

## SELECTION PROCESS FOR CONSTRUCTION MANAGERS

October 20, 2020

### A. **APPOINTMENT**

Membership on the Selection Committee shall consist of the following positions:

1. Deputy Superintendent of Operations
2. Associate Superintendent of Finance
- \* 3. Director of the Department of Construction Services (Committee Chairman)
4. Director of Maintenance and Operations Department
5. Director of Food & Nutrition Services
- \* 6. Executive Planner, Planning Representative
7. Executive Director of Schools (Elementary/Secondary) as appropriate for the project
8. Director of Risk Management
9. Director of Purchasing
- \* 10. Proposed Project Director
11. School Principal (if the project is an existing school)
12. Other staff member(s) as may be assigned by the Committee Chairman for a particular project, to a maximum of eleven (11) Selection Committee members.
13. One (1) non-voting Board member will be invited to Architect and Construction Manager Interviews on a rotating basis. This will not preclude the Board member from voting on items related to the project(s).

The Committee Chairman shall maintain a list of Selection Committee members and the position they fill.

- \* The Department of Construction Services will have one (1) voting member on the committee.

### B. **QUORUM**

A quorum shall consist of five (5) members.

### C. **ALTERNATES**

Each member of the Selection Committee shall select an alternate staff member to serve in the member's absence, or that member may request that a staff member be assigned by the Committee Chairman. The Director of Construction Services shall maintain the list of alternates.

### D. **OFFICERS**

The Director of Construction Services shall schedule all meetings and serve as Chairman.

The Executive Planner shall serve as Vice Chairman and, in the Chairman's absence, shall schedule and chair the meetings.

**E. ATTENDANCE**

The assistant to the Director of Construction Services shall maintain an attendance log.

**F. SCORING AND RANKING**

All Selection Committee members shall score and rank the prospective professional service candidates as hereinafter provided.

**G. SELECTION PROCESS**

All Selection Committee members and alternates shall be thoroughly familiar with the Selection Process for Construction Managers.

This process is available on the Department of Construction Services page of the District's website at <https://www.manateeschools.net/constructionservices> under the Selection Process tab for all firms interested in submitting qualifications.

**H. EXHIBITS**

List of standard forms included in exhibits is as follows:

1. Exhibit A – Construction Manager Check List
2. Exhibit B – Construction Manager Request for Qualifications – RFQ #1
3. Exhibit C – Construction Manager Request for Qualifications – RFQ #2
  - a. To be used only for Joint Venture submittals

**I. MEETINGS**

Notice of all meetings shall be posted in Public Notices at [www.manateeschools.net](http://www.manateeschools.net).

**J. REVIEW**

The Department of Construction Services personnel will review all submittals received on or before the advertised time and date, to ensure the submitted package meets the requirements of the Check List. Submittals which include all required information shall be deemed qualified.

**K. SHORT LISTING**

The Committee Chairman will schedule a meeting with the Selection Committee and all qualified submittals will be reviewed.

In the event ten (10) or more qualified submittals are received in response to a given Request for Qualifications, the Selection Committee, after thorough review and discussion of all qualified submittals with regard to the designated criteria, may choose to eliminate one or more firms from further consideration and to designate the balance of the firms as

warranting further consideration. Any one committee member may designate a firm as warranting further consideration. Only the firms designated as warranting further consideration shall be scored and ranked, but in no event shall less than 50% of the qualified proposals be scored and ranked.

The Selection Committee reserves the right to combine Construction Manager (CM) interviews for related projects, or to use a single short list for multiple related projects.

1. The Construction Manager Short List Evaluation Criteria consists of items a – c with a maximum total of 100 points. The individual criteria are as follows:

a. References Maximum 10 Points  
Review references of individuals and projects.  
The District or its employees may not be used.

b. Workload and Available Staff Maximum 40 Points  
Discuss current overall workload as it affects available personnel for preconstruction, estimating, project administration and management, accounting, and purchasing.

c. Related Building Experience/Past Performance Maximum 50 Points  
Discuss related work for the School District of Manatee County, other school districts and similar types of construction completed.

- Current Workload with SDMC (10 points of the Maximum 50)  
Firms with the following aggregate dollar amounts with SDMC:
  - Less than \$3 million = 10 points
  - \$3 million to \$5 million = 8 points
  - \$5 million to \$7 million = 6 points
  - \$7 million to \$9 million = 4 points
  - More than \$9 million = 2 points

Maximum 100 Points

2. Each member of the Selection Committee is given an Evaluation Sheet and scores each firm designated as warranting further consideration according to the points indicated on the Evaluation Sheet. Upon completing the scoring of each firm, the numerical scoring is converted to an ordinal rank, i.e., the firm with the highest score is ranked 1<sup>st</sup> (1), the firm with the next highest score is ranked 2<sup>nd</sup> (2), and so on until all firms designated as warranting further consideration have received an ordinal rank. The Committee Chairman shall collect and tabulate the ranking results. The firm receiving the lowest total ordinal ranking will be ranked first. The results are then presented to the Selection Committee and they determine by vote how many firms are to be interviewed. A minimum of three firms must be interviewed unless fewer than three firms met the requirements of the checklist for the project. The assistant to the Director of Construction Services will issue a letter to each respondent, indicating the ranking of each firm and indicating which firms will be involved in the interview process.

Scores received in the Short Listing are not cumulative with the scores of the Interview Evaluation.

**L. INTERVIEW EVALUATION**

The Committee Chairman will schedule the interview date(s). The assistant to the Director of Construction Services will issue a letter to each of the firms selected for Interview Evaluation, confirming the date and time for their interview. The time schedules for each firm are selected by draw.

The shortlisted firms will be informed of the time allotted for each Interview Evaluation. This will be adjusted as appropriate from project to project. An example would be 15 minutes for presentation, 10 minutes for question & answer and 5 minutes for transition between firms.

1. The Construction Manager Interview Evaluation criteria consist of Items a – f with a maximum total of 100 (or 125) points. The items used for the CM Interview Evaluation are as follows:

- a. Knowledge of Site and Local Conditions Maximum 15 Points  
Discuss firm’s knowledge of Manatee County sites from any previous school board work, availability of labor, subcontractors and materials.
- b. Project Approach, Problems and Solutions Maximum 20 Points  
Discuss how your firm would approach the overall project and mesh activities with the owner, architect/engineer and departmental considerations.
- c. Scheduling, Cost Control and Value Engineering Maximum 30 Points  
Define your approach to project schedule, budgeting for all phases of the project, value engineering procedure and maintaining guaranteed maximum price and change orders.
- d. Direct Material Purchases, Insurance, Bonding Maximum 15 Points  
Discuss your knowledge of direct material purchase procedure, sales tax change order procedure, meeting insurance requirements, bonding and subcontractor bonding as required by the School Board of Manatee County Agreement with the construction manager.
- e. Proposed Site Staff Maximum 20 Points  
Identify your proposed site staffing and define the responsibilities of that site team. Discuss the support your office would give to the project.

Maximum 100 Points

f. Site Visitation

Maximum 25 Points

In the event a mandatory site visitation is made to examine a completed re-use facility, an existing facility or other special conditions, a maximum of 25 additional points shall be scored

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Maximum 125 Points  
(If Site Visit is required)

2. Evaluation Sheets, with each firm's name, previously used for the Short List, are distributed to each Selection Committee member. Presentations are followed by a question and answer period. After each interview, each member of the committee uses his own judgment, to rate the firm using appropriate points for each of the interview items. Scoring is converted to an ordinal ranking.

When all Interview Evaluations are complete, the Evaluation Sheets are completed, totaled and signed by each Selection Committee member and collected by the Committee Chairman, who tabulates the ranking results. Upon tabulation the ranking results are announced.

Each member of the Selection Committee scores each firm according to the points indicated on the Evaluation Sheet. Upon completing the scoring of each firm, the numerical scoring is converted to an ordinal rank, i.e., the firm with the highest score is ranked 1<sup>st</sup> (1), the firm with the next highest score is ranked 2<sup>nd</sup> (2), and so on until all firms scheduled for Interview Evaluation have received an ordinal rank. The Committee Chairman shall collect and tabulate the ranking results. The firm receiving the lowest total ordinal ranking will be ranked first. The results are then presented to the Selection Committee and they determine by vote the ranking to be submitted to the Board. Upon completion of the Interviews, the assistant to the Director of Construction Services will post the results electronically on the District's website [manateeschools.net/constructionservices](http://manateeschools.net/constructionservices), indicating the interview results, including the ranking, date and time.

The Committee Chairman will prepare for Board Approval the Authorization to Negotiate with the top ranked firm. Upon Board approval, the Department of Construction Services enters into negotiation with the highest ranked firm.

In the event successful negotiations cannot be accomplished with the first ranked firm, negotiations may then be held with the next ranked firm until satisfactory negotiations are completed.

**CONSTRUCTION MANAGER CHECK LIST**

The checklist is a short form list of requirements needed for the qualifications submission and it forms a table of contents for your proposal. This listing also serves as a checklist for the personnel who review your presentation for completeness prior to its review by the Selection Committee.

Applicant	DCS Staff	Requirements
		1. Letter of interest stating what project is being applied for. (Continuing Contracts or a Specific Project).
		2. Completed Request for Qualification - RFQ #1. In the event a Joint Venture is proposed, each member of that Joint Venture shall complete a RFQ #1 and a RFQ #2, detailing the Joint Venture.
		3. Resumes of key personnel.
		4. State of Florida, corporate and professional, registration certificates.
		5. List of five (5) client references including name, title, phone number and project information. The District or its employees may not be used.
		6. A listing of school work experience.
		7. Current volume of work and number of projects.
		8. Submission of other corporate data (pictures, brochures, letters).

The completion of items #1 through #7 are mandatory. Failure to complete items #1 through #7 may deem your submittal incomplete and eliminate it from further consideration.

Item # 8 is optional and is not a requirement under this submittal process.

**EXHIBIT B**

**CONSTRUCTION MANAGER REQUEST FOR QUALIFICATION – RFQ #1**

Date of Advertisement \_\_\_\_\_ Project \_\_\_\_\_

1. Name and Address:

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

2. Date Firm Established: \_\_\_\_\_ Date Firm Incorporated: \_\_\_\_\_

3. Date Prepared: \_\_\_\_\_

4. Principals:	Title:	Telephone Number:
_____	_____	_____
_____	_____	_____
_____	_____	_____

5. Bonding Capacity: \_\_\_\_\_

Bonding Agent/Firm: \_\_\_\_\_

*Attach letter of bonding capacity.*

6. Insurance:

*Attach proof of general, workers' compensation and professional liability insurance.*

7. Litigation:

*Attach a list of all pending litigation and all litigation with the past five years, including explanation of each. (per SREF 4.1(1)(c)7)*

8. Gross Volume for Last Five Years, per Index Below: (indicate A – F for each year)

\_\_\_\_\_ 2020      \_\_\_\_\_ 2019      \_\_\_\_\_ 2018      \_\_\_\_\_ 2017      \_\_\_\_\_ 2016

Index:

Less than \$1,000,000	A.	\$10,000,000 to \$20,000,000	D.
\$ 1,000,000 to \$5,000,000	B.	\$20,000,000 to \$50,000,000	E.
\$ 5,000,000 to \$10,000,000	C.	\$50,000,000 or greater	F.

9. Examples of Projects from Last Five (5) Years: (List School Related Projects First)

a. Name & Location	b. Owner/Rep Name, Address & Phone	c. Cost	d. Year
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

**Additional projects from last 5 years may be listed as an attachment placed after this page.**

I hereby attest to the completeness and correctness of the application and financial information.

\_\_\_\_\_  
Signature of Authorized Officer

\_\_\_\_\_  
Printed Name



**EXHIBIT C**

**CONSTRUCTION MANAGER REQUEST FOR QUALIFICATION –RFO #2**

(For Joint Venture Submittals Only)

1. Project Name & Location:

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2. Date of Advertisement: \_\_\_\_\_

3. Joint Venture Name & Address: \_\_\_\_\_

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4. Point of Contact:

Name	Title	Telephone Number

5. Address of Responsible Office: \_\_\_\_\_

6. Number of Personnel by Discipline for Joint Venture:

A=Consultant Personnel    B=In House Personnel

A	B	Accounting	A	B	Mining Engineers
A	B	Administrative	A	B	Oceanographers
A	B	Architects	A	B	Planners: Urban/Regional
A	B	Chemical Engineers	A	B	Project Engineers
A	B	Civil Engineers	A	B	Project Manager
A	B	Construction Inspectors	A	B	Sanitary Engineers
A	B	Draftsmen	A	B	Soils Engineers
A	B	Ecologists	A	B	Specification Writers
A	B	Economists	A	B	Structural Engineers
A	B	Electrical Engineers	A	B	Superintendents
A	B	Estimators	A	B	Surveyors
A	B	Foreman	A	B	Transportation Engineers
A	B	Geologists	A	B	
A	B	Hydrologists	A	B	
A	B	Interior Designers	A	B	
A	B	Landscape Architects	A	B	
A	B	Mechanical Engineers	A	B	

7. Outline Specific Areas of Responsibilities for each firm including Administrative, Technical and Financial:

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8. Previous Joint Venture?      Yes       No

9. Completed Form #1 for Each Firm?       Yes      Attached?      Yes

10. List Below Previous Joint Ventures that included the same main entities:

Project Owner Name, Address & Phone  
Year

Project Description

1.		
2.		
3.		
4.		
5.		
6.		
7.		