

Request for Qualifications and Proposal Owner's Representative Services Kansas City Zoo, New Orangutan Exhibit



October 11, 2013

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Owner's Representative Services
Kansas City Zoo, New Orangutan Exhibit

Owner: Friends of the Zoo, Inc.
6800 Zoo Drive
Kansas City, MO 64132

INTRODUCTION

The Friends of the Zoo (the "Owner") seek to retain a qualified Owner's Representative to assist the owner with design and construction oversight services for a new Orangutan Exhibit at the Kansas City Zoo. The purpose of this Request for Qualification and Proposal (RFQ/P) is to obtain relevant information, credentials, qualifications and experience from interested firms to allow the Owner to select a qualified Owner's Representative for the project.

We are anticipating a schedule for design and construction of approximately 18 months, and the goal is to open the new exhibit no later than the spring of 2015. An RFP has also been issued for the architect/engineer for the project. A third RFP for a Construction Manager at Risk will be issued in the near future.

GENERAL PROJECT INFORMATION

1. The Kansas City Zoo is located within Swope Park at 6800 Zoo Drive in Kansas City, Missouri. Swope Park and the Kansas City Zoo are owned by The City of Kansas City, Missouri (the "City"), and operated by the Friends of the Zoo.
2. The site for the new Orangutan Exhibit is located on the Zoo property between the existing Polar Bear Exhibit and the existing Orangutan Exhibit, and directly adjacent to the existing Orangutan Exhibit.
3. The new Exhibit will be approximately 8,000 to 10,000 square feet. The exhibit will be an outdoor exhibit, but must be fully enclosed by a containment screen/fencing.
4. The new Exhibit will accommodate approximately 8 Orangutans.
5. The complete budget for this project is \$5,000,000, "all-in." In other words, the \$5 million budget includes all professional design fees, specialty consultant fees, permitting fees, reimbursable expenses, Furniture Fixtures and Equipment (FF&E), construction costs, and owner's administrative costs and contingency.
6. The desired date for Grand Opening of this new Exhibit is May 1, 2015.
7. The primary goal of this project is to create outdoor exhibit space for orangutans; more than one yard is desired. The outdoor yards will connect to the existing holding building. A secure transfer system will need to connect the exhibits to the building. The outdoor exhibits need to create a habitat that provides the opportunity for terrestrial activities, including a water feature. Naturalistic climbing structures will need to be provided to allow the orangutans sufficient climbing opportunities. Realistic nesting areas are to be provided. The exhibits should have a naturalistic appearance. Orangutan containment can be achieved with open topped yards or by enclosing with a proper mesh material. It may be possible to add additional smaller exhibits in this outdoor space.
8. A re-purposing of the current indoor display area is desired. Options must be explored as to the best way to create a desirable animal viewing opportunity. It would be preferable to consider display orangutans but other species would be considered. This display is current difficult to view through the existing glass and inadequate lighting. This space will also need a naturalistic look to it.

SUBMITTAL REQUIREMENTS:

On or before October 22, 2013, at 4:00 PM CDT, firms should submit their response to this RFQ/P to the following:

Friends of the Zoo
6800 Zoo Drive
Kansas City, MO 64132
Attention: Linda Falk, CFO

Respondents are to submit an electronic copy and four bound copies of their qualifications. Selection schedule is as follows:

Request for Qualifications Date of Issue	October 11, 2013
Owner's Representative Phase 1 Submittal Due	October 22, 2013
Owner Review of Proposals/Short-List Candidates	October 22 - October 25, 2013
OR Phase 2 submittal Due	October 30, 2013
Possible Interview of Short-Listed OR Candidates	Week of November 4, 2013
OR Selection/Notification	November 8, 2013

Questions concerning submissions must be issued in writing via e-mail to Linda Falk at Friends of the Zoo:
LindaFalk@fotzkc.org

This RFQ/P consists of a two-phase selection process:

1. The first phase consists of the Owner receiving a Qualification package from interested Owner's Representative firms. The Owner's selection committee will review the qualification submittals from each OR firm to identify a short list of firms.
2. The second phase will involve the shortlisted OR firms submitting project specific Proposals, which will include Fees, Billing Rates, and other project costs. Subsequently, shortlisted firms may be asked to participate in an interview with the Owner's selection committee, or the Owner may elect to select a qualified OR firm based on the qualifications and proposals submitted. If interviews are conducted, each OR firm will discuss their credentials, Diversity Plan management experience, their experience with similar project types, LEED® and sustainability experience and expertise, their team's approach to cost and budget control, and any other relevant topics.

It is the intent of the Owner to enter into a lump sum fixed fee with the successful Owner's Representative candidate.

Phase 1:

Please submit the following. Please keep responses concise:

A. Cover Letter – 1 pages

B. Philosophy Statement and Approach – 2 pages

1. Provide a statement of your firm's approach to the development management process and your management approach for schedule and cost control.
2. Outline your approach to QA/QC.

C. Project Staff – 3 pages

1. Provide an organization chart for your project team and resumes for those individuals who will be assigned to the project, including the Principal-in-Charge, Project Manager, etc.

2. Please confirm that the proposed personnel would be available throughout the duration of the project, and address your company's capacity in the current marketplace and your pending backlog.

D. Experience – 5 pages

1. Submit three to five projects that best represent the capability of your firm to provide similar Owner's Representative services.
2. For each project, please include the project name, size, cost, project manager, and a contact number of an owner reference.

Phase 2:

After review of Phase 1 submittals, a select list of best-qualified firms will be asked to submit additional information. The Phase 2 submission will include, at a minimum, the following:

E. Compensation Plan

1. The proposed compensation plan should include the OR fee, indicated as a lump sum total for Owner's Representative services from initial design through construction.
2. Provide hourly billing rates for all personal that may work on the project. Hourly billing rates will be used as the basis for negotiating services outside of the OR Scope of Services.
3. Provide a staffing plan with staff assignments and estimated hours throughout each phase of the project.
4. Submit other information as may be requested at the time of notification of selection to the select list of OR firms.
5. Submit your compensation plan in a sealed envelope, as noted below:

"Compensation Proposal: Kansas City Zoo – New Orangutan Facility"
[Name of OR Firm]

To:
Friends of the Zoo, Inc.
6800 Zoo Drive
Kansas City, MO 64132
Attn: Ms. Linda Falk

F. Diversity Plan Experience

Pursuant to the Friends of the Zoo commitment to diversity, and based on the Memorandum of Understanding (MOU) between FOTZ and Jackson County, Missouri, the selected OR will be responsible for overseeing the implementation of the DIVERSITY POLICY AND PROGRAM GOALS established for all Kansas City Missouri Zoo projects (see attachment). Per the MOU, the minimum workforce goals for employment of minorities, women, and local businesses for design, procurement, development, and construction of capital projects shall be 22% for MBEs, 8% for WBEs, and 15% for LBEs. These percentage goals are not to be construed separately for a business that is certified in more than one category (no single firm may be counted towards fulfilling goals of more than one category). Submit information regarding your firms' experience with overseeing and achieving diversity goals on similar projects. Although there are not specific diversity goals for the Owner's Representative Scope of Work, submit information on your firms' qualification as an MBE, WBE, or LBE; or information about any partner, vendor, or supplier that is included in your proposal.

OWNER'S REPRESENTATIVE SCOPE OF SERVICES:

The selected Owner's Representative scope for the project will include the following services:

G. General Services

Owner's Representative (OR), in general, shall have primary management responsibility for the project and shall coordinate all Project matters including budget, schedule and scope management.

OR shall maintain an organized filing system for all Project documents and records. At Project completion, OR will deliver the document(s) and record(s) to the Owner at the end of the Term or at any time during the Term at the Owner's request.

OR shall schedule, attend, conduct, and assist the Owner at all Project meetings, and provide minutes from such meetings prepared by the OR if not recorded by the Architect or Construction Manager. OR shall review for accuracy the minutes of such meetings prepared by others and clarify, amend and report any discrepancies affecting the Project.

OR shall furnish monthly reports containing (a) the status of the Project; (b) a comparison of the Project budget to costs incurred; (c) a comparison of the Project schedule to the work actually completed; (d) any revisions to the Project schedule or Project budget; (e) a summary of change orders proposed or approved; (f) a list of all outstanding issues requiring action or approval by Owner; (g) the status of any governmental approvals required for the Project; and (h) any other reports concerning the Project activities as Owner may reasonably request.

OR shall provide accounting services for the Project, including but not limited to (a) tracking the Project budget; (b) preparing monthly variance reports; (c) monthly services related to assembling, reviewing and forwarding to Owner for payment the invoices from the Architect, other consultants, and other project vendors; and (d) reviewing and coordinating the payment of the Construction Manager's applications for payment.

OR shall be available for questions and follow up by telephone or site meetings with Owner within a reasonable time period to ensure no disruption to the Owner's ability to make decisions and take actions in order to maintain the project schedule.

H. Pre-Development Services

Owner's Representative (OR) shall:

Assist Owner in the compliance with the Owner's standard contracting protocol, including applicable local, state and/or federal requirements, if any.

Provide leadership to each selected vendor on all matters relating to the planning, design, governmental approvals, construction, and other activities necessary to complete the Project. Owner shall select the Owner's Representative and Architect based on a qualification-based selection procedure, and will utilize a bidding procedure for the selection of the CM with the consultation and advice of the Owner's Representative.

Assist the Owner in reviewing the preliminary estimated schedule for completion of the construction of the Project, including, without limitation, the various major activities to be undertaken in connection with the Project and the approximate timing of the commencement and completion of such activities

Assist Owner in managing a Project budget based on a preliminary estimate of Project costs, including Owner's internal cost.

Manage the Project schedule and Project budget to manage cash flow, to maximize value, keep the work progressing in a logical manner, and avoid or mitigate interruptions of design and construction.

Assist the Owner regarding all site evaluation activities, including site approvals by government agencies, obtaining and evaluating any necessary soil studies survey and topographical survey, and advise owner regarding the provision of adequate utility services and access thereto.

Schedule and attend regular meetings with the Architect related to the completion of the design.

Review and comment on the drawings and specifications for the Project and assist the Owner in the evaluation and recommendation of appropriate design alternatives in light of the Owner's program, budget, and schedule.

Review the estimated project costs for designing and constructing the Project, and advise the owner on potential additional budget items and possible Value Engineering options

Recommend modifications to the design, budget, schedule and program, for final decisions by Owner.

Attend no less than bi-weekly project meetings during design phase.

Review documents for constructability and for value engineering opportunities, and report accordingly.

Review and advise on the site access and logistics plan prepared by CM for approval by owner.

Review bid documents prepared by the architect and CM, facilitate pre-bid meetings, and review all bids secured by the CM for all subcontractor work for complete construction services. The CM will hold all subcontracts under the CM agreement.

I. Construction Phase Services

Owner's Representative (OR) shall:

Represent the Owner in its communications with the Architect, CM, and Consultant(s); schedule, attend, and/or conduct progress meetings and on-site meetings to review construction progress.

Advise the Owner concerning, and recommend for approval as appropriate, all change orders.

Oversee and review in detail as necessary all submittals and requests for information.

Advise Owner concerning the necessity for and cost of change orders, and negotiate on Owner's behalf regarding all change orders with CM.

Review applications for payment by the CM, review certificates for payment certified by Architect and make written recommendations to Owner concerning payment.

Direct CM (and others, where appropriate) to prepare and update a critical path schedule for completion of the applicable work. In the event of delays impacting the critical path schedule, Owner's Representative shall make recommendations to Owner for corrective action by CM.

Assist in negotiations among the Project Team, and as applicable, the utility companies concerning the installation of electric, sewer, and water, gas, and telephone facilities required for the Project.

Oversee the Architect's review and approval of shop drawings, product data and other submittals by CM.

Review and advise the Owner concerning the adequacy of the CM's personnel and equipment, and the availability of materials and supplies to meet the project schedule.

Recommend courses of action to the Owner when any requirements of any Project construction contract are not being fulfilled, or when CM falls behind in its schedule, and communicate recommendations, as directed by the Owner, to CM on behalf of the Owner.

Review independent test reports and require, when appropriate, additional inspection or testing of the work in accordance with the provisions of the contract documents. Notify the Owner of deficiencies in the work and advise

the Owner of projected consequences of such default, and make recommendations to Owner with respect thereto. Reject work which does not conform to the requirements of the applicable contract documents.

Attend on-site review of the Project to confirm substantial and final completion of the construction of the Project.

At substantial completion by CM, monitor the Architect in its inspection of the work and preparation of a detailed "punch list" specifying any items which require completion, installation, correction or repair. Consult with Owner and/or Architect in connection with recommendations for the rejection and replacement of all nonconforming work.

Obtain from CM record drawings or, if required by the applicable Project construction contract, "as-built" drawings, per provisions of the construction contract.

Together with the Architect, Commissioning Agent, and Owner, monitor and observe the testing and start-up of all utilities, systems, and equipment for the Project.

Complete the final close-out of the Project by causing the CM to obtain all government approvals required for the legal use and occupancy of the Project and obtaining from the CM all warranties, guarantees, bonds, insurance certificates, installation manuals, and other items required pursuant to the Project construction contracts. Obtain all affidavits, waivers, and releases the CM/Sub-contractors are required to provide pursuant to the Project construction contract. Resolve any and all claims by CM or Architect, and all back charge claims that Owner may assert against Architect or CM.

Assist with any legal proceedings instituted by Owner and/or Architect or CM, and represent Owner at meetings and/or inspections scheduled by Owner to resolve problems relating to design, physical condition or operation of the Project. Preparing for, attending, or testifying in any legal proceedings will represent additional services and may require an equitable adjustment in the compensation.

Coordinate the purchase and installation of Owner-Furnished furniture, fixtures and equipment.

Assist the Owner with the coordination of the Project commissioning process.

J. Proposal Evaluation Criteria

The following is a general summary of evaluation criteria to be used for selecting the Owner's Representative:

1. The firm's and individual team members' demonstrated experience with projects of similar size, scope, and complexity.
2. The firm's demonstrated ability to manage projects with public funding and committee input and involvement.
3. The firm's demonstrated ability to meet diversity plan goals on similar projects.
4. The firm's demonstrated ability to deliver projects on time and on budget.
5. The firms' project approach and management philosophy.