



**REQUEST FOR PROPOSAL**

**CONSTRUCTION MANAGEMENT SERVICES**

**FOR  
COMMUNITY HEALTH AND WELLNESS CENTER**

**FOR**

**FALLBROOK REGIONAL HEALTH DISTRICT  
FALLBROOK, CALIFORNIA**

**August 2022**

Rachel Mason, Chief Executive Officer  
Fallbrook Regional Health District  
138 S. Brandon Road  
Fallbrook, California 92028  
Phone: 760-731-9187

## **INTRODUCTION CONSTRUCTION MANAGEMENT SERVICES**

### **Request for Proposal**

The Fallbrook Regional Health District (“District”) is seeking a qualified firm or firms to provide professional services to act as Construction Manager and provide oversight services to monitor the implementation of Community Health and Wellness Center Project (“Project”). The District is a public agency governed by a publicly elected five-member Board of Directors with a CEO who oversees the day-to-day operations.

This Request for Proposal (“RFP”) describes the required scope of services, minimum qualifications being sought, the Construction Manager selection process and the information that must be included in the proposal.

### **Fallbrook Regional Health District Community Health and Wellness Center Project Background and Description**

The Project includes the renovation of two (2) existing buildings and the redesign of the existing parcel to include a new outdoor event space, overflow parking, mediation garden, children’s play area, walking and exercise trails, new covered walkway that connects Buildings 1 and 2, landscaped areas and two (2) parking lots. The Project Architect is Taylor Design. At this time the District is in the Pre-Design and Schematic Design phases. This should allow the District to obtain a construction cost estimate prior to proceed with the subsequent design and construction phases.

### **Project Management Oversight**

The Construction Manager will represent the owner’s interest and provides oversight over the entire project directly for the District. The Construction Manager is expected to work with all parties to deliver the project on time, at or under budget, and to the owner’s expected standard of quality, scope, and function. The Construction Manager will report to the District Chief Executive Officer during course of the Project. The Construction Manager will be expected to provide monthly updates to the District Facilities Committee and to the District’s Board of Directors as needed.

The Construction Manager is expected to have the requisite education and experience to work with the District, the Project Architect, the general contractor, and other stakeholders to determine the best possible sequence of construction operations and develop a detailed schedule, while also establishing plans for project safety and security and helping the owner manage risk.

## **SUBMISSION REQUIREMENTS**

### **A. General**

1. Each submission shall be clearly marked “Construction Management Services for the Project and clearly demonstrate the breadth and depth of experience of the firm in the areas required. The qualifications shall show that the firm possesses the demonstrated skills and professional experience to perform the general functions of the Construction Manager and its experience in administering or overseeing state and federal capital projects.
2. Proposals become the property of the District and may be returned only at the District's option and at the Proposer's expense. Information, excluding Proposer's financial information, contained therein shall become public documents subject to the Public Records Act. The District shall not be liable for any expenses incurred by any firm to prepare or submit a proposal.
3. It is the District’s intention to select a firm that has demonstrated its competence and professional qualification to perform the services of Construction Management. The District reserves the right to cancel or revise the RFP and/or reject all or any proposals.
4. The following insurance coverage shall be required, as a minimum, by the District:
  - a. Professional Liability - \$1,000,000 annual aggregate
  - b. General Liability - \$1,000,000 annual aggregate
  - c. Workers’ Compensation per applicable state and federal laws
5. The District does not discriminate on the basis of race, color, national origin, ancestry, sex, age, religion, marital status, disability or sexual orientation in any of its policies, procedures or practices.

### **B. Submission Contents**

The following is a summary of the Submission Contents and a description of each.

1. Identification of the Proposer
  - a) Legal name and address of company.
  - b) Legal form of company (corporation, partnership, etc.).
  - c) Address, phone number, facsimile number, email address, website address, direct email address of the person(s) that will be primarily responsible for providing services for this proposal and for coordinating the RFP document.
  - d) California Business License Number.

2. Table of Contents
3. Executive Summary  
Provide an overview of the entire proposal describing the general approach or methodology the Proposer will use to meet the goals and fulfill the general functions required as a Construction Management.
4. Firm Information and Experience
  - a) Provide total number of professional staff employed by the firm.
  - b) Demonstrated experience in the management of construction projects.
  - c) The Proposer shall state the number of years the firm has conducted business. Proposer must have at least six (6) years experience in providing the outlined scope of required services for public clients and/or public projects.
5. Proposed Program Management Team
  - a) Identify key members that will be assigned to the Wellness Center Project support. Indicate the role of each individual. Include a resume reflecting the educational backgrounds as well as the skills and experience as construction management in design and construction phases. The Construction Manager must demonstrate an ability to be able to draw upon a multidisciplinary staff to address Construction Management services.
6. Project Specific Experience  
The Proposer shall provide a description of the three (3) most relevant construction management contracts held by the firm. Preference will be given to construction management services for public agencies within the last five years. Please include:
  - a. Role of the firm.
  - b. Dollar value of the program.
  - c. Project description including the name of the Construction Manager.
  - d. Staffing.
  - e. Relationship to client.
  - f. Contact name, position, entity name, telephone number, facsimile number, email address.
7. Proposed Methods to Accomplish the Work
8. Knowledge and Understanding of the Local Environment  
Explain the knowledge and understanding of working in San Diego County.
9. Fee Schedule  
Provide a listing of the proposed personnel, their classifications, and their hourly rates, including all overhead and profit.

**PRE SUBMITTAL ACTIVITIES**

**A. Questions Concerning Request for Qualifications**

All inquiries regarding this RFP should be directed to Rachel Mason, CEO at: [rmason@fallbrookhealth.org](mailto:rmason@fallbrookhealth.org). All questions will be responded to in writing to all respondents. Proposers are asked to contact Rachel Mason, CEO at: [rmason@fallbrookhealth.org](mailto:rmason@fallbrookhealth.org) Address: 138 S. Brandon Road, Fallbrook California 92028. Phone: 760-731-9187 about this RFP. Proposers are cautioned that contacts with individual members of the District Board of Directors is considered to be improper and should be avoided.

**B. Revision to the Request for Qualifications**

The District reserves the right to revise the RFP and/or to extend the date by which qualifications are due. The District reserves the right to waive any minor deviations, irregularities or informalities in any proposal to be considered for further review, at its discretion.

**C. Preparation**

Qualifications should be prepared in such a way as to provide straight forward and concise delineation of capabilities to satisfy the requirements of this RFP. Responses should emphasize the Proposer’s demonstrated capability to perform work of this type.

**D. Proposal due date**

All proposals must be received no later than September 16, 2022 at 5:00 pm. Please submit a signed copy of the proposal via email to: Rachel Mason CEO [rmason@fallbrookhealth.org](mailto:rmason@fallbrookhealth.org)

**SUBMISSION EVALUATION AND AWARD**

The submission will be evaluated based on its responsiveness to the RFP. Additionally, the Proposers will be rated on the following:

- Firm experience and construction management experience with public agency projects
- Successes in establishing effective working relationships between multi stakeholders; including relationships with management, architects, and contractors

**Qualifications Schedule/Milestones**

RFP release date;	<b>8/11/2022</b>
Deadline for questions submitted via email;	<b>9/8/2022</b>
Proposal due date;	<b>9/16/2022</b>
Finalist Interviews, if necessary;	<b>9/28/2022</b>
Recommendation to District Board;	<b>10/12/2022</b>

## **Interviews**

Respondents deemed qualified by the District may be required to participate in an interview with a Selection Committee established by the District. Interviews, if conducted by the Selection Committee, will generally consist of no more than fifteen (15) minutes for Respondents' presentation, followed by questions posed by the Selection Committee. Total time of each interview will not exceed one (1) hour. If requested by the Selection Committee, any Respondent invited to participate in the interview process shall have present at the interview its key personnel.

Based on the evaluation criteria defined, firms will be selected to present an oral interview after which a final selection will be made. Firms invited to interview will be selected based on the basis of the information provided in the RFP and the results of the District's research and evaluation.

## **SCOPE OF SERVICES**

### ***Basic Services:***

The Construction Manager "Basic Services" shall, at a minimum, consist of performing the duties enumerated below. The final scope of services will be included in the final Construction Management Agreement to be mutually negotiated by both parties. The following information is provided for reference only.

## **PRECONSTRUCTION AND CONSTRUCTION PHASES**

1. Collaborate with the Project Architect to determine the specifics of the Project, including the identification and administration of all tasks related to the development, design and completion of the Project to ensure all public funds are maximized and the Project is completed within the allocated scope, budget and schedule.
2. Assist in the preparation of the contract documents and the bidding process from the pre-bid, bid and award phases
3. Assist the Architect in obtaining permits and licenses from the appropriate authorities.
4. Assist in the determination of needed resources.
5. Work with the Architect and Contractor to develop and maintain a master schedule to manage the Project related activities and ensure that the Project will be completed as scheduled. The Construction Manager will update the master schedule (actual vs. baseline) and reissue the master program schedule to delineate the current conditions and revisions required by actual experience.

6. Develop and maintain a master budget that allows for project and program budgets and accounting. Assist the District in achieving the project budget requirements and other design parameters.
7. Review detailed estimates of all project construction cost and prepare for District approval. The Construction Manager will advise the District if it appears that the construction costs may exceed the project budget established by District and make recommendations for corrective action.
8. Review and approve all payment requests and change orders from the Contractor.
9. The Construction Manager shall attend and participate in meetings and conferences with the District Board of Directors, Board committees as required, Professional Consultants, and/or as otherwise necessary to discharge the Project Manager's obligations.
10. Organize and maintain all records, correspondences, contracts, research analyses and other documents related to design, bidding, and construction. Such documents may be subject to annual external performance and financial audits, as well as review by District management and Board of Directors.
11. Organize and maintain all records, correspondences, contracts, research analyses and other documents related to design, bidding, and construction. Such documents may be subject to annual external performance and financial audits, as well as review by a Citizens= Bond Oversight Committee.
12. Assist in the establishment of a Project safety and security plans