

**Pelham Union Free School District  
Business Office  
575 Colonial Avenue  
Pelham, New York 10803**

**REQUEST FOR PROPOSALS**

**The Board of Education of the Pelham Union free school district hereby invites the submission of proposals for the following professional services:**

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**Construction Management Services (Pre-Referendum)**

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Forms for proposal, certification, conditions, and specifications may be obtained at the District website, [www.pelhamschools.org](http://www.pelhamschools.org), by selecting “District” from the drop-down menu, and choosing “District Office Requests for Proposal (RFP).” Forms may also be obtained at the District Business Office located at the above address or by calling 914-738-9140 x1140. In all cases it must be understood that conditions and specifications of the Pelham Union Free School District shall apply.

Sealed proposals must be addressed to the attention of Linda Purvis, Interim Business Official, and clearly marked **“Proposal for Construction Management Services – Pre-Referendum.”**

Proposals will be received until 11 a.m. on Thursday, April 13, 2017 at the Pelham UFSD Business Office located at 575 Colonial Avenue, Pelham, New York, 10803, at which time and place all proposal packages will be publicly opened and subsequently evaluated.

The Board of Education reserves the right to consider qualifications, experience, and reputation in the construction management services industry, as well as the specific qualifications of a proposer set out herein, in considering proposals and awarding the contract. The Board of Education reserves all rights and may reject any or all bids/proposals as it may deem appropriate to do so.

DATED: March 29, 2017

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www.Pelhamschools.org  
Phone (914) 738-9140 Fax (914) 738-2384**

**REQUEST FOR PROPOSAL (RFP)  
CONSTRUCTION MANAGEMENT SERVICES (PRE-REFERENDUM)**

**Proposals Accepted Until 11 A.M., April 13, 2017**

To Whom It May Concern:

The Pelham Union Free School District is soliciting Proposals for **Construction Management Services (Pre-Referendum)** in connection with a proposed capital projects referendum.

The Board of Education is considering a variety of capital improvements including reconstruction and renovation projects at all six (6) of the District's schools, as well as new instructional spaces. A ten-year enrollment forecast was recently completed, and a facilities capacity study is being prepared in conjunction with this planning. Together these evaluations will provide important information as the Board considers the future adequacy and appropriateness of its facilities.

For the purpose of this Request for Proposal, we ask that you assume a potential total cost range of \$25,000,000 to \$40,000,000. The services to be provided are described in **Appendix A** and the list of potential projects is included in **Appendix B**. The services to be provided by the Construction Management firm will assist the Board of Education in determining the final scope of the proposal to be put to voters.

In addition to completing and submitting all forms specified in this document, written proposals outlining the firm's history and project management philosophy, including present size, in-house disciplines, and special areas of expertise are also encouraged. Of special interest are projects carried out by your firm which are directly relevant to the District's capital projects. A written proposal should include a brief conclusive summary of why your firm should be selected. All submittals shall be considered in the evaluation of each firm's proposal.

**Dates and Deadlines**

Sealed proposals will be received until Thursday, April 13, 2017 at 11 A.M. at the Pelham UFSD Business Office, 575 Colonial Avenue, Pelham. They should be marked as **"Proposal for Construction Management Services – Pre-Referendum,"** addressed to:

Linda Purvis,  
Interim Business Official  
Pelham Union Free School District  
575 Colonial Avenue  
Pelham, New York 10803

The proposals will be reviewed by the District's staff, including but not limited to the Superintendent of Schools, the Interim School Business Official, and the Director of Facilities. Approximately three finalists will be selected for interviews with the District Bond Steering Committee during the week of April 24, 2017. It is anticipated that the Board will select a consultant at its meeting on May 2, 2017.

THE BOARD OF EDUCATION RESERVES ALL RIGHTS AND MAY REJECT ANY OR ALL PROPOSALS AS IT MAY DEEM APPROPRIATE TO DO.

**Required Submissions:**

The proposal should be submitted in three (3) parts as described on page six of this Request. The first two parts are to be written or provided by the Proposer in the format they believe to be most responsive to the inquiry. The third part includes all of the attachments listed below and included in this document. *All documents must be completed and submitted in order for the proposal to be evaluated.*

- Attachment 1: Corporation or Partnership Information and List of Sub-Contractors
- Attachment 2: Agreement to Terms of Discussion
- Attachment 3: Proposal Certifications
- Attachment 4: Complete Reference Information
- Attachment 5: Hold Harmless Agreement
- Attachment 6: Additional Proposer's Certification
- Attachment 7: Proposal Form

Respondents should submit an original and four (4) copies of their proposal.

**Evaluation Criteria**

Proposals will be evaluated and scored on the basis of the following criteria:

1. **Experience and Qualifications of the Proposer:** Consideration will be given to proposers demonstrating strong capabilities, experience and reputation in undertakings similar to those described in the RFP, and providing authoritative documentation of their financial soundness and stability. Such experience will include:
  - a. At least five (5) years' experience in the provision of construction management services on projects of similar size and/or scope as the projects described herein;
  - b. At least five (5) years' experience in the provision of engineering, consulting and cost estimating services on projects of similar size and scope as the projects described herein;

- c. A demonstrated understanding of the project requirements and District needs, including the need for effective collaboration with the District's construction professionals, and a District Bond Steering Committee.

- 2. Ability to Implement Project Promptly:** Preference will be given to proposals demonstrating an ability to carry out the tasks outlined in the proposal in a prompt and efficient manner.
- 3. Fee:** The cost of the services will be a consideration, but will not be the primary factor in the selection of a construction management provider.

The District has the right to reject any and all proposals if it deems that such action serves the best interests of the District. This RFP does not commit the District to award a contract or pay any cost incurred in the preparation of a proposal in response to this RFP. The District may select that proposal which, in the District's sole discretion and with whatever modifications the District and the Proposer may mutually agree upon, that best meets the District's requirements.

Any questions regarding the RFP or procedures for responding shall be directed to me via e-mail (lpurvis@pelhamschools.org). I will respond to questions via e-mail addenda to all proposers who provide email contact information.

Thank you for your interest in the Pelham Union Free School District.

Very truly yours,

Linda S. Purvis  
Interim School Business Official  
Pelham Union Free School District

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**APPENDIX A:  
ANTICIPATED SCOPE OF SERVICES (PRE-REFERENDUM)**

The following list outlines the desired scope of pre-bond services. This list should be used as a framework for the descriptions of services to be provided by your firm. Your proposal (Section A) should clarify how you will accomplish each task.

- Assist District with the creation of a timeline of key activities leading to referendum.
- Assist Architect with evaluation of facilities.
- Assist District staff in defining parameters of projects to assure that programming needs, budgetary constraints, and building code requirements are aligned.
- Work with the District's staff to determine feasibility of proposed projects.
- Provide conceptual total cost estimates as a tool to guide the Board of Education's decisions; coordinate cost estimates with the Architect.
- Provide construction and incidental cost budgets for preliminary designs and advise the District on required contingency budgets.
- Assist the Board as needed with community outreach and public information materials
- Work with District staff to develop a timeline and schedule, including phasing.

**The Board expects to receive preliminary cost estimates approximately 4-6 weeks after appointment of the construction management consultant.**

**In the event the Board of Education decides not to proceed with the capital construction plan prior to October 2017, the District shall notify the Consultant in writing. It is understood that the Consultant shall be paid, based on the hourly rates shown on his/her proposal, for work completed to the date of such notification by the District, to a maximum of the fee amount proposed in Attachment 7 of the Form of Proposal.**

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**APPENDIX B:**  
**SCOPE OF WORK**

**A final scope for the bond referendum has not yet been determined, but for the purposes of responding to this Request, please use a range of \$25,000,000 to \$40,000,000. Following is a list of areas that will be evaluated for cost and feasibility:**

- Building envelope replacement\* (brick façade, windows and lintels), and the addition of classrooms at Hutchinson School
- Handicapped accessibility at three elementary schools, including the addition of elevators at each of the three elementary buildings
- Cafeteria/multipurpose room additions at four elementary schools
- Air conditioning at four elementary schools
- Addition for performing arts instructional space at Pelham Memorial +High School
- Boiler replacements at five schools
- Rooftop air conditioning unit replacements at the Pelham Middle School
- Select field renovations

\*Detailed cost estimates of the building envelope work have already been prepared by a consulting engineer. The project is included here, as the scope and phasing schedule will be affected by a decision to add classrooms and/or other space to the building.

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**APPENDIX C:**  
**LIST OF FACILITIES (ALL LOCATED IN TOWN OF PELHAM, NY)**

**Colonial School**  
315 Highbrook Avenue  
914 738 2680

**Hutchinson School**  
301 Third Avenue  
914 738 3640

**Prospect Hill School**  
1000 Washington Avenue  
914 738 6690

**Siwanoy School**  
489 Siwanoy Place  
914 738 7650

**Pelham Middle School**  
28 Franklin Place  
914 738 8190

**Pelham Memorial High School**  
575 Colonial Avenue  
914 738 8110

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## **PROPOSAL FORMAT AND CONTENTS**

Proposals must be submitted in the format outlined in this section. Each of the three (3) sections described below must be completed in full. The District reserves the right to eliminate from further consideration any proposal deemed to be non-responsive to the requests for information contained herein. Each of the sections described below should begin on a separate page, and each page should state the name of the Proposer in the upper right hand corner.

### **Section A: Proposer Background, Qualifications, and Proposal Compliance**

This section of the proposal must contain a description of the Proposer's capabilities and experience relative to the required services. It should describe the composition of the project team, and a detailed statement as to how the Proposer intends to meet the requirements of the proposal as outlined in the introductory letter for the RFP. This section should describe the prior relevant experience of the members of the project team.

Information similar to that described above should also be provided for each independent contractor that the Proposer plans to use in the provision of services required by the agreement.

### **Section B: Financial Background Information**

This section of the proposal must contain detailed information concerning the financial background of the Proposer and any independent contractors to be engaged by the Proposer, including but not limited to financial statements, annuals reports, and the like covering the most recent fiscal year for the Proposer.

### **Section C: Form of Proposal (Attachments 1 through 7)**

Proposals submitted pursuant to this RFP shall include all information requested in Attachments 1 through 7 in substantially the format shown on these Attachments. The District reserves the right, at its discretion, to eliminate from consideration any proposal that does not include all required information.



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**SECTION C: Form of Proposal**

**Attachment 1: CORPORATION OR PARTNERSHIP INFORMATION**

FIRM NAME \_\_\_\_\_

BUSINESS ADDRESS \_\_\_\_\_

TELEPHONE NUMBER \_\_\_\_\_

EMAIL \_\_\_\_\_

OFFICERS	ADDRESS	TITLE

**SUB-CONTRACTOR INFORMATION**

NAME	ADDRESS	TITLE

**Note: All sub-contractors must be pre-approved by Pelham UFSD. Consultant must notify Pelham UFSD of any additional sub-contractors not listed above.**

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**SECTION C: Form of Proposal**

**Attachment 2: AGREEMENT TO TERMS OF DISCUSSION**

The District’s receipt or discussion of any information submitted in response to the District’s RFP, and prior to contract award by the District Board of Education, including information submitted during discussions after said submittal, will not impose any obligations whatsoever on the District or entitle us to any compensation, except to the extent specifically provided in such written agreement, if any, as may be entered into between the District and the firm. Any such information given, either orally or in writing, is not given in confidence and may be used, or disclosed to others, for any purpose at any time without obligation or compensation and without liability of any kind whatsoever. Any statement which is inconsistent with this agreement, whether made as part of or in connection with any information received from us in any fashion, shall be null and void and of no effect.

The foregoing applies to any information, whether or not given at the invitation of the District.

\_\_\_\_\_  
OFFICER OF COMPANY (SIGNATURE)

\_\_\_\_\_  
DATE

\_\_\_\_\_  
TITLE

\_\_\_\_\_  
TELEPHONE NUMBER

\_\_\_\_\_  
COMPANY

\_\_\_\_\_  
FAX NUMBER

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
EMAIL

Proposer \_\_\_\_\_

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**SECTION C: Form of Proposal**

**Attachment 3: PROPOSAL CERTIFICATIONS**

FIRM NAME \_\_\_\_\_

BUSINESS ADDRESS \_\_\_\_\_

TELEPHONE NUMBER \_\_\_\_\_

EMAIL \_\_\_\_\_

**1. General Certification**

The Proposer certifies that he/she will furnish services as described herein at the price herein quoted.

**2. Non-Collusive Certification**

By submission of this proposal, the Proposer and each person signing on behalf of the Proposer certifies that to the best of its knowledge and belief:

- a. The prices in this proposal have been arrived at independently without collusion, consultation, communication or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other competitor.
- b. Unless otherwise required by law, the prices which have been quoted in this proposal have not knowingly been disclosed by the Proposer and will not knowingly be disclosed by the Proposer prior to opening, directly or indirectly to any other competitor; and
- c. No attempt has been made or will be made by the Proposer to induce any other person, partnership, or corporation to submit or not to submit a proposal for the purpose of restricting competition.

SIGNATURE \_\_\_\_\_

NAME \_\_\_\_\_

TITLE \_\_\_\_\_

DATE \_\_\_\_\_

Proposer \_\_\_\_\_

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**SECTION C: Form of Proposal**

**Attachment 4: REFERENCE SHEET**

All proposers will be required to complete this form providing three references of past performance. References should involve projects and/or service situations of similar size and scope to this Request for Proposal. References must have had dealings with the Proposer within the last thirty-six months. The District reserves the right to contact any or all of the references supplied for an evaluation of past performance in order to establish the responsibility of the Proposer before the actual award of the contract. Completion of the reference form is required.

PROPOSER'S NAME: \_\_\_\_\_

DATE FILED: \_\_\_\_\_

COMPANY NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY/STATE/ ZIP: \_\_\_\_\_

OFFICER: \_\_\_\_\_

CONTACT: \_\_\_\_\_

EMAIL: \_\_\_\_\_

FEDERAL ID #: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

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**SECTION C: Form of Proposal**

**Attachment 4 (continued)**

**REFERENCE #1:**

CONTACT: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY/ STATE/ ZIP: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

EMAIL: \_\_\_\_\_

BRIEF DESCRIPTION OF PROJECT, INCLUDING COST:

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

**REFERENCE #2:**

CONTACT: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY/STATE/ ZIP: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

EMAIL: \_\_\_\_\_

BRIEF DESCRIPTION OF PROJECT, INCLUDING COST:

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

Proposer \_\_\_\_\_

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**Attachment 4 (continued)**

**REFERENCE #3:**

CONTACT: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY/STATE/ZIP: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

**BRIEF DESCRIPTION OF PROJECT, INCLUDING COST:**

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Proposer \_\_\_\_\_

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**SECTION C: Form of Proposal**

**Attachment 5: HOLD HARMLESS AGREEMENT**

The undersigned hereby agrees to defend, indemnify, and save harmless the Pelham Union Free School District from and against any and all liability, loss, damages, claims for bodily injury and/or property damages, cost and expense, including counsel fees, to the extent permissible by law, that may occur or that may be alleged to have occurred in the course of the performance of this agreement by the Proposer, whether such claims shall be made by an employee of the Proposer or by a third party. The Proposer covenants and agrees that he will pay all costs and expenses arising therefrom and in connection therewith, and if any judgment shall be rendered against the District, in any such litigation, the Proposer shall at his own expense satisfy and discharge the same.

REPRESENTATIVE \_\_\_\_\_

SIGNATURE \_\_\_\_\_

TITLE \_\_\_\_\_

COMPANY NAME \_\_\_\_\_

DATE \_\_\_\_\_

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**SECTION C: Form of Proposal**

**Attachment 6: PROPOSER’S CERTIFICATION**

The below-signed Proposer affirms the following as true under penalties of perjury:

By submission of this proposal the firm/company and each person signing on behalf of the firm/company certifies, under penalty of perjury, that to the best of his/her/its knowledge and belief that the Proposer is not on the list created pursuant to paragraph (b) of subdivision 3 of Section 165-a of the state finance law.

Corporate or Company Name\_\_\_\_\_

By \_\_\_\_\_  
Signature Title

State of \_\_\_\_\_

County of \_\_\_\_\_

Sworn before me this

\_\_\_\_\_ Day of \_\_\_\_\_, 20\_\_\_\_\_

\_\_\_\_\_  
Notary Public

Seal



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**SECTION C: Form of Proposal**

**Attachment 7: PROPOSAL FORM**

1. **Fee Proposal** The scope of work under consideration is listed in Appendix B. Please indicate below your proposed fee.

Fixed dollar fee for pre-referendum services as described in Appendix A and relating to the project list shown in Appendix B excluding the reimbursable expenses listed below under Part 2: \$ \_\_\_\_\_

2. **Reimbursable Expenses** to be billed at \_\_\_\_\_ times the amounts expended by the Proposer, employees of the firm, and/or consultants hired by the Proposer for services related to the project.

Please identify reimbursable cost items and services that are anticipated and not included in the Consultant's fee. If possible, please provide an estimate of the additional costs to be incurred.

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**SECTION C: Form of Proposal**

**Attachment 7: PROPOSAL FORM (continued)**

3. **Additional Services**, as requested by the District, to be billed at the following hourly rates:

Partner \$\_\_\_\_\_/hour

Associate \$\_\_\_\_\_/hour

Other (specify) \$\_\_\_\_\_/hour

Other (specify) \$\_\_\_\_\_/hour

**4. Submission of invoices**

The Proposer agrees to submit invoices in accordance with the proposed fee schedule shown in this Attachment based on the sum of the construction contracts and percentage of construction work completed, or fee earned as measured by the percentage of construction work completed. A separate invoice shall be presented for each project.

**5. Proposal submitted by:**

REPRESENTATIVE \_\_\_\_\_

SIGNATURE \_\_\_\_\_

TITLE \_\_\_\_\_

COMPANY NAME \_\_\_\_\_

PHONE \_\_\_\_\_ EMAIL \_\_\_\_\_

DATE \_\_\_\_\_