

Request for Proposals

Construction Manager at Risk (CMAR)



Town of Carlton Landing Nature Center Project

Prepared by:

Carlton Landing Enterprises, LLC

29 Water Street

Carlton Landing, Oklahoma 74425

Request for Proposal (RFP)

Construction Manager at Risk Services

Carlton Landing Enterprises is accepting written proposals from qualified construction management firms to provide construction management services for the Town of Carlton Landing Nature Center project.

Sealed RFP proposals shall be submitted no later than October 9, 2024.

ATTN:

Seth Gebhart, Carlton Landing, Director of Community Development

Jim Boohaker, Carlton Landing, Director of Development

Email:

seth@carltonlanding.com

jim@carltonlanding.com

Address:

Carlton Landing Enterprises

29 Water Street

Carlton Landing, Oklahoma 74425

Proposals shall be clearly defined in the email subject line or marked on the envelope as "Proposal for Town of Carlton Landing Nature Center Construction Manager at Risk Services".

A recommendation will be submitted to the Town of Carlton Landing Board of Trustees at their regular Town Meeting on October 19, 2024, at 8 AM.

I. PROJECT OVERVIEW

The purpose of this Request for Proposal (RFP) is to obtain proposals from qualified construction management firms (“the Firm”) interested in contracting with the Town of Carlton Landing (“the Town”) to provide desired services as outlined in this RFP.

II. BACKGROUND

The Town seeks a construction management firm to provide construction manager at risk services for the Carlton Landing Nature Center Building that is approximately 10,000 SF and serves as multi-functional space for educational programs, events, and community gatherings. The gathering hall located in the building shall seat no less than 300 occupants. The project is a single structure building a part of a future Nature Center complex build out including multiple other structures. A more detailed summary of the project is Referenced in Exhibit “A”, Schematic Design Package.

III. SCOPE OF SERVICES

The following scope of construction management services is intended to provide a general understanding of the Owner's expectations and is not all inclusive.

A. Pre-Construction Phase Services. The Preconstruction Services of the CMAR will begin with preparing costs estimates of the cost documents prepared by the A/E firm. The CMAR will be expected to actively participate in all design meetings, constructability reviews, and periodically provide cost estimation during the design process. The preconstruction phase will extend from the point of CMAR’s engagement through execution of the GMP amendment. More specifically, the CMAR shall provide at least the following preconstruction services:

1. Project Meetings: Attend and participate in Project meetings approximately weekly.
2. Cost Estimating: Provide ongoing cost estimating support to the Project Team throughout the Design Process. The cost estimates should be provided and refined per the schedule below:
 - a) 100% Schematic Design
 - b) 70% Design Development
 - c) 100% Design Development

- d) 35% Construction Documents
- e) 70% Construction Documents
- f) 100% Construction Documents

Note: Estimates must note assumptions made to prepare the estimate including clear definition of qualifications, allowances, contingency, and escalation factors. CMAR is to notify the A/E firm and the Owner of potential cost issues during the development of the drawings and specifications that may have an impact on the cost of the work and find resolution to keep the project in budget. Work collaboratively with Owner and A/E firm to develop alternatives to keep the Project Estimates within the Project Budget. GMP to be provided within 35 days of Construction Documents being completed. If value engineering is required after GMP is established, the contractor will compensate the owner for all A/E fees to make the required changes to the contract documents.

3. Construction Planning, Scheduling, and Lead Times: CMAR to work with the Owner and the A/E firm to develop a schedule for design activities to facilitate the Owner's schedule. A description of the anticipated tasks is as follows:
 - a) The CMAR will further develop the Project master schedule including integration of A/E firms design activities, municipal government approvals, preconstruction activities, procurement, construction activities, and construction activities including staging, delivery of materials, etc.
 - b) Further evaluation of all systems for constructability, economy, long-term performance for intended use and schedule impacts and provide recommendations consistent with cost and schedule goals.
 - c) Identify long lead items requiring early bid packages.
4. Value Engineering/Constructability/Cost Review: Provide ongoing value engineering and constructability reviews, including input regarding means and methods. Conduct a complete constructability and coordination review of the GMP package prior to finalizing the GMP amendment.
5. Guaranteed Maximum Price (GMP): Provide a proposed GMP at such time as the Owner, A/E firm, and CMAR determine that the drawings and specifications are sufficiently complete (within 35 days after Construction Documents are finalized). The GMP proposal will include:
 - a) List of allowances
 - b) List of contingencies

Each Estimate should include a list of assumptions and clarifications made by CMAR in the preparation of the GMP. This Agreement between the Town and CMAR will be evidenced by a contract amendment signed by the Parties. After the GMP Amendment is approved by the Owner, the CMAR may proceed with the following:

B. Construction Phase Services. The selected CMAR shall incorporate the following elements into construction phase activities, along with all typical tasks associated with managing a Project of this scope and scale or as otherwise required in the Project contract documents:

1. **Weekly Meetings:** Conduct weekly job site meetings that include subcontractors, owner's representatives, and the A/E firms to review open issues, schedule work, and resolve pending or upcoming issues. The CMAR will prepare written agenda in advance of each meeting. CMAR to maintain a list of action items with identification of responsible parties and due dates for each item. The CMAR will distribute written meeting minutes and action item lists within 48 hours of each meeting.
2. **Monthly Progress Billings and Status Reports:** Prepare a monthly report with each progress billing that details a project work status project work status report, buy-out status, pending issues, contingency status, schedule status, and project progress commentary with applicable job site photos.
3. **Procurement:** The CMAR will manage the bidding process, evaluate proposals, and interview contractors (along with the A/E firm and the Owner). The Project Team will utilize, by mutual agreement, the following method for awarding fixed-sum contracts to contractors for portions of the work: competitive bid in compliance with the Oklahoma Competitive Bidding Act. For those contracts to be awarded on a competitive bid basis, CMAR shall solicit a minimum of three (3) competitive, publicly advertised bids for each trade category. Multiple trade divisions will not be allowed in the same bid package.
4. The CMAR will provide a detailed solicitation report and award recommendation for the Owner's approval before executing subcontracts. All bids shall be tabulated and presented with recommendations.
5. **Contractor Selection Strategy/Bidders List:** Project Team strategy for selecting contractors/providers for all work reflected in Project documents is lowest responsible and most advantageous to Owner. Unless authorized by the

Owner, the CMAR shall solicit at a minimum three (3) subcontractors bids for each trade.

6. Self-Performed Work Proposals: For work that the CMAR proposes to self-perform, the CMAR is required to announce at pre-bid meetings that they intend to bid of specific bid packages. The CMAR will be required to submit its qualifications for self-performed work. If the Owner is satisfied with the CMAR's qualifications, CMAR will submit a sealed bid to the Owner and secure competitive bids from a minimum of three (3) other qualified subcontractors. The Owner will participate in opening and evaluating bids.

7. Cost Management: Provide on-going cost management throughout the completion of the construction documents and construction process:

8. Provide construction contingency and Project Budget updates at 100 percent complete CDs. During subcontractor buyout, the CMAR will track and log bid savings and bid losses on a construction contingency log. The CMAR will review the log with the Owners no less than biweekly. Trade contracts and the CMAR's records of line-item contingencies will be open book and shall upon request be shared with the Owner throughout the project.

9. The CMAR will inform the Owner of pending cost issues and potential change orders within five (5) business days of identifying potential issues. The CMAR will implement and maintain a current log of pending cost issues impacting the final cost of the Project and review the log no less than biweekly with the Owner. The CMAR will implement effective cost management control and potential alternatives to provide the Owner with the opportunity to make such decisions as required to keep the Project cost within the budget.

10. The CMAR should anticipate multiple bid packages. The CMAR is expected to provide draw down and cash flow projections for the project during construction and update as necessary. The CMAR will develop a strategy for issuing bid packages to facilitate an efficient construction schedule. The purpose is to utilize this bidding package strategy to gain the most advantageous issuing of documents and to minimize construction duration while allowing the bid packages to be completed efficiently. Multiple bid packages shall not be utilized for the purpose of avoiding any requirement to comply with the Oklahoma Competitive Bidding Act.

- 11.** Final Pre-Bid Review: Complete a final quality/coordination/constructability review of the Construction Documents prior to issuing plans and specifications to bidders.
- 12.** Schedule Management: Provide ongoing schedule management throughout the construction process. The CMAR will prepare and manage a logic-based critical path project schedule indicating key milestone events, dates, and responsibilities. The project schedule must include design efforts, preconstruction activities, procurement, and construction activities. The CMAR will provide regular monitoring of the actual progress versus the scheduled progress, identify any variances, and prepare a written action plan along with an updated schedule to maintain the scheduled completion dates. Prepare a three-week look-ahead schedule on a weekly basis to coordinate construction activities and to facilitate the project schedule.
- 13.** Quality Control: Complete construction of the work in strict accordance with the quality requirements established by the contract documents. All testing and independent inspection services required will be secured and paid for by the Owner. The CMAR will cooperate and coordinate with testing and inspection service agencies. The CMAR will be responsible for the cost of additional testing due to failed tests. The CMAR will develop an initial punch list for contractors in consultation with the Owner and its representative prior to a formal punch list issued by the A/E firm. The CMAR will ensure completion of initial punch list prior to the A/E firm's punch list walkthrough. The CMAR will complete a review of each bid package to ensure quality, coordination, and constructability prior to issuing bid documents to subcontractors.
- 14.** Safety Plan: The CMAR will implement a formal safety plan for the Project.
- 15.** As-Built Records: Maintain a record of as-builts conditions throughout construction which includes all field revisions. Submit as-built documents, operating and maintenance manuals and warranties to the Owner.
- 16.** Project Closeout: Provide a timely submission of operational/manuals completed punch lists, warranties, coordination of training, submission of as-built field documents, and financial close-out of the project. The CMAR will actively support and participate in commissioning activities and provide on-site operational training for all major building systems.

IV. OWNER/CMAR

A. The Owner intends to enter the AIA 133-2019 and AIA A201-2017, Standard Form of Agreement between Owner and Construction Manager as Constructor, as modified, with the selected firm. The RFP will be superseded by the Owner/CMAR Agreement and its related contract documents. Contract Provisions: The following is an abbreviated summary of a portion of the Owner's proposed contract provisions. The following is not intended to be exhaustive. The Owner reserves the right to modify the proposed provisions listed below:

1. Construction contingency use will require approval by the Owner
2. Once the GMP amendment is executed, the CMAR's fee and reimbursement for personnel shall not change unless the cumulative additive total of all change orders, both positive and negative, results in an increase of more than five (5) percent of the original GMP.
3. The CMAR will coordinate and integrate its work on the Project with the works of the Owner's separate contractors and consultants.

V. SELECTION SCHEDULE

A. Project Construction Timeline

1. The project is set to commence construction in the second or third quarter of 2025 and be complete in 2026.

B. RFP Timeline

1. RFP Issued: September 11, 2024
2. RFP Questions Submission Due: September 27, 2024
3. Proposals Due: October 9, 2024
4. Construction Managers Notified of Selection: October 21, 2024
5. Contracts Negotiated: October 21, 2024, through November 8, 2024

VI. SUBMISSION REQUIREMENTS

A. Submit three (3) paper copies and one (1) electronic PDF version of the proposal.

The submittal must contain the following information:

1. Cover Letter
2. Provide name and address of the firm(s) and Project contact person with address, telephone number, and email address. Indicate your acceptance of the requirements of this RFP and acknowledge receipt of any addenda, if applicable. Summarize your understanding of the required qualifications. Provide a statement indicating your ability to provide timely services for projects. Provide a one-page summary of the benefits you believe the Owner would receive from

selecting your firm. The cover letter must be signed by a fully authorized official of the firm.

3. Include an organizational chart showing your proposed staff for both the preconstruction and construction phases of the Project. Specifically identify project executive, project manager, and on-site day-to-day project superintendent for the construction phase, the availability of each person during the term of the project, and their history of working together on previous projects. Indicate experience of key team members working together on past similar projects. Provide resumes or a listing of information for each person included in your proposed project team. State the educational background of each individual, years of experience, length of employment with your firm, and previous project experience. For each person, list specific responsibilities on this project, experience on projects of similar sizes and types, specific qualifications applicable to this project, and current work assignments and availability for this project.

4. List other assignments your project manager will be handling during the period of assignment for the Project.

5. Provide references from three of their most recent projects and three architect/engineers references for the project manager, superintendent, and other key staff members.

VII. PROJECT APPROACH AND MANAGEMENT CAPABILITIES

A. Provide a description of your project approach and management capabilities as it relates to the following areas:

1. Working relationships: Commitment to building positive team working relationships

2. Pre-Construction Services: Describe your firm's approach to pre-construction services. Provide an estimate of the number of total anticipated hours for the assigned team prior to the Owner's acceptance of the GMP.

3. Cost Management: Describe the level of detail included in your cost estimates as various phases of design. Describe three examples that demonstrate your firm's creativity in value analysis/engineering and constructability reviews.

4. Change Management: Describe your change management process and reporting during construction.

5. Project Schedule: Submit an example overall Project Schedule for the key activities from the date of the notice to proceed through project construction.

6. Provide examples of your firm's capabilities to manage fast-track schedules with examples of quality control procedures, staffing, and reporting.
7. Safety: Provide your firm's approach to managing safety on construction projects.
8. Quality Control: Provide your firm's approach to quality control.
9. Communication and Project Management: Provide your firm's Project Management software, Procore or equivalent.

B. RELEVANT PROJECT EXPERIENCE

1. Describe at least three (3) projects ranging from \$1 million to \$10 million constructed within the past ten (10) years. Successful projects in the state market area are preferred. Indicate the following information for each project:
 2. Name of project, location, and construction date
 3. Name of project manager and superintendent responsible for project.
 4. Construction cost
 5. Type of service
 6. Preconstruction services provided
 7. Client and architect contact information. Include phone number and email address.

VIII. QUESTIONS AND ADDENDA

- A. Any questions concerning this RFP must be submitted via e-mail on or before September 27, 2024, at 1:00 PM to Seth Gebhart and Jim Boohaker, via email at seth@carltonlanding.com and jim@carltonlanding.com.
- B. Responses to questions will be issued via email to all firms. If deemed necessary, addenda to the RFP will be issued.

IX. SELECTION CRITERIA

- A. The selection committee will rely on the qualitative information contained and presented in the proposals, and reference checks in making the decision to select the most qualified firm to provide services for this project. Selection criteria will be based on:
 1. Experience of Project Team on similar projects, 50 Points
 2. Technical approach, 30 points
 3. References, 15 points
 4. Compliance with RFP criteria, 5 points
 5. Total points possible, 100 points

B. Upon receipt of all proposals, the firms will be ranked. Unless all firms are rejected, the Owner will commence negotiations of a fee for services with the highest-ranking firm.

C. If an agreement is not reached with the highest-ranking firm, the Owner will move to the second ranked firm or take such action as the owner deems appropriate.

D. Acceptance of a proposal shall be by written notice to the construction manager submitting the accepted proposal and by simultaneously notifying in writing the other construction managers that their proposals were not accepted.

X. SUBMISSION INFORMATION

A. Any questions concerning this RFP must be submitted via e-mail on or before September 27, 2024, at 1:00 PM to:

Seth Gebhart, Director of Community Development

or

Jim Boohaker, Director of Development

E-mail: seth@carltonlanding.com

E-mail: jim@carltonlanding.com

Responses to RFP shall be received by Carlton Landing Enterprises no later than 2:00 PM on October 9, 2024, by email or mail. If Proposals are sent via mail, they shall be mailed to:

Jim Boohaker, Carlton Landing, Director of Development

Carlton Landing Enterprises

29 Water Street

Carlton Landing, Oklahoma 74425

Proposal shall be marked "Proposal for Town of Carlton Landing Nature Center Project Construction Manager at Risk Services" and shall clearly identify the Firm submitting the proposal.

EXHIBIT "A" SCHEMATIC DESIGN PACKAGE

CARLTON

LANDING



NATURE CENTER SCHEMATIC PRESENTATION

AUGUST 23, 2024

SOMMER DESIGN STUDIOS
ARCHITECTURE & PLACE MAKING

CARLTON LANDING

NATURE CENTER

The site the Nature Center occupies in Carlton Landing is important as a transition from the urban to the natural. The building acts as a terminated vista, while also forming one of the two walls of the hardscaped plaza with the future chapel. It also one of the few buildings along the edge of Lake Eufaula in Carlton Landing. We have designed the building to be multisided as all elevations have an important role to play in forming the public realm.

In this pass we have included the larger context of the site to include the future wedding lawn and outdoor pavillions to the south of the Nature Center. We created an education lawn between the building and the outdoor classroom acting as a hinge point that can serve both the classroom and the Nature Center. Beyond the classroom there are three lawns that can be used for various sized events. The path to these lawns is terminated with a rectangular pavilion that can serve as shelter for events. A hardscaped terrace along the edge could be used as a dance floor. We are also proposing selective clearing of trees along the edge to help open up views from this area and from the rear porch of the nature center.

This scheme sub-divides the main hall into three spaces and allowing that to be shown in the massing the building, so instead of a single-gabled, barn-like massing, the spaces are turned towards the lake with two gable ends and a connector between them. This allows for multiple configurations: 3 separate, small halls; 2 unequal-sized halls; or 1 single space. The main entry hall is off of the shared plaza with the chapel. There is a porch along the eastern facade opening to the upper and lower terraces along with views to the water. The admin suite is located off the parking lot and is positioned along with the future classroom buildings to the west to create a courtyard space that leads to the side entrance and main plaza beyond.

Total H/C square footage for this plan is 9,488.

Total square footage under roof is 10,985.

KEY

A. NATURE CENTER	K. VIEW CORRIDOR
B. UPPER TERRACE	L. FUTURE TOWN SQUARE BUILDINGS
C. EDUCATION LAWN	M. FUTURE CHAPEL
D. OUTDOOR CLASSROOM	N. PLAZA
E. SMALL EVENT LAWN	P. TOWN SQUARE
F. LARGE EVENT LAWN	R. TREE BOSQUE PARKING
G. GARDEN ROOM	S. SERVICE YARD
H. DANCE TERRACE	T. TRASH
J. LOWER TERRACE	



SITE PLAN

CARLTON

LANDING



KEY

A. ENTRY/EXHIBIT	1,211 SQFT	E. REST ROOMS	270 SQFT EA.	J. ADMIN	873 SQFT T.
B. HALL	4,308 SQFT	F. STORAGE	496 SQFT T.	K. CORRIDOR	490 SQFT
C. PORCH	2,559 SQFT	G. ELEC/MECH	58 SQFT		
D. CLASSROOM	800 SQFT	H. KITCHEN	876 SQFT	TOTAL BUILDING SQFT:	10,391 HC

Pass 3

12,950 TOTAL

CARLTON LANDING



OVERALL NORTH ELEVATION



OVERALL EAST ELEVATION

CARLTON LANDING



SERVICE YARD EDUCATION
LAWN UPPER
TERR. LOWER
TERR.

OVERALL SOUTH ELEVATION

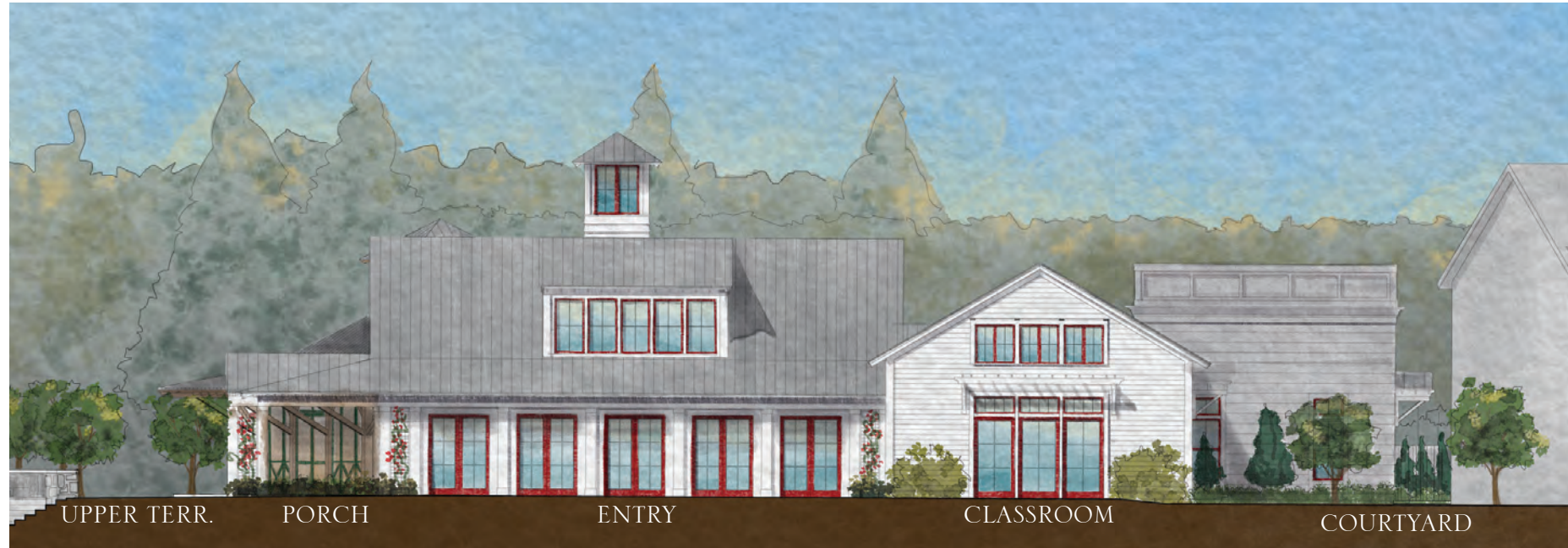


FUTURE CHAPEL PLAZA SIDE
ENTRY ADMIN SERVICE COURT GARDEN
ROOM

OVERALL WEST ELEVATION

CARLTON

LANDING



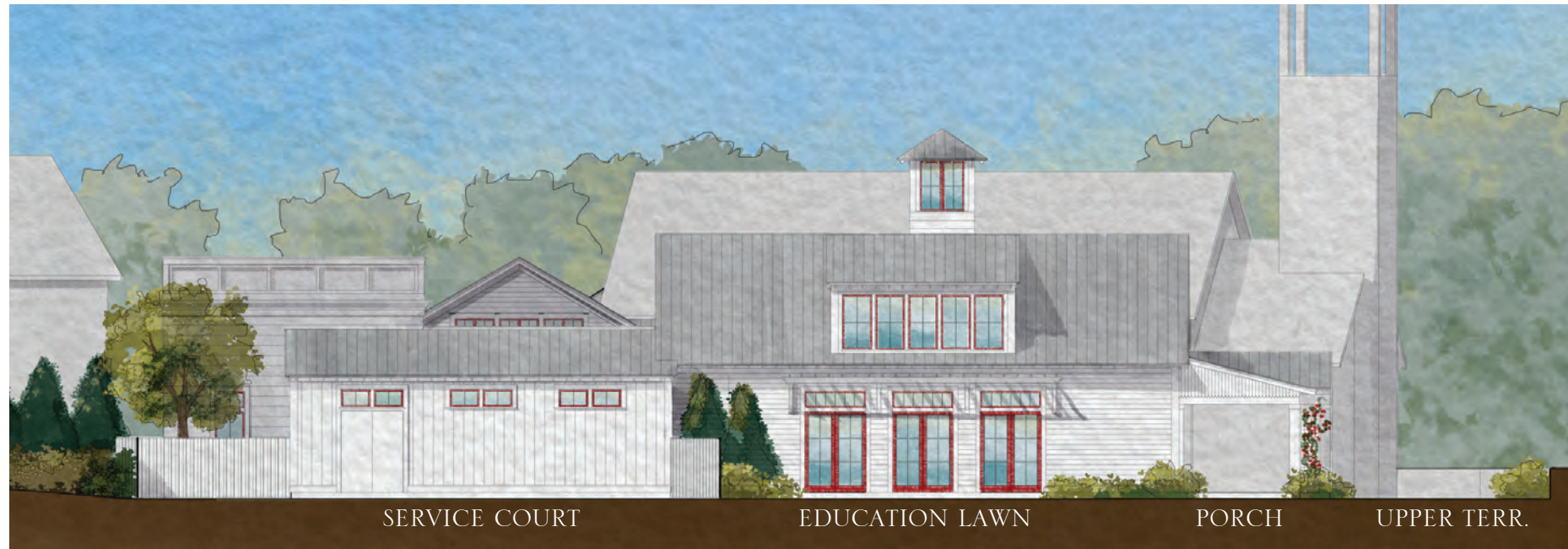
NORTH ELEVATION



EAST ELEVATION

CARLTON

LANDING



SOUTH ELEVATION



AXON



WEST ELEVATION



AXON

CARLTON LANDING



PERSPECTIVE TOWARDS NATURE CENTER ENTRY



PERSPECTIVE TOWARDS COURTYARD AND ADMIN



PERSPECTIVE TOWARDS ADMIN AND COURTYARD



PERSPECTIVE TOWARDS GARDEN LAWNS



PERSPECTIVE TOWARDS NATURE CENTER



PERSPECTIVE TOWARDS OUTDOOR CLASSROOM

NATURE CENTER

Lot #

CARLTON LANDING, OK



SOMMER
DESIGN
STUDIOS

ARCHITECTURE AND
PLACEMAKING

10227 Warwick Blvd. Hilton Village, VA 23601
678 357-5057

It is the responsibility of the contractor to perform the following before beginning any construction:

1. Contractor or builder must verify all dimensions prior to any construction.
2. Contractor or builder must comply with all local building codes and ordinances in the area where this project is to be constructed.
3. Contractor or builder must verify the existing load bearing capacity of the soil at the construction site. Load bearing capacity of the soil at the construction site must meet the minimum acceptable bearing capacity as indicated in the construction documents.

If any of the above conditions cannot be met, Sommer Design Studios, LLC, must be notified for the necessary alterations to ensure compliance prior to any additional construction in the non-compliant areas. No changes or alterations are to be made to this project or to affect the structural integrity of the project as detailed in the construction documents without prior written approval from Sommer Design Studios, LLC.

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DRAWN BY:
NMB
CHECKED BY:
JPS

NOT FOR CONSTRUCTION
JULY 2024

RELEASES:

KEY & MATERIAL LEGEND	INDEX TO DRAWINGS	SQUARE FOOTAGE																																																																																						
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NATURE
CENTER

CARLTON LANDING, OK

A0.01

COVER

SOMMER DESIGN STUDIOS

ARCHITECTURE AND
PLACEMAKING

10227 Warwick Blvd. Hilton Village, VA 23601
678 357-5037

It is the responsibility of the contractor to perform the following before beginning any construction:

1. Contractor or builder must verify all dimensions prior to any construction.
2. Contractor or builder must comply with all local building codes and ordinances in the area where this project is to be constructed.
3. Contractor or builder must verify the existing load bearing capacity of the soil at the construction site. Load bearing capacity of the soil at the construction site must meet the minimum acceptable bearing capacity as indicated in the construction documents.

If any of the above conditions cannot be met, Sommer Design Studios, LLC, must be notified for the necessary alterations to ensure compliance prior to any additional construction in the non-compliant areas. No changes or alterations are to be made to this project or to affect the structural integrity of the project as detailed in the construction documents without prior written approval from Sommer Design Studios, LLC.

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NOT FOR CONSTRUCTION
JULY 2024

RELEASES:



NATURE CENTER

CARLTON LANDING, OK

A1.01

SITE PLAN

A SITE PLAN

Scale: 1/16" = 1'-0"

SOMMER DESIGN STUDIOS

ARCHITECTURE AND
PLACEMAKING

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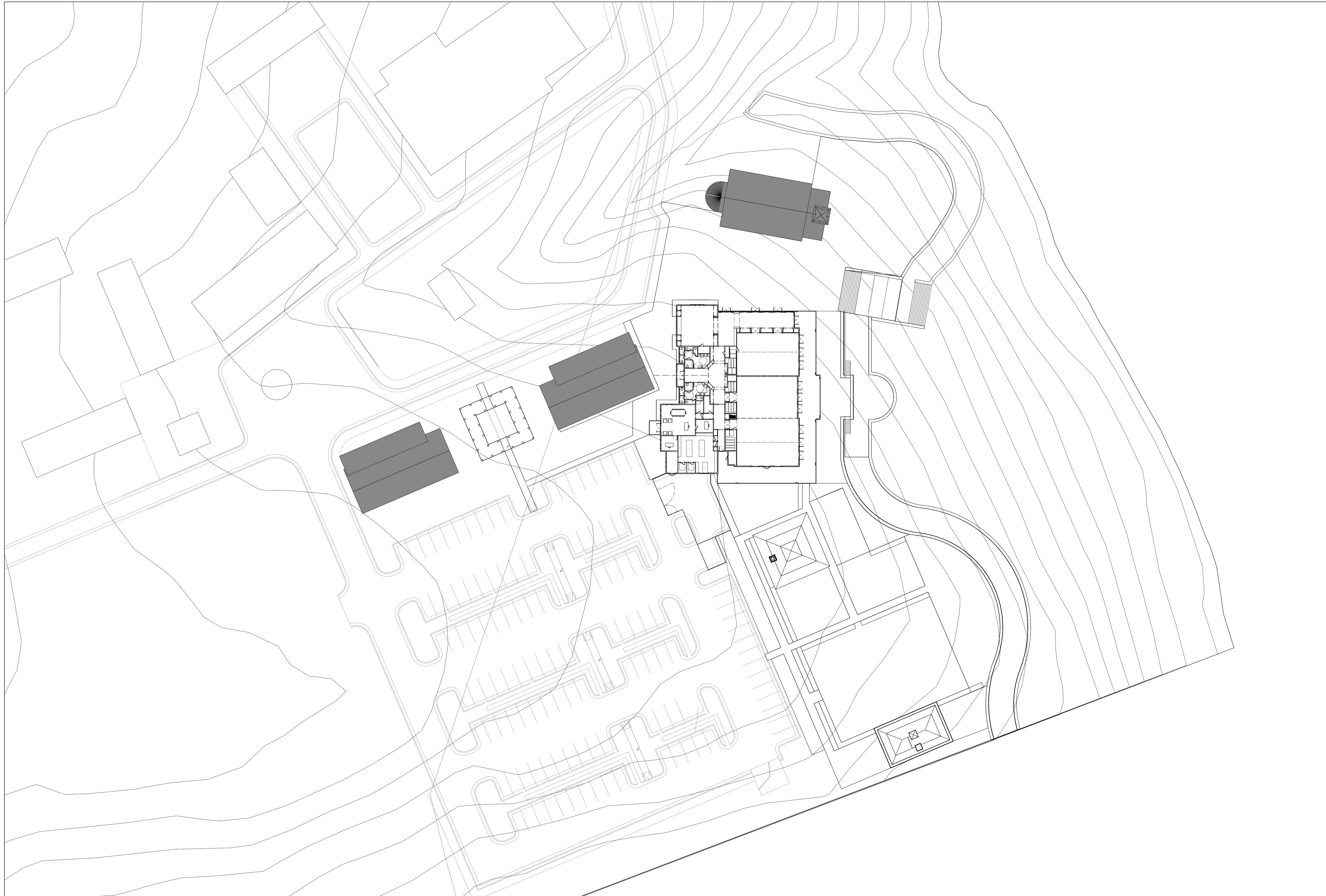
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RELEASES:



NATURE CENTER

CARLTON LANDING, OK

A1.02

SITE PLAN

A SITE PLAN

Scale: 1/32" = 1'-0"

SOMMER DESIGN STUDIOS

ARCHITECTURE AND
PLACEMAKING

10227 Warwick Blvd. Hilton Village, VA 23601
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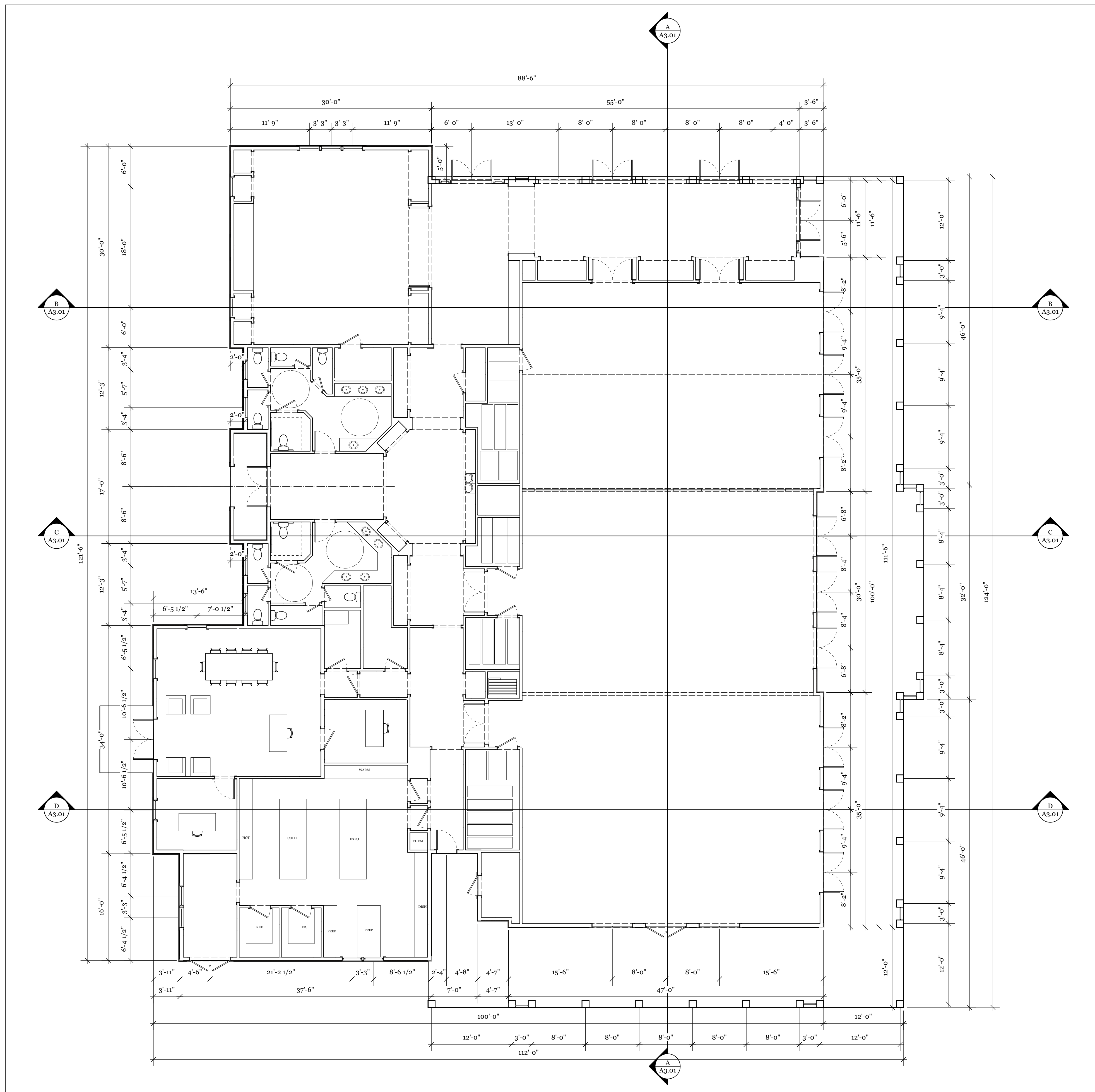
RELEASES:

NATURE CENTER

CARLTON LANDING, OK

A1.03

FLOOR PLANS



A FIRST FLOOR

Scale: 1/8" = 1'-0"

SOMMER DESIGN STUDIOS

ARCHITECTURE AND
PLACEMAKING

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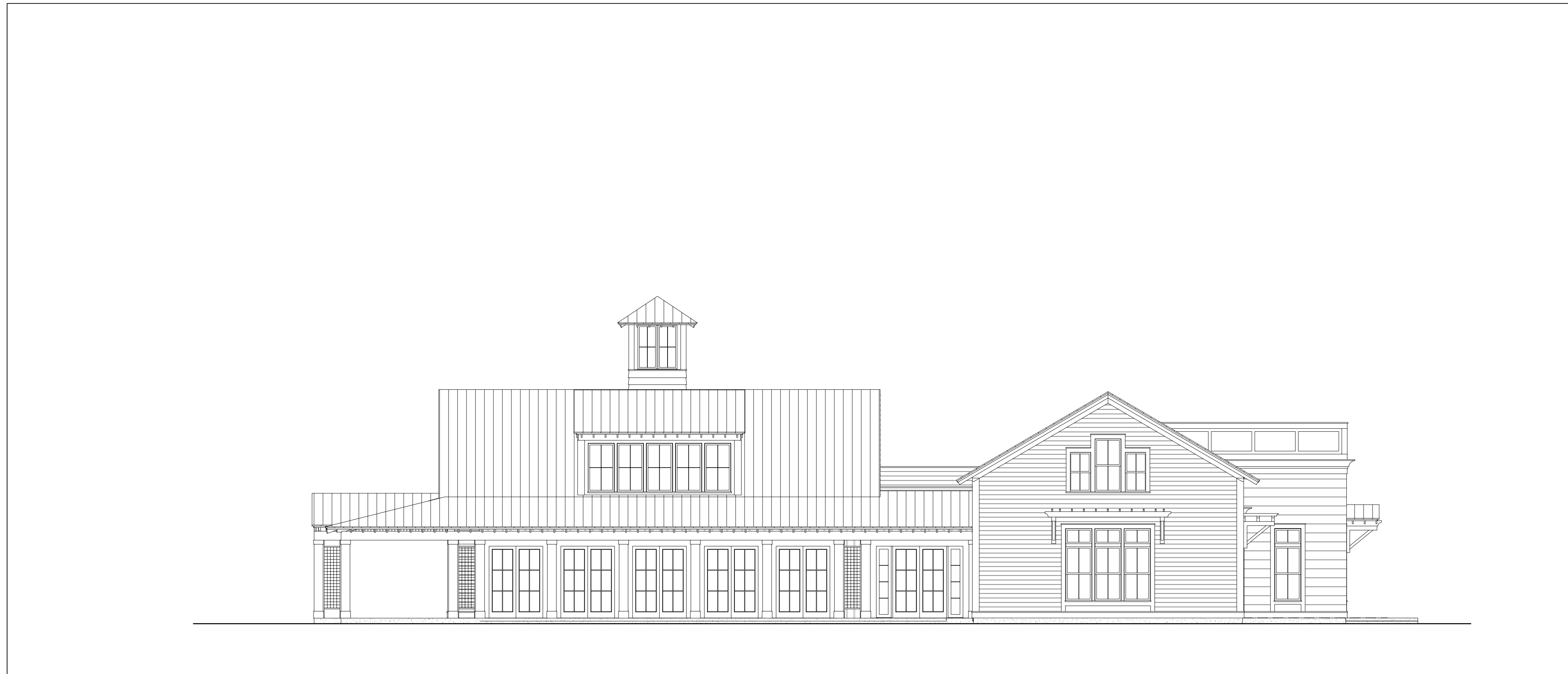
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RELEASES:



A PLAZA ELEVATION

Scale: 1/8" = 1'-0"



B PRESERVE ELEVATION

Scale: 1/8" = 1'-0"

NATURE CENTER

CARLTON LANDING, OK

A2.01

ELEVATIONS

SOMMER DESIGN STUDIOS

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JULY 2024

RELEASES:



A LAWN ELEVATION

Scale: 1/8" = 1'-0"



B PARKING ELEVATION

Scale: 1/8" = 1'-0"

NATURE CENTER

CARLTON LANDING, OK

A2.02

ELEVATIONS

SOMMER DESIGN STUDIOS

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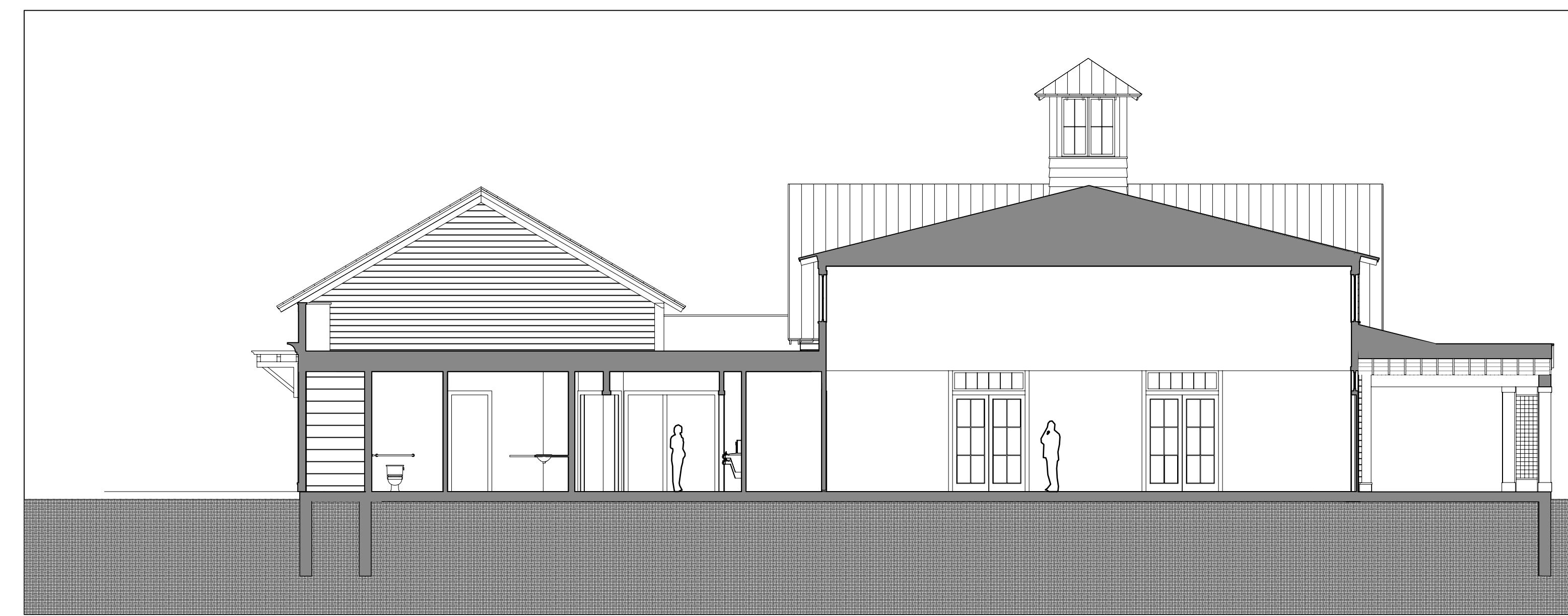
A SECTION

Scale: 1/8" = 1'-0"



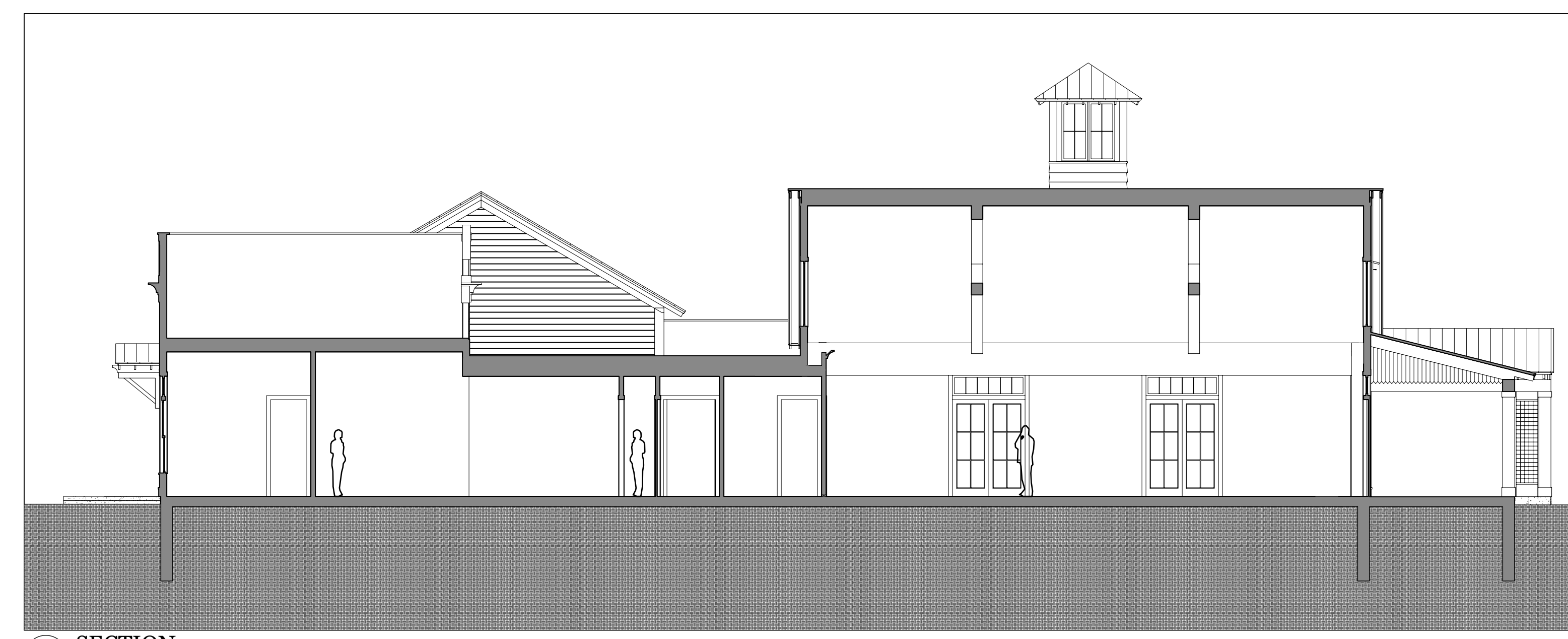
B SECTION

Scale: 1/8" = 1'-0"



C SECTION

Scale: 1/8" = 1'-0"



D SECTION

Scale: 1/8" = 1'-0"

NATURE CENTER

CARLTON LANDING, OK

A3.01

SECTIONS