established point scores based on the criteria listed below will be averaged to establish the final weighted score for Stage I.

The following criteria will be used in evaluating and rating Statements of Qualifications from interested CM firms. BAM reserves the right, however, to modify these criteria and to add or delete criteria at its sole discretion at any time prior to completion of the selection process.

1. **Prior CM at-Risk Experience.** Previous, or current, projects of the CM at-Risk on similar types of projects.
2. **Success of Comparable Undertakings Related to the Following:**
 - Experience in managing similar large children’s museum projects or similar projects of similar scale and complexity constructed by a CM at-Risk;
 - Experience with other facilities built upon Cal State University campuses. Additional weighting shall be given to this criteria for those firms demonstrating a proven track record working within the Cal State University system;
 - Experience with cost of the work plus a lump sum management fee to a guaranteed maximum contract delivery process with all trade contracts competitively bid;
 - Public projects (emphasis on museum construction) of similar scope and size;
 - Performance on previous projects relating to budget and schedule compliance;

- Experience with Leadership in Energy and Environmental Design (**LEED**) certified projects and sustainable construction technologies.
 - Willingness of CM to consider in-kind donations of materials and/or labor for incorporation into the construction of the proposed museum.
3. **Project Management Methodology.** Quality, appropriateness and thoroughness of the project management plan workable approach to the multi-contract implementation process. Emphasis will be placed on budget development and control and schedule development and control.
 4. **Quality Control.** Quality, appropriateness and thoroughness of quality control techniques and operations.
 5. **Personnel.** Staff assignment to the key roles and commitment by them to carry out this CM at-Risk project.
 6. **Bonding Capability** will be evaluated to determine the total bonding capacity and the amount unused and available for this project.
 7. **Compensation Experience Modification Factor** will be evaluated to determine the ability of the CM at-Risk to undertake this project.
 8. **Financial Strength** will be evaluated to determine the financial ability of the CM at-Risk to undertake this project.

C. EVALUATION OF INTERVIEWS (STAGE II)

In the interview, BAM will serve as a facilitator and the selection committee will be made up of members of the Building Committee, the Architect and the BAM Project Manager.

Immediately after all interviews are completed, each member of the selection committee will assign a point score for each candidate based on the criteria listed below. These scores will then be averaged to establish the final raw score for Stage II.

The following criteria will be used in evaluating and rating the interviews with CM at-Risk candidates:

1. **General Approach and Experience Relative to the Proposed Museum Project.** The presentation should address the overall approach to this specific project and the organization proposed. Show how your experience matches up successfully to the project objectives stated.

2. **Proposed Management Techniques to be Employed on this Specific Project.** The presentation should cover the tools and techniques to be used during the following tasks:
 - Preconstruction activities
 - Interface with the architect
 - Trade contractor selection
 - Value engineering
 - GMP finalization (including contingencies)
 - Schedule establishment and monitoring methods
 - Budget establishment and controls
 - Quality control and safety methods
 - Project close out and acceptance procedures
3. **Specific Personnel Assigned to the Project.** Qualifications, experience and special skills of the team.
4. **Project Understanding and Commitment.** The interview panel's impression of the CM's understanding of the project's vision and how it will be made into a reality.

END OF EXHIBIT "C"

END OF REQUEST FOR QUALIFICATIONS