



Request for Qualifications (RFQ)
For
Capital Project Management Services

Statements of Qualifications Due:

Thursday, November 30, 2023

Lake County Public Services Department
333 Second Street
Lakeport, CA 95453

A. INTRODUCTION

The Lake County Public Services Department (LCPSD) is requesting proposals for professional consulting services to support the execution of capital projects. This request is for Project Manager/Owner's Representative (PM) services to function as adjunct staff to supplement LCPSD staff.

The general scope of work will include:

- 1) Provide resources and act as project manager and owner's representative for projects, or bundles of projects, where County determines that additional project management support is required.
- 2) Be the advocate and advisor for County to coordinate activities of the project team, manage project costs, identify and mitigate risks, accelerate project delivery and optimize value for County.
- 3) Support all phases of project execution – including planning, design, construction, and close-out.
- 4) Work closely with the County project team and facility occupant (as applicable) to coordinate bidding, contracting, design and construction activities, manage relationships, seek efficiency in all phases of the project, provide reports, and monitor/assure contractor compliance.

B. BACKGROUND

The LCPSD is responsible for managing the County's Facilities Capital Improvement Plan (FCIP). The FY 2023-24 through FY 2027-28 FCIP (see Attachment A) includes approximately 100 capital projects with estimated project costs nearing \$100 million. The LCPSD does not have sufficient internal staff resources to manage the current load of capital projects. Consequently, this RFQ seeks external resources to supplement current staff in support of capital project delivery.

C. SCOPE OF WORK

The County wishes to retain the services of a single consultant to provide professional services over a three-year period, with the potential to extend in one-year increments a fourth and fifth year if mutually agreeable to both parties. The County intends to enter into a General Services Agreement (GSA) with the consultant selected through this RFQ. The GSA will include the general provisions for the contractual agreement between the County and the consultant. Subsequent supplemental service agreements will be executed that describe the specific scope of services to be completed by the consultant.

The successful Consultant is expected to provide services in accordance with the draft General Services Agreement (see Attachment B) along with the following types of services:

1) GENERAL REQUIREMENTS

- a. The Consultant selected for this program shall assign a Program Manager to manage and administer the required services and staff. This Program Manager shall consult with the designated County representatives, monitor staff progress and work quality, and address any issues that arise within the Consultant project team.
- b. Prior to initiation of work, the selected Program Manager shall confirm with LCPSD the general scope and intent, timetable, points of contact and deliverables for each Project. The Program Manager is not expected to be involved in day-to-day activities but should be familiar enough with the program to provide support on an as-needed basis as well as providing a single point of contact and contract oversight for the Consultant.
- c. Level of project management services will vary between projects. Prior to initiation of work, the scope of Project Management services shall be jointly determined by LCPSD and Program Manager.
- d. Each project requires its own separate accounting, and Consultant invoices shall itemize costs by project.

2) PLANNING

- a. Work with LCPSD to develop a complete understanding of the project assignment, including identification of the project Client and the project delivery method/contracting strategy (which may include traditional design-bid-build, design-build, or other methods).
- b. Attend meetings with LCPSD and the project Client to develop a mutual understanding of the assigned project, identify roles and responsibilities, and develop working protocols and standards for the execution of the project.
- c. Complete the development of project goals and objectives, including financial objectives and controls, schedule, records and reporting.

3) DESIGN

- a. As needed, develop design consultant's scopes of work; prepare requests for proposals for professional services; assist in the preparation of contracts for the retention of such professionals; review/negotiate, with County, scope and fee revisions with professionals, which may include:
 - i. Architect and Engineers
 - ii. Contractor(s)
 - iii. Specialty consultants and contractors
- b. Verify that the milestone schedule requirements and other known and reasonably foreseeable steps necessary to perform and complete the project have been included and/or accounted for within the contract documents.
- c. Develop a strategy, procedure, and schedule to assist County in obtaining the required reviews and approvals of authorities having jurisdiction over the Project; and assist the County in connection with filing documents required for such approvals.

- d. Preparation of construction estimates for the conceptual design, schematic design, design development, contract document phase, individual bid packages and proposed Change Orders.
- e. Prepare cost estimates for County's costs (including professional services, fees, technology, FF&E and move costs).
- f. As needed, develop a capital cost estimate to support Client department requests that may be part of the annual County budget process in the form and format required by County.
- g. Work with Designer to develop Program and Conceptual Design.
- h. Review the plans, drawings, specifications and such other documents as prepared by the professionals for cost, constructability, adherence to schedule and consistency with the program.
- i. Participate in value engineering exercises and evaluate proposed building design systems as to quality, first cost and life cycle cost, constructability, union jurisdiction, and availability.
- j. Coordinate approvals and communication issues between state and local agencies to obtain any required permits, licenses and other approvals for the project.
- k. Schedule and attend all design review meetings and review the design professional's agenda and minutes for accuracy and correct any errors within such documents.
- l. Conduct design plan quality review at each stage of design development (Schematic Design, Design Development, and Construction Drawings).
- m. Review applications for payment from County's consultants, designers and engineers and provide recommendations to County for approval/revision/rejection.

4) CONSTRUCTION

- a. Establish bidding schedules, develop and/or assemble construction bidding documents, and assist the County with the issuance of construction bid packages.
- b. Coordinate and conduct, with the assistance of County and design team, pre-bid conferences with prospective bidders. Assist the County and design team with regards to questions from bidders and issuance of addenda.
- c. Assist the County in the receipt and evaluation of bids. Prepare bid analysis as needed.
- d. Schedule and conduct and/or attend pre-construction, construction and progress meetings to discuss matters of procedures, progress, problems and scheduling of the construction phase of the project.
- e. Develop and maintain project files to include a record copy of all contracts, drawings, specifications, addenda, change orders and drawing modifications, shop drawings, product data and samples, handbooks, manuals and instructions and related materials for County's FF&E.
- f. Review accuracy of all invoices for County's FF&E and other items, and provide recommendations to County for approval/revision/rejection.

- g. Recommend to the County necessary or desirable changes to the project; review requests for changes by design professionals, construction manager, specialty contractors and consultants, and equipment vendors; assist in negotiating proposals; determine whether changes are necessary, reasonable and accurate; and submit recommendations to the County for approval.
- h. Review applications for progress payments and final payments, and all documents in support of such applications and make the appropriate recommendations to the County.
- i. Assist in obtaining required governmental and regulatory agency permits or approvals, fee waivers (if applicable), and resolving code or regulatory disputes required for the work.
- j. Monitor and confirm that the design professionals and construction manager maintain the following documents: a record copy of all contracts, drawings, specifications, addenda, change orders and drawing modifications, shop drawings, product data and samples, handbooks, manuals and instructions and related materials required to be kept and maintained for the project.
- k. Assist in coordinating all aspects of the work with any public agencies or utility companies involved in the project.
- l. Monitor and review the design professionals' and the Developer/Contractor's quality inspection control system so that the required standards of construction are achieved.
- m. Monitor the design professionals' and the Developer/Contractor's review of all testing required by the technical sections of the specifications and applicable codes and regulations for compliance with the contract documents.
- n. Monitor all scope changes during construction to ensure compliance with approved revisions.

5) CLOSE-OUT

- a. Conduct a comprehensive final inspection of the project to verify that the materials furnished and work performed are in accordance with the contract documents.
- b. Receive from the contractor and deliver to the County all guarantees, warranties, operating and maintenance manuals required by the contract documents.
- c. Monitor the design professionals' and contractors' procedures for expediting the preparation of "as-built" and record drawings and operations and maintenance manuals in accordance with the specifications.
- d. Review applications for final payments, and all documents in support of such applications and make the appropriate recommendations to the County.
- e. Provide a detailed and comprehensive final account report to include recommendation for acceptance of work.