

REQUEST FOR QUALIFICATIONS (RFQ)

**PROGRAM MANAGEMENT SERVICES
FOR THE PNGISD 2007 BOND PROGRAM**

Due Date: July 24, 2007 at 2 p.m.

NOTICE TO PROPOSERS:

Sealed qualifications are invited by the Port Neches-Groves Independent School District.

Sealed qualifications will not be read in public and will be “under evaluation,” until final selection is determined. Results will become available seven business days after approval by the Board of Trustees.

Please submit qualifications and supporting data in a sealed opaque envelope addressed as follows:

Cheryl Hernandez, Business Manager
Port Neches-Groves ISD
620 Avenue C
Port Neches, TX 77651

ATTN: Program Management Services

Due no later than **July 24, 2007**

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Notice to Vendors

District Contact for Questions

Cheryl Hernandez, Business Manager 409.722.4244 ext. 1711
Port Neches-Groves ISD
620 Avenue C
Port neches, TX 77651

Due Date July 24, 2007

Fees

This Request for Qualifications does not ask for fee information. Upon selection, PNGISD will meet with the selected firm to negotiate a fee arrangement for services in accordance with Texas Education Code 44.037.

Anticipated Schedule of Events

- Request for qualifications issued
- Qualifications due (by 2:00 PM)
- Notification to short-listed firms
- School Board approval (tentative)

Selection Criteria

The firms will be selected based upon a two-part evaluation. The first part will include the written submission of qualifications, weighted at 50%. The elements of this review will include:

- Proposing firm's overall financial strength and qualifications for program administrator services
- Resources and the strength of the proposed team
- Experience in K-12 program management based upon the firm's experience and the submitted resumes associated with that experience
- Proposed schedule for program delivery
- Overall Form and Format of Submission (including ability to be concise and brief)

The second part will include an oral presentation and this interview portion will account for 50% of the selection criteria score and will include:

- Delivery of Management Plan
- Participation of key staff that will complete the scope of work
- Technical competence and expertise in program management for similar size districts
- Firm differentiators and understanding of project issues
- Verbal and graphic presentation skills
- Question and answer participation

The district reserves the right to negotiate terms and conditions including scope, staffing levels, and fees, with the highest ranked responder. If agreement cannot be reached with the highest ranked responder, the district reserves the right to negotiate with the next highest ranked responder and so on until agreement is reached. When agreement is reached the district will submit its recommendation to the School Board for approval and award of contract.

Submittal Instructions

Please submit 15 copies no later than 2:00 p.m. on **July 24, 2007** to the attention of:

Cheryl Hernandez, Business Manager
Port Neches-Groves ISD
620 Avenue C
Port Neches, TX 77651

Telephone, electronic or facsimile submissions will not be considered. Submissions received after the time and date of closing will not be considered. This RFQ in no manner obligates the district to eventual purchase of any services, products or equipment described, implied, or which may be proposed, until confirmed by written contract. Progress towards this end is solely at the discretion of the district and may be terminated without penalty or obligation at any time prior to the signing of a contract. The district reserves the right to cancel this RFQ at any time for any reason and to reject any or all submissions in whole or in part. PNGISD will not be liable for any costs incurred by firms in preparation of these requested qualifications or in answering the Request for Qualifications.

The Request For Qualifications contains specific requests for information. In those cases where specific and mandatory requirements are stated, material failure to meet those requirements will result in disqualification of the firm's response.

This organization will allow the district to maximize the use of trained design and construction experts. The PNGISD staff will provide the school related expertise and will draw upon the resources of a firm specializing in construction management to apply the appropriate expertise to the design and construction process to achieve projects that are on time, under budget and which meet the district's facility needs. This type organization will allow efficient and effective use of district and non-district personnel expertise that are trained in design and construction while not requiring everyone to have extensive school related experience.

Anti-Lobbying Provision

All firms responding to this RFQ are strictly prohibited from retaining the services of Lobbyist to act on behalf of the respondent and shall refrain from similar activities within the employment of the firm. Any such action shall constitute grounds for immediate disqualification from consideration by the PNGISD. Additionally, all questions regarding this solicitation shall be directed to the parties identified herein. Consultants are specifically prohibited from contacting any PNGISD administrators or trustees other than the contacts listed in this RFQ. If a consultant is determined to be in violation of this policy, this too shall constitute grounds for immediate disqualification from consideration by the PNGISD.

Insurance and Taxes

Insurance

The Program Manager shall not commence work under this contract until all insurance described below has been obtained, and such insurance and all certificates evidencing existence of such insurance have been approved by the district.

The Program Manager shall procure and shall maintain during the life of the agreement, Worker's Compensation insurance for all of its employees and subcontractors to be engaged in work under this contract. Worker's Compensation insurance must include Texas activities. Limit of Worker's Compensation shall be statutory and limits of employers' legal liability shall be at least \$100,000 per occurrence.

The Program Manager shall procure and shall maintain during the life of the agreement, such Commercial General Liability insurance as shall protect it from claims for damages for Bodily operations under the agreement. The amount of insurance shall not be less than the following:

Required Insurance Coverage

Comprehensive General Liability	\$100,000 each person
Bodily Injury Liability	\$300,000 each occurrence
Property Damage Liability	\$ 50,000 each occurrence
Workmen's Compensation	\$100,000 each person
Comprehensive Automobile Liability	\$100,000 each person
Bodily Injury Liability	\$300,000 each occurrence
Property Damage Liability	\$ 25,000 each occurrence

Certificates of Insurance

Certificates acceptable to the district shall be attached to the signed agreement when it is transmitted to the district for execution. These certificates shall contain the statement that:

Coverage's afforded under these policies will not be canceled, changed (which includes renewal), allowed to lapse or expire until the district has received thirty (30) days written notice addressed as follows:

Attn.: Cheryl Hernandez, Business Manager
Port Neches-Groves ISD
620 Avenue C
Port Neches, TX 77651

and be evidenced by certified mail, return receipt requested, or until such time as other valid and effective insurance coverage acceptable in every respect to the district is put in place. Additional coverage information must be made upon request to verify full compliance with insurance requirements.

Waiver of Subrogation

PNGISD shall be provided a written waiver of subrogation on all required insurance coverage's. This shall be evidenced either by signed policy endorsement, or so indicated on the submitted insurance certificate.

PNGISD shall be listed as an additional insured on all required coverage, except workers' compensation, for all activities arising out of this agreement. These policies shall also be primary over any other valid and collectable coverage, which may exist. This shall be evidenced either by signed policy endorsement, or so indicated on the submitted insurance certificate.

Hold Harmless Agreement

The Program Manager hereby agrees to indemnify and save harmless Port Neches-Groves Independent School District from and against any and all claims, demands, damages, lawsuits, expenses, costs, liabilities, injuries, liens and causes of action of any and every nature whatsoever, arising out of, resulting from, or in any manner connected with or concerning the performance of the work hereunder, and the Program Manager hereby agrees to defend any and all such actions brought against the Port Neches-Groves Independent School District for any and all expenditures, or expenses, including, but not limited to, court costs and attorney's fees, made or incurred by the Port Neches -Groves Independent School District, and/or by reason of any such suit or suits.

Taxes

The Program Manager shall be responsible for paying all applicable taxes and fees, including but not limited to, excise tax, state and local income tax, payroll and withholding taxes for contractor employees; the contract shall hold the district harmless for all claims arising from payment of such taxes and fees.

Project Overview

The 2007 PNGISD Bond Program (attached as Appendix A), totaling \$123 million was presented to the district voters for approval and passed on May 12, 2007. The program includes construction of new two new Middle schools, minor renovations to all existing elementary campuses and major renovation and construction to the high school and athletic facilities, and 24 new school buses. A portion of \$123 million was designated for items other than construction and renovations and therefore will not be subject to the services of the Program Manager.

The Port Neches-Groves Independent School District (PNGISD) intends to select a Program Manager to perform Program management (“PM”) services to assist in the implementation and management of portions of the PNGISD 2007 Bond program. The selected applicant will join a Project Team which will include PNGISD administration, architects, engineers, designers, planners and construction contractors, all of whom will be engaged in a cooperative effort to provide PNGISD with successful and cost effective solutions.

PNGISD currently has a facilities staff consisting of the Director of Facilities Management & Maintenance. Due to the magnitude of this program, PNGISD is considering the use of a Program Management firm to work with the district and architect/engineer during the design phases, and to provide the services generally described below during construction activities. The district will hold all contracts, and is seeking a relationship with the Program Management firm as defined by Texas Agency Law for principal and agent.

The services included in the Program Management contract may include overall management services, request for qualifications, requests for proposal, development of scopes of work, construction standards, scheduling and estimating, bidding and negotiations, design review (with regard to costs, schedule and constructability), quality assurance, construction management, on site inspection, contractor pay applications, construction close out, move and relocation coordination including temporary housing, overall contract management, and community relations. During contract negotiations the District will determine which of these services will be used and included in the contract. This district is open to alternative delivery strategies if they result in a higher quality product, a more streamlined design and construction process, and increased value to the district.

Scope of Work

The selected Program Management firm will be responsible for a portion of the program and the district's objectives for the program include innovative, yet proven processes that will result in a high quality educational product, with the highest level of public accountability, and the highest and best use of taxpayer funds. While the following tasks represent the majority of the management activities anticipated, this is in no means a comprehensive list of services. The district is looking for firms that have solutions for these services that meet the district's objectives, as well as other ideas and recommendations that could improve the program. The district will evaluate firms on their ability to provide the following services and also on their unique ideas for improving program quality, reducing schedules and identifying cost savings opportunities.

Development of Scopes of Work and Budgets

Development of Contracts / RFPs

Resource Loaded Scheduling and Estimating

Bidding, Evaluations and Negotiations

Management / Coordination of Design Teams and Design Review

Cost Verification / Estimating

Value Engineering as required

Coordinate / Track Agency Approvals

Quality Assurance / Deficiency Resolution

Construction Management

On Site Inspection / Documentation

Payment Approvals / All Bond Funds

Construction and Contract Close Out

Move and Relocation Coordination

Overall Contract and Document Management

Post Occupancy Evaluation / Warranty Tracking

Community and School Relations

The program Manager shall provide a full-time, on-site Program Management team, with appropriate administrative support during the entirety of the program. Membership of this team shall be stable, and any proposed personnel changes must be approved in advance by the Owner Representative.

External Communication

The Program Manger shall, as directed by the Owner Representative, make presentations to and answer questions from project stakeholders including the cities of Port Neches and Groves and the State of Texas. The Program Manager shall design, establish and maintain a PNGISD Bond Program web site for informing the public on project specific progress/status. The Owner Representative shall approve of the design and information before it is made available to the public.

Internal Communication

The Program Manager shall put in place a system of daily and weekly updates and reporting to the Owner Representative. The purpose of this protocol is to keep the Owner Representative abreast of the constructional program, particularly involving issues requiring his/her immediate attention.

For all construction-related meetings, the Program Manager will prepare and distribute meeting notes (minutes) and ensure coordination of issues raised during the meetings with responsible project stakeholders. Meeting notes (minutes) will be issued to all parties concerned no later than three working days following the date of the meeting.

The Program Manager shall prepare a monthly Project Report in a single volume to include the following information for each project: Executive Summary Narrative; Executive Summary Cost Report; Master Schedule; Summary of Owner Occupied Space and Scheduling of Intermittent Moves of Existing Functions; Summary of Equipment Planning and Procurement. The Project Specific Report shall include a Summary Report and Progress Report; and the presentation of post-construction maintenance schedules and procedures. The Program Manager shall participate in update meetings with District as directed by the Owner Representative.

Change Control

The Program Manager will establish and maintain a project Change Control System that will provide for the management, tracking, and documentation of all changes to the project. The design of the Change Control System must be approved by the Owner Representative, and will be changed, if necessary, at the discretion of the Owner Representative.

The Program Manger will review, analyze, and make recommendations regarding cost, schedule, and quality impacts of all changes in scope submitted for consideration by the Owner. The Program Manger will analyze and negotiate both the scope and costs of all changes for Owner Representative approval, and on a monthly basis, will report to the Owner Representative on the impact of all changes on project cost, schedule, and quality.

Submission Requirements

Please include the following in your submission: (Categories and associated page counts will be strictly enforced. Any deviation will be grounds for disqualification.)

1. **Cover Letter.** Provide a one-page cover letter introducing the firm and any other pertinent information concerning the firm's specific qualifications for the PNGISD project.
2. **Firm Description.** Provide firm name, address, contact, and number of years providing program management services, specifically for K-12 clients. If the submitting firm anticipates the use of sub-consultants, joint venture partners, or any other operating structure, please provide a detailed description of that company structure, the relationship with any sub-consultants, and whether these firms have worked together in the past. Limit to 3 pages.

All submitting firms must identify the location of any parent office(s), and the location of the office that will be principally responsible for the project. For the office responsible, including those of major sub-consultants, associates, or JV partners, please provide:

- a. Total number of office staff,
- b. Breakdown of professional staff and support staff
- c. Staff numbers and types that are involved in program management services.
- d. For the past five years, the approximate total gross revenues attributed to that office, approximate allocation of gross revenues to program management services, and the portion specifically allocated to K12 education clients.

Limit this information to 2 pages.

3. **Project Team.** Include an organizational chart that depicts reporting responsibilities and organization of team members. This chart must specifically identify the program manager, and up the key individuals responsible for major disciplines and support areas. Describe the relationship the firm's key staff will have with PNGISD. Limit to ten pages.
For each team member proposed, provide the following information:

- a. Resume with an overview of roles and responsibilities on the project, as well as degrees held, registrations, memberships, and years with the firm.
- b. Current principal place of residence and a statement of willingness to relocate to Port Neches or Groves, Texas if required by proposing firm.
- c. List of personnel experience specifically in the K-12 educational market.
- d. Involvement, if any, in terms of roles and responsibilities on the firm's experience described in Section 4, Project Experience.
- e. Organizational Chart indicating all personnel assigned to the project and whether full time or part time involvement on the Management Team.

4. **Program Manager Scope of Work** – Review the list of services outlined in the previous section of the RFQ. Identify those and/or other services you believe are appropriate for PNGISD's bond program, and describe in detail the scope of each service you propose to provide. Describe the responsibility your firm (versus PNGISD, the architect/engineer or contractor) will assume for the successful realization of the services you propose.

5. **References** – Identify all Texas public school districts for which you have provided (within the last 5 years) or are currently providing comparable project management services. For each district, provide the following:
 - a. The name of the district, the scope of the work being managed in terms of numbers of projects and total cost, and the status of the work.
 - b. The name, position, phone number and email address of the individual at the school district to whom the Project Manager reported.
 - c. The name of the architect(s) responsible for major projects in each program being managed. Provide the name, phone number and email address for a contact with each architectural firm.

Port Neches-Groves INDEPENDENT SCHOOL DISTRICT

VENDOR INFORMATION / NOTICE OF NO-SUBMISSION

TYPE OF PROCUREMENT: REQUEST FOR QUALIFICATIONS NO. _____ TITLE: PROGRAM MANAGEMENT SERVICES. OFFERS WILL BE ACCEPTED UNTIL: _____ ON _____ AT THE ADMINISTRATION BUILDING, BUSINESS DEPARTMENT, ATTN: CHERYL HERNANDEZ, AT WHICH TIME THEY WILL BE PUBLICLY OPENED. OFFERS MAY NOT BE WITHDRAWN AFTER OPENING. PROCUREMENT RESULTS WILL BECOME AVAILABLE SEVEN BUSINESS DAYS AFTER APPROVAL BY THE BOARD OF TRUSTEES.

Vendor Offers (original and six copies – please mark copies “COPY”) must be in a sealed opaque envelope, plainly marked on the outside with SOLICITATION NAME, SOLICITATION NUMBER, AND DATE. Faxed proposals will NOT be accepted. Offer received after the specified time shall not be considered. Late mail deliveries will be held unopened. U.S. Mail is not delivered to the District until after 11:00 a.m. daily.

PLEASE TYPE OR PRINT VENDOR IDENTIFICATION DATA

LEGAL NAME OF VENDOR: _____

MAILING ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE: _____ PHONE # _____ FAX # _____

NAME OF AUTHORIZED REPRESENTATIVE: _____ TITLE: _____

COMPANY WEBSITE ADDRESS: _____ REPRESENTATIVE E-MAIL ADDRESS _____

CITY: _____ STATE: _____ ZIP CODE: _____ PHONE # _____ FAX # _____

TYPE OF BUSINESS (CHECK ALL THAT COMPLY): Manufacturing, Distributor, Wholesale, Broker, Retail,
 Service, Franchise, Construction, Other: _____

NOTICE OF NO SUBMISSION – If you are unable to submit an offer, please return this form with the applicable response box checked, on or before the closing date.

<input type="checkbox"/> I do not wish to submit a Bid for this procurement, however, please retain my name on the vendor list for this item	
<input type="checkbox"/> I do not wish to submit a Bid for this procurement, please remove my name from the vendor's list for this commodity.	
<input type="checkbox"/> The products/services we represent should be listed in another category. Please move to another list as specified:	

VENDOR CERTIFICATION AND IDENTIFICATION

I certify that I have carefully examined the Invitation for Proposal, Specifications and Conditions, General Conditions, Certifications and Price Sheets and attachments. I agree to furnish supplies and/or services in strict compliance with the specifications and conditions contained in this document. I freely submit this offer and have not colluded with other parties to fix prices, or in any other manner, undermine the competitive procurement practice.

SIGNATURE OF AUTHORIZED REPRESENTATIVE: _____ **DATE:** _____

**APPENDIX A
(see attached)**

Summary of Costs

▪ Elementary Schools	\$5,373,944
▪ Middle Schools	\$56,868,232
▪ High School	\$45,989,970
▪ Other Facilities	\$11,149,051
▪ Buses	\$2,703,171
▪ Bond Sale Fees	\$915,633
Bond Election Total	\$123M

		Port Neches Groves Independent School District																								
		2007 Bond - Project(s) Schedule																								
		2008												2009						2010		"S U M M E R"				
		Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Apr	May	Jun	Jul	Aug
		12/31	1/28	2/25	3/31	4/28	6/2	6/30	7/28	9/1	9/29	10/27	12/1	12/29	2/2	3/2	3/30	4/27	6/1	6/29	7/27					
		Bd Mtgs: 2/19 TAKS Spr. Brk--> Mar 10-14 Apr 22-25 <--TAKS *4/18																								
1)	HS Stadium																									
	Construction Cost																									
	\$9,005,623																									
	Arch Fee																									
0.06	\$540,337																									
		Occupation of Space (2 weeks) SC = 7/25/08																								
		Opening - Fall Semester 2008																								
2)	Groves MS																									
	Construction Cost																									
New	\$21,907,596																									
Demo (.77)	\$386,648																									
	\$22,294,244																									
	Arch Fee																									
0.06	\$1,337,655																									
3)	Port Neches MS																									
	Construction Cost																									
New	\$20,717,827																									
Demo (.77)	\$20,717,827																									
	Arch Fee																									
0.06	\$1,243,070																									
		Mon (2/4) * 2/11-2/22 wings (Mon 2/25) * Week Proposal Period Proposals Date (Tue 3/18) * Evaluation (3/19 - 4/1) Board Package Due (4/27) * BOARD APPROVAL - GMP (4/18?) * Notice to Proceed Construction Period (Approx 13 Months) Occupation of Space (3 weeks) SC = 5/15/08 Demo Existing MS (6/13 - 6/20) Complete Site Work Opening - Fall Semester 2009																								
4)	PNG HS + Athletics																									
	Construction Cost																									
New	\$34,495,460																									
Demo (.77)	\$1,120,000																									
	\$35,615,460																									
	Arch Fee																									
0.06	\$2,136,928																									
		(Tues 2/5) * 2/11-2/22 wings (Mon 2/25) * Week Proposal Period Proposals Date (Tue 3/18) * Evaluation (3/19 - 4/1) Board Package Due (4/27) * BOARD APPROVAL - GMP (4/18?) * Notice to Proceed Construction Period (Approx 28 Months) Occupation of Space (6 weeks) SC = 6/15/10 Opening - Fall Semester 2010																								