

DEPARTMENT OF ADMINISTRATIVE SERVICES

Milwaukee County



August 5, 2015

To All Interested Consultants

Project: *Zoo West Entrance Complex & Otter Exhibit*

Project No.: *Z150-4453 & Z150-4455*

Subject: *CM Services Request for Proposals (R.F.P.)*

Milwaukee County Department of Administrative Services and Milwaukee County Zoo are requesting proposals for professional consulting services to provide *construction management (hereafter called "CM") services* necessary to oversee the construction of the *West Entrance Complex and Otter Exhibit at Milwaukee County Zoological Gardens*, hereafter called the "Project", located at 10001 W. Bluemound Road, Milwaukee, Wisconsin.

I. BACKGROUND

- Location: Milwaukee County Zoological Gardens new West side expansion
- History: Due to the loss of land of the Zoological Gardens to the I-94 Zoo Interchange Reconstruction project, A new parking lot along with a new entrance complex and an outdoor otter exhibit are required to mitigate the impacts of the loss of land. The parking lot, excluding the finish asphalt pavement, is under construction at the release of this RFP. The new entrance complex, the otter exhibit and the finish asphalt pavement on the parking lot as well as landscape construction will begin construction in September 2015.
- Ownership/Departmental jurisdiction: The land being developed and the future buildings on it are properties of the Zoological Gardens, which is also the project owner.
- Adopted budget item reference: Funding for the project was acquired through the cost to cure compensation program from the Wisconsin Dept. of Transportation (WisDOT). However, the initial fund provided by the compensation program was proofed to be insufficient while the design was being developed. Additional funds are being sought from WisDOT. As a result, the project is being executed under a phased funding structure which affects its execution and completion approaches.

II. GENERAL PROJECT DESCRIPTION

- Scope of Construction: Construction includes the entrance complex consisting of a plaza, an

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admissions pavilion, a retail-coffee shop-restroom building, an otter exhibit consisting of an outdoor yard, an indoor holding facility and a viewing shelter, and the completion of the parking lot beginning with completed items from prior construction and entailing installation of the finish asphalt pavement and landscape materials.

- Design Consultants DESIGN CONSULTANT): The Design Consultant (DESIGN CONSULTANT) is a team led by PGAV Destinations of St Louis MO, and includes IBC Engineering, KSA, Sigma and James Otto Architect who will be the construction phase design representative. The County also contracts with Gestra for geotechnical and material testing services, and utilizes zoological gardens staff for landscape design, a surveyor will also be contracted by the County if necessary. At project close out the County will contract with other agent(s) for building system testing and balancing.
- Construction Documents (CD): CD's for the entrance complex and otter exhibit are at 90% completion at release of this RFP. CD's for the parking lot were previously released for bidding and construction. The 90% CD set and a revised grading plan of the parking lot project are attached to this RFP. A bid set for the entrance complex and otter exhibit will be released by the Design Consultant in mid-August, 2015.
- Contractor for Parking lot prior work (to binder course paving): Wilkomm Excavation with paving by Stark Asphalt.
- Anticipated Construction Time Frame: For phase 1 funded items, from September 2015 to June 2016. For phase 2 funded items, from September 2015 to a yet to be determined completion date.
- Anticipated Construction Phasing: Due to the phased funding structure, a phased construction process is necessary. Formulating and executing construction phasing is a part of the CM Services being sought,
- Anticipated Contracting Approach: Due to phased construction described above, there will be multiple contracting packages involving multiple biddings administered separately. However, the bid set CD will be released in its entirety at one time without distinguishing separate bid packages. Organizing bid packages, defining their respective scopes, referencing the scope of each package to the relevant information in the bid set CD, and managing all biddings are a part of the CM Services being sought.
- Overall Project administration: The project is jointly administered by Milwaukee County DAS-A/E, and, the Zoological Gardens. The project manager (PM) overseeing both design as well as construction is Philip Hung, Milwaukee County DAS-AE Managing Architect.

III. SCOPE OF CM CONSULTANT SERVICES

The successful consultant shall provide all services as specified per the standard terms and conditions of the Milwaukee County Department of Administrative Services Consultant Agreement for Professional Services Type C. (A sample contract is attached to this RFP).

III-A OVERALL CONSTRUCTION MANAGEMENT SERVICE

The CM shall be responsible for overall management of construction of the Project, encompassing all phases and contracting packages from bidding to construction completion. Work shall include and is not necessarily limited to the following:

1. *Thorough oversight of all work shown in the CD: The CM shall become thoroughly familiar with all work shown in the CD, including the organization of information and cross references; shall attain a complete knowledge of the quality of construction to be accomplished as stipulated in the CD; shall develop a complete understanding of the logical sequence of execution of all items; and shall oversee the prosecution of the entire work accordingly.*

2. *Sequencing and scheduling: The CM shall take into account the nature of all construction items, their execution prerequisites, the time limitation for this project, the impact of the weather and implication of the phased funding structure, as well as other pertinent factors, to establish an overall construction schedule showing how the work will be completed by the date(s) projected by the Owner; shall advise the Owner of the need for adjusting the projected completion date(s) if necessary; and with approval by Owner, shall implement the construction schedule in overseeing construction actions.*
3. *Construction phasing and contract packages: The CM shall take into account the nature of all construction items, the established construction schedule, the phased funding structure, the organization of the local construction industry, to separate the work into multiple contract packages that can facilitate a timely delivery of the completed work; shall, with approval by Owner, organize a bidding and contracting strategy accordingly; and shall oversee and coordinate the execution of these contract packages.*
4. *Cost projection, cost control and advise on design revisions: The CM shall prepare a probable construction cost estimate that is independent of the Design Consultant's estimate; shall compare the two estimates and investigate differences if any; shall reconcile the 2 estimates along with corrections if any, to establish a consensus estimate as a target budget for tracking and controlling cost in response to construction changes; and if and when requested by Owner shall advise Owner on the needs to revise the design to reduce cost or the opportunities for enhancing the design to improve quality.*
5. *Representing and protecting the interest of Owner: The CM shall perform the follow in respect of the interests of Owner:-*
 - a) *Construction Quality Assurance: The CM shall endeavor to ensure that the work performed and completed by contractors complies with the CD and applicable building codes, and its workmanship conforms to industry standards or better.*
 - b) *Cost Control: Consistent with item 4 noted above, endeavor to avoid unnecessary changes, ensure that the cost of change, if any is within market range, and reasonable.*
 - c) *Progress and schedule control: Consistent with item 2 above, endeavor to maintain projected progress of the work, avoid delays, and adjust sequencing to improve performance if necessary.*
 - d) *Job site safety and security: Take all measures necessary to prepare and maintain a safe and secure job site for the Owner, the workers and the public. See additional requirements in other sections of this RFP to follow.*
 - e) *Problem resolution: Take all measures necessary to address problems arising in the course of constructions, whether due to noncompliant contractor actions, work defects or deficiencies, or other problems, so as not to allow the problems to impact the overall progress and or quality of work. See additional requirements in other sections of this RFP to follow.*
 - f) *Proficient and efficient performance by the CM: The CM shall endeavor to perform proficiently and efficiently, avoiding work that does not contribute to meeting the objectives set forth in a) to e) above.*

III-B PHASE 1 CM SERVICES - DEVELOPMENT OF CONSTRUCTION STRATEGY CM ACTIONS

The CM shall begin work on this project by conferring with the Owner's PM and the DESIGN CONSULTANT to develop a construction strategy and to plan for CM actions accordingly. Actions during this stage may be concurrent to each other, and to other CM actions as necessitated by construction fast tracking. Actions shall include and are not necessarily limited to the following:

1. *Prepare and release the first bid package: The initial bid package maybe released prior to the completion of the comprehensive construction phasing plan and schedule, The CM shall confer with the PM and the DESIGN CONSULTANT to identify the first bid package, to prepare the bid documents by utilizing information contained in the bid set CD prepared by the DESIGN CONSULTANT, and to assist the PM in administering the bidding process.*
2. *Propose comprehensive construction phasing plan and schedule: identify the major construction phases, their execution sequence, and prepare a concise construction schedule shown the start and*

finish dates of each phase.

3. *Propose construction contract packages: Base on the information from step B above and other pertinent factors, propose the contract packages that can most effectively deliver the completed work by Owner's projected completion date(s). Estimate the probable construction cost of each package. If proven advantageous contracting may include utilization of Time and Material contractors current under contracts with Milwaukee County Zoo.*
4. *Overall construction budgeting: Base on the probable construction cost of the individual bid packages estimated in 2-C above, establish the probable construction cost of the entire project by presenting costs package by package.*
5. *Propose CM actions strategies and approaches: Propose, discuss with PM and finalize strategies and approaches for the following actions as well other actions that are pertinent but not listed wherein:-*
 - a) *Approaches for establishing detailed and master construction schedules which shall include submittal processing dates having significant impact on the progress and or completion of work.*
 - b) *Strategy for releasing individual bid packages.*
 - c) *Strategy for organizing the entire construction team which will have a gradually changing membership.*
 - d) *Strategy for organizing and coordinating work among multiple contract holders, addressing schedule coordination, sequential work, on site activities conflicts resolution, potential sharing of major equipment, job site security and safety responsibilities, etc.*
 - e) *Strategy for monitoring construction progress and maintaining or compressing the original schedule.*
 - f) *Strategy for managing communications and correspondences, such as Request for Information (RFI), Request for Proposals (RFP), Construction Bulletins (CB), Construction Change Directives (CCD), and other correspondences.*
 - g) *Strategy for managing submittals*
 - h) *Strategy for managing construction changes.*
 - i) *Strategy for monitoring and controlling costs.*
 - j) *Approach for utilizing meetings to maintain and or enhance construction progress, addressing meeting frequency, meeting format, typical agenda, minutes format etc.*
 - k) *Approach in managing construction site, addressing site access, site security, staging areas and code compliance issues.*
 - l) *Approach in addressing job site safety issues.*
 - m) *Approach in monitoring construction compliance and quality assurance, addressing daily documentation scope, critical item documentation, monitoring and documentation of construction sequence in the installation of items having significant potential life safety consequences.*
 - n) *Project close out procedures including guidelines for record drawings*

III-C PHASE 2 CM SERVICES - COMPREHESIVE CM ACTIONS

1. PREPARATION AND RELEASE OF INDIVIDUAL BID PACKAGES

Base on the schedule and contract packages established in 2-B and 2-C above; prepare and release each individual bid package accordingly. Actions shall include but are not necessarily limited to the following:

- a) *Scope of bid package: Refine the scope established in 2-C above to include all required items in details.*
- b) *Construction cost estimate updates: Base on the details identified 3-A above, update both the cost estimates of the package and the overall construction budget if applicable.*

- c) *Bid information: Identify the exact drawings and specification sections applicable to the bid package, including cross references.*
- d) *Schedule updates: Base on the details identified in 3-A above, prepare a detailed construction schedule for the items in the bid package, and update the master schedule accordingly.*
- e) *Bid documents: Organize the information identified in 3-B above in a logical manner and prepare bid documents presenting the information accurately and clearly in a format that allows bidders to arrive at true bid prices.*
- f) *Bidding: Assist Owner in the release of the bid package and in administering the bid process, including promoting the contracting opportunity in the construction industry community if appropriated.*
- g) *Contracting: Upon Owner's execution of a contract with the successful bidder of the bid package, prepare for the addition of the new member to the construction team.*

2. ORGANIZING AND LEADING THE CONSTRUCTION TEAM

Organize and lead the gradually changing construction team to ensure that all members cooperate to achieve a timely and successful completion of the work of each individual contractor and of the entire project. Actions shall include but are not necessarily limited to the following:

- a) *Team orientation: Introduce team members to each other and establish communication channels among members.*
- b) *Project orientation: Provide guidance to each team member for a thorough understanding of how the member's work intersects with the work of others and its position in the structure of the entire project.*
- c) *Schedule orientation: Provide guidance to each team member for a thorough understanding of the execution schedule for the member's work and the overall schedule including the segments for the member's work.*
- d) *Leadership: Provide leadership in daily activities, at construction meetings, and in resolution of conflicts among members.*

3. ORGANIZING AND COORDINATING, AND OVERSEEING CONSTRUCTION ACTIONS

- a) *Preparing for start of construction: Take actions to provide, or to ensure that other responsible parties are in place to provide the following:*
 - 1) *Construction Permits*
 - 2) *Request for underground utilities marking*
 - 3) *Arrange for construction survey and staking.*
 - 4) *Site security provisions*
 - 5) *Construction safety provisions*
 - 6) *Erosion control provisions*
 - 7) *Temporary utilities*
 - 8) *Temporary sanitary facilities*
 - 9) *Site lighting*
 - 10) *Field offices*
 - 11) *Creating a system and a facility for maintaining on site copies of all project documents.*
 - 12) *Instituting a construction change recording system to facilitate date to date recording of construction changes on the CD or similar medium*
 - 13) *Major construction equipment such as cranes, lifts, scaffoldings.*
 - 14) *Construction signs and other sign that may be required, including posting of construction permits, wages rules if applicable, and safety rules.*
- b) *Develop a site manage plan along with a map to determine and designate job site areas for trucking, staging, material storage etc., and distribute the plan and map to all team members.*

- c) *Arrange for construction surveys.*
 - d) *Call, arranged for and conduct preconstruction meeting, prepare and distribute agenda and minutes.*
 - e) *Implement and monitor construction schedule, sequencing and progress.*
 - f) *Coordinate intersecting construction actions by discussing with team members how the sequential items are to be executed.*
 - g) *Arrange for testing and inspections, including inspection by building officials.*
 - h) *Problem resolution: Where problems occur due to noncompliant contractor actions, work defects or deficiencies, safety violation, or other problems, notify Owner and Design Consultant of the problem and direct the responsible party to make corrections. Where a contractor fail to make correction, recommend to Owner the proper cause of actions in respond*
4. MANAGING SUBMITTALS
- a) *Develop and maintain a submittal schedule, publish the schedule and direct all pertinent parties to follow the schedule.*
 - b) *Develop and maintain a submittal log, publish the log as required.*
 - c) *Facilitate the submittal, review process approval and distribution.*
 - d) *Retain copies of all approved submittals for return to Owner at projection closing.*
5. MANAGING COMMUNICAITONS AND PROJECT CORRESPONSES
- a) *Develop and publish a communications organization chart.*
 - b) *Streamline the communications process with the intent of conserving the time devoted to that process by all parties concerned. Avoid creating documents that repeat contents already contained in correspondences from others.*
 - c) *Enforce communications protocols to ensure that they are following by all parties concerned.*
 - d) *Develop, maintain and publish correspondence logs for RFI, CB, CCR etc. See Managing Changes discussed below.*
6. MANAGING CONSTRUCTION CHANGES
- For each type of correspondences listed below pertaining to construction changes, facilitate the submission, review, reply process; develop, maintain and publish a log to track responses, resolutions and implementations; and also maintain record drawings for recording of all changes:*
- a) *RFI – Request for Information from a contractor*
 - b) *CB – Construction Bulletin from Design Consultant*
 - c) *CCD – Construction Change Directive from Design Consultant*
 - d) *RFP – Request for Proposal from Design Consultant*
 - e) *RFC or COR – “Request for Contract Change” or “Change Order Request”: At receipt of a request from a contractor, confer with Owner and Design Consultant to verify that the scope of change is legitimate; apply available market cost data to ensure the cost change request is reasonable; inform Owner and Design Consultant the findings, and make recommendation for further action(s).*
 - f) *AA – Allowance Authorization: When directed by Owner, prepare the AA, forward to pertinent parties for signatures and then to Owner for official release. Maintain a log.*
 - g) *CO – Change Order: When directed by Owner, prepare the CO, forward to pertinent parties for signatures and then to Owner for official release. Maintain a log.*
 - h) *Record drawings: Maintain in job site a set of construction drawings, record changes as they are implemented. Also see 3-a)-12) above.*
7. WEEKLY CM TASKS:

- a) *Weekly progress review meeting: Call and arrange for the meeting, prepare and distribute agenda, conduct meeting and prepare and distribute minutes*
- b) *Weekly progress report: Report to Owner on work progress. The report shall be included in the weekly meeting agenda*
- c) *Weekly construction action plan: With inputs from all team members, develop an action plan for a work week each week. The plan shall be included in the weekly meeting agenda.*
- d) *Weekly review of construction schedule: Review construction status, note deviation from schedule if any and facilitate correction of the deviation. The review, report and deviation correction measures shall be included in the weekly meeting agenda.*

8. DAILY CM TASKS

- a) *Hold on site foremen's meeting as required.*
- b) *Conduct daily general inspection of work.*
- c) *Evaluate work status against established schedule, note deviation if any for consideration of corrective actions.*
- d) *Facilitate sequencing of work of multiple team members.*
- e) *Evaluate work to ensure it conforms to construction documents, and workmanship is acceptable; notify Owner and Design Consultant where defects and or deficiencies are found, if any.*
- f) *Evaluate job site conditions to ensure that safety and security standards are maintained and being observed. Take appropriate actions to correct violations, if any.*
- g) *Take photos of work where a completed item will be hidden by subsequent work and the item has life safety implications, and, of defects and or deficiencies noted in 8-e) above.*
- h) *Confer with PM on pertinent matters*
- i) *Prepare and distribute daily report noting only general status, defects and or deficiencies, and or safety violations listed in 8-c), 8-e) and f) above, and correction made or ordered, if any.*
- j) *Maintain record drawings per 3-a)-12) and 6-h) above.*

9. MONTHLY CM TASKS

Report to Owner on a monthly basis the following matters

- a) *Processing Contractors' progress payment applications: Receive and facilitate processing of contractor's applications for payment, follow the requirements set forth in the project manual for each contract, verify that all items are included correct and in good order; forward the accepted application to pertinent parties for signature and processing.*
- b) *Budget status report: For the period starting at construction commencement and ending at the end of the prior month, report the follow:*
 - 1) *The aggregate total amount expended for the overall project*
 - 2) *The corresponding percentage of 1) above in respect of the budget*
 - 3) *The aggregate amount expended for each contractor*
 - 4) *The aggregate number of contract sum changes and the aggregate total amount of change*
 - 5) *A projection of potential surplus or deficit*
- c) *Work completion date projection and schedule adjustment – report the following:*
 - 1) *The aggregate percentage of work complete for the period noted in b) above.*
 - 2) *A projection of completion date based on current progress.*
 - 3) *The number of days work is impacted by the weather.*
 - 4) *The number of unfavorable weather days typical of the month*
 - 5) *The aggregate number of days work is impacted by the weather for the period noted in b) above*

- 6) *The aggregate number of unfavorable weather typical of the period noted in b) above*
- 7) *A projection of completion extension due to unfavorable weather.*
- d) *Other matters as deem appropriate.*

10. PROJECT CLOSE OUT

The CM shall facilitate, coordinate and or otherwise perform the following project close out tasks.:

- a) *Initial system start up: For each system in a building confer with pertinent contractor, Owner and Design Consultant, to establish the date and procedures for initial system start up, arrange and facilitate the startup session. Record results.*
- b) *System testing and balancing: After a successful initial startup of a system, confer with only to arrange for testing and balancing, facilitate the session and receive testing report from the testing agent.*
- c) *Punch out: Confer with each contractor, Owner and Design Consultant, to establish the date and procedures for punch out, prepare pre-punch out checklist arrange and facilitate the punch out session. Record required correction(s) noted by Owner or Design Consultant and prepare punch list.*
- d) *Final system commission: Upon the completion of corrections noted on a punch list confer with pertinent contractor, Owner and Design Consultant to establish a date for the final commission of the respective system, record results.*
- e) *Completion of punch list items: For each contract, the CM shall determine a date when correction of punch list items shall be completed. And upon notification from the contractor of the completion, inspected the complete work, note deficiencies and order further corrections if any. Upon final acceptance of completed work. Notify Owner and or Design Consultant for final inspection*
- f) *O&M manual and training for Owner: Confer with pertinent contractor and Owner to establish a date for training on operation and maintenance (O&M) for Owner representatives. Receive and transmit to Owen respective O&M manuals.*
- g) *Building officials' close out inspection: Arrange for final inspections by building officials. Or otherwise notified the parties responsible for same.*
- h) *Occupancy and other permits: Upon the conclusion of all punch out(s), obtain occupancy permits and other permits that may be required from appropriate authorities, or as maybe applicable notify the parties responsible for obtaining certain permits the actions required.*
- i) *Substantial completion certificate: Confer with each contractor, Owner and Design Consultant to establish a date to be designed at the substantial completion date for the respective contract, prepare substantial completion certificate and submit to pertinent parties for signature*
- j) *Processing contractors' final payment applications: Receive and facilitate processing of contractor's applications for payment, follow the requirements set forth in the project manual for each contract, verify that all items are included correct and in good order; forward the accepted application to pertinent parties for signature and processing.*
- k) *Warranty certificates: Receive from contractors required warranty certificates and transmit same to Owner.*
- l) *Project files: Transmit all project documents maintained by CM at job site or elsewhere to Owner.*
- m) *As built drawings: Receive and transmit to Owner from all contractors final as built record drawings. And as may be required prepare a complete as built drawing set per specifications to be issued by Owner. See Reimbursable Expenses and Allowance stipulation in the Consultant Fee section of this RFP.*
- n) *Post-substantial completion review: Upon request of Owner, and prior to expiration of one year from the date of Substantial Completion, the CM shall, without additional compensation, conduct a meeting with the Owner, to review the facility operations and performance. The Design Consultant and contractors may also be invited to attend the meeting. The CM shall record*

warranty claims made by Owner if any, review each claim with the Design Consultant and the pertinent contractor, and issue claim notice.

- o) *Other requirements: Refer to Project Close Out Section in the Project Manual for additional close out requirements*

IV. PROJECT TIMETABLE

1. **August 05, 2015:** Issue Request for Proposal. CD of attachments is available upon request.
2. **August 07, 2015:** Pre-proposal meeting and site visit: 8:15 am Zoo Flamingo Café and job site.
3. **August 14, 2015:** RFP Due: 2 pm
4. **August 18, 2015:** Selection Committee selects consultant.
5. **August 19, 2015:** Pre-award interview of primary consultant staff member(s) assigned to the project.
6. **August 20, 2015:** Consultant award notification (will occur no sooner than this date).
7. **August 21, 2015:** Offer, negotiate and execute a contract with selected consultant.
8. **Early Sept, 2015:** Phase 1 CM services begin.
9. **Late Sept, 2015:** Anticipated Construction Start of contract package 1.
10. **Late Sept, 2015:** Phase 2 CM services begin.
11. **Mid-June, 2016:** Completion of admissions, retail and restrooms facilities. Shall construction of other exhibit and holding facilities be not completed by this time, CM services shall pause until construction resumes.
12. **TBD:** Completion of other exhibit and holding facilities.

V. PROPOSAL CONTENT

The proposal shall conform to Milwaukee County's Proposal Preparation, Submission and Evaluation Guidelines (see Attachment 4). The proposal shall include the Consultant Proposal Form (see Attachment 5) and the following information:

1. **Cover:** Include project number and name, project location, consultant's name, address, telephone number, FAX number, e-mail address, proposal date, etc.
2. **Table of Contents:** Include an identification of the material by section and page number.
3. **Letter or Transmittal:** The name and description of the organization submitting the proposal briefly stating the proposer's understanding of the service to be provided.
4. **Organization Description:** A brief description of the organization submitting the proposal. Include the name, size, legal status (corporation, partnership, etc.), professional registration/certification, and major type of activity or areas of consulting. The organization must be licensed to operate in the State of Wisconsin. Include a copy of current license, certification or registration.
5. **Organization's Experience:** Include a list of similar projects that the organization has participated on in the past five (5) years. Include a list of similar projects that the organization has participated in the past five (5) years. Experience in construction management of public works facilities is desirable. Attach a separate sheet for each project, up to five (5) maximum, giving a brief description of each project and the organization's participation.
6. **Project Organization and Staff Experience:** Include an organizational structure of the project team, including the relationship of the sub-consultants to be used for this project. The name of the Principal In Charge of this project along with the name, occupation and title of the Project Manager who will be in charge of the day to day delivery of CM services. Provide a resume for each individual who will be involved in the project, with name, title

and/or duties for this project, professional registration, relevant certifications, a brief description of related experience including time contribution in this capacity to past projects, and qualifications.

7. **Alternate Principal-In-Charge:** Include the name of an Alternate Principal-in-Charge in the event that the originally designated Principal-in-Charge is not able to fulfill his/her duties. Milwaukee County reserves the option to select an Alternate Principal-in-Charge.
8. **Sub-Consultants:** Indicate the names and addresses of any sub-consultants and/or associates proposed to be used in this project. State the capacity they would be used in and the approximate percentage of the total services they would provide. Also state their past experience in the field.
9. **Project Approach:** Provide a description of Construction Management problems you anticipate in this project and how you propose to overcome them. Discuss how you plan to staff the project to efficiently complete the work effort.
10. **Scheduling:** Submission of a schedule is optional and if included shall be Based the schedule provided in this RFP.
11. **Constant Effort:** Include a spreadsheet/matrix listing the names, classifications, hourly rates and hours to be spent by each required task to complete the project as described in this RFP.
12. **DBE Participation and Goal:** The Disadvantaged Business Enterprise (DBE) participation for this contract is **25%**. The proposal shall include names and addresses of the DBE firms who will participate in this project, the tasks performed by them and percentage of work represented by the assigned tasks. For assistance, contact the DBE/CBDP office at 276-5248.
13. **Equal Opportunity Employer:** The CM and all associated consultant(s) must be an Equal Opportunity Employer. Proof of this shall be indicated in that section of the Proposal.
14. **Quality Control:** Submit a CM performance monitor and deficiencies correction plan, describing the organization's structure for these purposes, the person and procedures for filing of performance complaints by Owner. .
15. **Fee Proposal:** The fees for this CM contract shall be clearly stated as lump sum not-to-exceed fees for these services. They shall include the following separately stated proposals:
 - a) Fee for Phase 1 CM services stated in section **III-B** above
 - b) Fee for Phase 2 CM services stated in section **III-C** above
 - c) Project startup reimbursable expenses allowance - **\$50,000**: Covering those items listed in section **III-C-3** that will not be provided by other parties; the allowance is to be expended only with the prior approval of the Owner.
 - d) As built drawing preparation allowance - **\$28,000**: covering the preparation of Owner requested and specified as built drawings described in section **III-C-10-m**, the allowance is to be expended only with the prior approval of the Owner.
 - e) List any other reimbursable expenses anticipated, include the purposes of each expense and the amount.
16. **CM strategy/approach questions and optional answers:** The following questions pertain to how the CM candidates may address certain specific issues in formulating a detailed strategy to manage this project. However, answer any or all question is optional, Submit optional answer(s) to these questions on a separate sheet to be follow the statement on project approach list in section **V-9** above:-
 - a) What is the most probable construction cost of the entire project? An answer arrived at by a detailed item by item estimation is not required and highly discouraged.
 - b) What is the most probable construction cost of the outdoor portion of the otter exhibit without the viewing shelter? An answer arrived at by a detailed item by item estimation and/or with inputs by a third party is not required and highly discouraged.

- c) What is the most probable construction cost of the restroom interiors? Assuming that the shell and all utilities to the building are fully completed, and major HVAC equipment and electrical service are already installed. An answer arrived at by a detailed item by item estimation is not required and highly discouraged.
- d) What is the most probable construction cost of the HVAC system in the retail and restrooms building? An answer arrived at by a detailed item by item estimation if not required and highly discouraged.
- e) How many contract/bid packages the project should be divided into, and why? Listing of the scope of each package is not necessary.
- f) What are the two factors with the greatest impacts on how to divide the work into separate packages?
- g) What items should constitute the first contract/bid package? Assuming that earthwork, footing/foundation and utilities and already included
- h) Other than finances, what is the factor with the greatest impacts on the prospect of construction in meeting the completion date(s) listed in the project schedule?

VI. PROPOSAL EVALUATION

See the attached Milwaukee County Proposal Preparation, Submission and Evaluation Guidelines for the evaluation criteria. Proposers must recognize this is not a bid procedure, and a Professional Services agreement will not be awarded solely on the basis of the low fee proposal. Milwaukee County reserves the right to accept or reject any and all proposals, issue addenda, request clarification, waive technicalities, alter the nature and/or scope of the proposed project, request additional submittals, and/or discontinue this process.

VII. GENERAL REQUIREMENTS

1. The successful CM consultant and/or any contractor affiliated with the prime CM consultant shall be prohibited from submitting bids in the construction bidding process for this project or to provide service to a contractor or a subcontractor performing work on this project; and from retaining the Design Consultant and or its subconsultants to perform work for the CM consultant and/or any contractor affiliated with the prime CM consultant.
2. Selected Consultant shall follow Milwaukee County Code of Ethics as follows: No person(s) with a personal financial interest in the approval or denial of a Contract being considered by a County department or with an agency funded and regulated by a County department, may make a campaign contribution to any County official who has approval authority over that Contract during its consideration. Contract consideration shall begin when a Contract is submitted directly to a County department or to an agency until the Contract has reached final disposition, including adoption, County Executive action, proceeding on veto (if necessary) or departmental approval.
3. All proposals should use this RFP and its attachments as the sole basis for the proposal. The issuance of a written addendum is the only official method through which interpretation, clarification or additional information will be given.
4. Proposals shall respond to each component as listed in the Proposal Content section, in order as presented and in the form for format as requested. Each response shall identify the heading and shall respond entirely to each segment without reference to any other part of the Proposal.
5. The proposal shall be submitted in a single bound 8-1/2" x 11" document.
6. Submit three (3) copies of your proposal in a single envelope. Envelope shall be identified with submission date, RFP title, Project Number, and Name and Address of the submitting party. Envelopes which are not properly identified or received after the time and date noted above will be rejected.
7. All costs for preparing a proposal, attending the selection interview if required, or supplying additional

information requested by Milwaukee County, are the sole responsibility of the submitting party. Material submitted will not be returned.

8. With the signing and submission of a statement or proposal the submitting consultant certifies that the standard terms and conditions of the Agreement for Professional Services (that will be used to contract with the selected consultant) has been read and understood and that the submitting consultant is ready, willing and able to sign the agreement when requested without making any substantive changes.

Please submit your proposal no later than **2 P.M. on Friday, August 14, 2015**, to **Philip T. Hung**, Project Manager, 633 W. Wisconsin Ave, 10th Floor, Milwaukee, Wisconsin, 53203 (Telephone (414) 278-4847, FAX (414) 223-1366; email: philip.hung@milwaukeecountywi.gov.

Please direct any questions regarding this RFP to me at the above address, FAX number or email address.

Sincerely,



Philip T. Hung, Architect,
Project Manager

Attachments:

- 1) Project Location Map (1 page)
- 2) Sample Type C Standard Agreement (46 pages)
- 3) Proposal Preparation, Submission and Evaluation (5 pages)
- 4) Consultant Proposal Form (1 page)
- 5) Disadvantaged Business Enterprise (DBE) Instructions and Forms (5 pages)
- 6) Z150-4452-Zoo West Parking Lot Revised Grading Plan
- 7) 90% complete project construction documents set

cc: G. High, DAS-FM
G. Drent, DAS-FM

Paul Montalto
Project Manager, DAS-FM

Owner Dept.- Zoo
Brian Engel, CDBP