

Request for Qualifications

Program Management Services

Prepared By:

Rochester Joint Schools Construction Board

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**PROGRAM MANAGEMENT
REQUEST FOR QUALIFICATIONS**

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PROGRAM MANAGEMENT REQUEST FOR QUALIFICATIONS

The purpose of this Request for Qualifications (RFQ) is to determine if there are qualified firms or project teams to provide the Rochester Joint Schools Construction Board (RJSCB) with program management services for a \$325 million project to renovate 13 school buildings in the Rochester City School District. Construction costs are expected to exceed \$225 million.

The RJSCB is an agent of the City of Rochester and the Rochester City School District as authorized by Chapter 416, Laws of New York State 2007. The principal offices of the RJSCB are located on the second floor of the Rochester City School District's Congress Avenue Facility, 353 Congress Avenue, Rochester, New York, 14619.

Based on the review of the RFQ Submissions the RJSCB intends to issue a Request for Proposals (RFP) to qualified respondents who may then be invited to enter into a contract to provide the services described herein.

Please note: For the RFP process, individuals/firms will be required to submit the names and resumes of all professionals to be assigned to the project and to identify the project manager or lead who will be the RJSCB's point of contact. This information is not required for this RFQ.

1. SCOPE AND CLASSIFICATION

The Rochester City School District and the City of Rochester, through the Rochester Joint Schools Construction Board (RJSCB) seek an independent Program Management firm that will be hired by and report directly to the RJSCB to:

1. Act as the Rochester Joint Schools Construction Board's agent;
2. Interface with Rochester City School District (RCSD) staff as the staff develops a Master Plan for Phase I of the Facilities Modernization Program ("Program");
3. Assist with presenting the Comprehensive Master Plan for Phase 1 to the community;
4. Advise the RJSCB on all aspects of the Program, including but not limited to financing, design and construction, means and methods, labor relations/MWBE, communication and public relations.
5. Identify and recommend qualified architectural and engineering firms to design projects identified and approved for renovation in the master plan, identify and recommend qualified construction firms to perform as either the construction manager or prime contractors as appropriate for identified projects.
6. Coordinate and facilitate the presentation of detailed design and construction plans of projects approved in the Phase I Master Plan to the specific neighborhood served by that school.
7. Provide progress reports to the Board on a monthly basis for each approved project.
8. Prepare annual and other reports as may be specified and required by the RJSCB.

2. QUALIFICATIONS/RESPONSIBILITIES

The Program Manager shall have experience in planning, designing, constructing and or reconstructing existing K-12 public school buildings, as well as public facilities, commercial facilities, and/or infrastructure facilities. The Program Manager shall also have experience in the negotiation and management of labor contracts and agreements, training programs, educational programs, and physical technological requirements for educational programs. The Program Manager will manage all projects undertaken pursuant to the direction of the RJSCB under the Facilities Modernization Program as authorized by New York State law.

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Responsibilities include but are not limited to:

- Review and approval of project schedules and payment schedules; preparation of cost estimates; and assessment of the safety programs of the contractors and all training programs, as required.
- Implementation of procedures for verification by the Program Manager that all work for which payment has been requested has been satisfactorily completed. This verification must fulfill the requirements of the New York State Office of the State Comptroller.
- Executing communications and public relations related to the implementation of Phase I of the Rochester Facilities Modernization Program. The plan will need to include both preparation of press releases and the development and maintenance of a website to provide overall Program and specific project updates as well as permitted community inquiries to specific projects and the overall program.
- Collaboration with the Independent Compliance Officer to achieve the M/WBE/DBE utilization plan. The RJSCB will be hiring the Independent Compliance Officer through a separate process.

PLEASE NOTE: *The Program Manager, and its affiliates or subsidiaries, if any, shall be prohibited from awarding contracts or being awarded contracts for, or performing work on, projects undertaken under the RCSD Facilities Modernization Program.*

3. Rochester City School District (RCSD) Overview

The RCSD owns fifty school buildings. Nearly half are more than 75 years old. It operates twelve schools that have some portion of the building that is more than 90 years old. The average age of the 12 oldest schools in the district is 99 years old, each having been built between 1898 and 1917. Another dozen of the RCSD's buildings are at least 75 years old.

The RCSD maintains approximately 7.41 million square feet of educational and administrative space in owned and leased facilities. Thirty-seven elementary school buildings represent 2.978 million square feet of this total, while 14 secondary school buildings account for 3.70 million square feet. RCSD-owned elementary school buildings average 77 thousand square feet, while secondary schools average 260 thousand square feet (these totals exclude transportable classroom buildings and any City of Rochester/RCSD shared space).

The average age of RCSD-owned school buildings is 64 years old. Given the number and overall age of the buildings in the inventory, there is a constant demand for building repair or upgrading. The RCSD does not have any buildings that have dangerous conditions; however, given the nature and use of the buildings it still must maintain a constant emphasis on long-term building maintenance.

The RCSD serves approximately 33,000 students in pre-kindergarten through grade 12.

Following a period of declining enrollment, the student population in the late 1980s grew by 5,000 in just over five years. To serve this larger student population, the RCSD embarked on an ambitious project to build five new schools. This positioned the District to close its older schools when the time was right. That closure plan was not executed because of further enrollment increases in the mid-1990s.

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Today, the RCSD is experiencing a period of enrollment decline. By 2012, the kindergarten through grade twelve enrollment will have declined by almost 20% from a high of 37,000 K-12 students in 1998 to approximately 30,000. This decline is primarily attributable to demographic changes including declining population and a significant drop in the number of live births in the City of Rochester. The change has also been influenced by the development of charter schools.

The rate of enrollment decline has lessened from that which was previously projected because of two factors. The first was the closing of the two largest charter schools in the City of Rochester at the end of the 2004 – 2005 school year. Then last year, the Rochester Catholic Diocese closed all but two of the elementary schools that typically serve the City of Rochester students. When the charter schools closed, the District had more than 1,200 students return who had previously been attending these two schools. These students were placed into existing schools where excess capacity provided the flexibility to address this situation without negatively affecting class sizes or operational capacity limits. There was not a significant impact from the closing of parochial schools as the students were assigned to available spaces in District schools.

While there is more capacity in schools than in recent history, rooms are currently being utilized in a number of useful ways to improve instruction and accommodate different demands placed on schools. These demands include maintaining low class size, providing pre-K classrooms, creating labs for computers and other technologies, expanding Special Education rooms to full-size, and providing space for school-based health centers and Student and Family Support Centers. All of these measures help to improve the overall delivery of a quality instructional program and a quality learning environment.

While the District has been able to take advantage of the decline in enrollment to reduce overcrowding in some schools and create smaller learning communities in others, the District fully recognizes the need to reduce the overall number of facilities it operates. The Facilities Modernization Program will serve as additional impetus to identify schools that can be removed from the District inventory in the future. The Program Manager will assist the District in the design of the plan to right-size the District including the consolidation, closing and disposition of the District's facilities upon completion of the projected multi-phase Facilities Modernization Program.

4. SUBMISSION INFORMATION

Submissions must be received in the office of the Rochester Joint Schools Construction Board no later than 4:00 PM (Eastern Daylight Time) on September 3, 2009. Submissions will be accepted between 9 a.m. and 4 p.m. Monday through Friday excluding holidays.

Individuals/firms must submit **one signed original** Submission set. The original must be clearly marked. **Eight (8) copies** must also be submitted, clearly marked, and each copy in its own binder. Individuals/firms must submit one Portable Document File (.pdf) electronic version on a compact disc. The CD is to be enclosed with the signed original.

An electronic version of this document will be made available to each individual/firm in preparing Submissions. Submissions must be submitted as stipulated above to:

Rochester Joint Schools Construction Board
ATTN: Ms. Linda Dunsmoor, Administrative Director
Congress Avenue Facility
353 Congress Avenue
Rochester, NY 14619

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The package shall be marked “**SEALED SUBMISSION -TO BE OPENED BY ADDRESSEE ONLY. – Date Here**”. Please ensure that your name/firm's name is included on the outside of the package. If you are using a commercial delivery company that requires you to use its shipping package or envelope, your Submission should be placed within a second sealed package labeled as detailed above. This will ensure your Submission is not prematurely opened.

Individuals/firms not able to submit a Submission are asked to inform the RJSCB of their regrets and interest in future work, in writing, in order to be considered for future solicitations. This letter should be directed to the above address.

Submissions not received by the time and date shown above will not be considered and shall be disqualified. There will be no exceptions.

All Submissions must include a clearly referenced index that corresponds to the format of the original RFQ document. Major sections must be separated by appropriately labeled index tabs. In order to be considered, Submissions must be clearly labeled, concise and easy to follow as directed below.

5. REQUIREMENTS / FORMAT

The RJSCB has established the following criteria to be provided by the successful individual/firm. The RJSCB reserves the right to revise the scope of services prior to the execution of a contract to (1) reflect changes arising out of this RFQ process; (2) incorporate any RJSCB requirements adopted after the publication of this Request for Qualifications and (3) incorporate any other changes it deems necessary.

All Submissions must contain a Statement of Work that at a minimum clearly identifies sections that address the areas below.

Provide a brief history and description of the individual/firm including a presentation of qualifications, limited to not more than ten pages, exclusive of resumes and other forms.

- a. Provide a summary of experience you have with the subject scope of work. Identify specific qualifications that you believe especially qualify you or your firm to perform this work.
- b. Identify all similar engagements that you have performed within New York State and the dates you provided same.
- c. Provide a description, location, date of completion and client contact person regarding services carried out by you or your firm within the last five years that are comparable in scope to the proposed project.
- d. Provide contact information for at least three references for which you or your firm has provided services comparable to the scope of the services set forth in Section 1.
- e. Disclose actual or potential conflicts of interest to accepting an award of a contract with the RJSCB, and if a conflict of interest exists, the manner in which said conflict of interest would be rectified, if said contract is awarded to the individual/firm.

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- f. Sample of your own or your firm's contract.
- g. Describe any recommendations or suggestions above and beyond the requirements listed in the RFQ.
- h. Provide data on M/WBE participation goals and achievement in previous projects.

6. COMMUNICATIONS / CORRESPONDENCE

All communications and correspondence relative to this RFQ should be sent by electronic mail to: Linda.Dunsmoor@rcsdk12.org

7. QUESTIONS

To assist any and all individuals/firms in obtaining clarity of scope and a clear understanding of the requirements of this RFQ, individuals/firms may present clarifying questions. All questions should be submitted via email to Linda.Dunsmoor@rcsdk12.org by 4 p.m. (EDT) on August 10, 2009. Questions and the resulting answers will be sent via email to all interested parties by August 12, 2009.

A pre-Submission conference will be held on August 17, 2009 at 10:00 a.m. (EDT). Contact Linda.Dunsmoor@rcsdk12.org via email by August 14, 2009 at 10 a.m. with the name(s) of those who will be participating in the conference. This conference will be held at the offices of the RJSCB, 353 Congress Avenue, Rochester, NY 14619. Attendance at this conference is not mandatory.

8. TIME FRAME / KEY DATES

The following timeline is subject to change by the RJSCB.

EVENT	DATE
Issue RFQ	August 3, 2009
Clarification Questions Due	August 10, 2009 by 4 p.m. EDT
Clarification Answers Provided	August 12, 2009
Pre-Submission Conference Attendance Notification Due	August 14, 2009, 10 a.m. EDT
Pre-Submission Conference (non-mandatory)	August 17, 2009, 10 a.m. EDT
Pre-Submission clarifications provided	August 19, 2009
Deadline for receipt of RFQ Responses	September 3, 2009, 4 p.m. EDT

9. SELECTION PROCESS \ REVIEW TEAM

After the RJSCB evaluation team has reviewed all of the Submissions, the members will make a decision based upon their examination of respondents' experience, capabilities, and references. Submissions will be reviewed and scored by a committee formed by the RJSCB. The committee may

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include members of the RJSCB, the City of Rochester, and the Rochester City School District. Results of the scoring will not be made public.

The Qualifications Review Committee will consider the following factors in assessing teams worthy of further consideration during the RFP process for this project:

- Program Management Experience
- K – 12 Educational Facility Program Management Experience
- Experience with New York State Educational Department
- Understanding of the Project
- References
- Experience meeting or exceeding M/WBE participation requirements

10. EQUAL OPPORTUNITY

The Rochester Joint Schools Construction Board (RJSCB) recognizes the need to take action to ensure that minority and women-owned business enterprises and minority and women employees and principals are given the opportunity to participate in the performance of contracts of the RJSCB. This opportunity for full participation in our free enterprise system by persons traditionally, socially and economically disadvantaged is essential to obtain social and economic equality. Accordingly, the RJSCB fosters and promotes the participation of such individuals and business firms in contracts with the RJSCB. The Program Manager will be expected to meet or exceed the requirements for M/WBE participation as set by the Rochester Joint Schools Construction Board.

Each individual/firm for this undertaking should acknowledge its understanding and support of the diversity policy herein stated and will be expected to demonstrate its efforts to solicit the participation of such individuals as partners, and/or employees. In this regard, the RJSCB expects the successful firm to undertake or continue the existing programs to ensure that minority group members and women are afforded equal employment and contract opportunities without discrimination.

11. CONDITIONS OF RFQ AND CONTRACTUAL INTENT

1. The issuance of the RFQ constitutes only an invitation to submit a Submission to the RJSCB. It is not to be construed as an official and customary invitation to bid, but as a means by which the RJSCB can facilitate the acquisition of information related to the purchase of services.
2. The RJSCB reserves the right to determine, in its sole and absolute discretion, whether any aspect of the Submission satisfactorily meets the criteria established in this RFQ, the right to seek clarification from any individuals or firm(s), the right to negotiate with any individuals/firm(s), the right to reject any or all submissions with or without cause, and the right to cancel and/or amend, in part or entirely, the RFQ.
3. In submitting a Response, it is understood by the individual/firm that the RJSCB reserves the right to accept any Submission, to reject any and all Submissions and to waive any irregularities or informalities that the RJSCB deems is in its best interest.

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4. In the event that this RFQ is withdrawn by the RJSCB for any reason, including but not limited to, the failure of any of those things or events set forth herein to occur, the RJSCB shall have no liability to any individual/firm(s) for any costs or expenses incurred in connection with this RFQ or otherwise. The RJSCB reserves the right to request additional data in support of the written Submission. The RJSCB is not obligated to respond to any Submission nor is it legally bound in any manner whatsoever by the receipt of a Submission.

12. RJSCB OWNERSHIP OF SUBMISSIONS

Upon receipt, all Submissions become the property of the RJSCB. The RJSCB reserves the right to use the information and any ideas presented in any Submission in response to the RFQ, whether or not the Submission is accepted.

13. REJECTION OF SUBMISSIONS

The RJSCB, in its sole discretion, may reject any Submission based on the format and Submission requirements, or based on any other requirement in this document. The RJSCB's right in rejecting or retaining any and all Submissions is broad and it is at the sole discretion of the RJSCB.

14. CANCELLATION OR AMENDMENT OF RFQ

The RJSCB reserves the right to cancel or amend this RFQ at any time and will notify all known RFQ recipients accordingly.

15. COSTS

The RJSCB shall not be responsible for any costs incurred by individuals/firms in connection with this RFQ. Individuals/firms shall bear all costs associated with Submission preparation, attendance at any related events, or any other activity associated with this RFQ or otherwise.