



**Request for Proposal (RFP)
San Mateo County Community College District (SMCCCD)
Construction Management (CM) Services for the
Capital Improvement Program Phase 3 (CIP3)**

**Department of General Services
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San Mateo, California 94402
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RFP #86706

January 30, 2015

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I. SOLICITATION OF PROPOSALS FROM SELECT PRE-QUALIFIED CONSULTANTS.

The San Mateo County Community College District (SMCCD) prequalifies its construction and other professional consultants. The District is requesting proposals from the following prequalified consultants to provide Construction Management (CM) services for the third phase of its Capital Improvement Program (CIP3). Those prequalified consultants interested in submitting a response to this Proposal must submit an email notification indicating their intent to respond to districtbids@smccd.edu, with the following text in the subject line: 'RFP #86706 CM Services'. The Professional Services Agreement will be based upon Time and Materials with a Stipulated Not to Exceed Fee structure, and evaluated on a best-value selection criteria.

- AECOM Construction Services
- Cambridge Construction Management
- Cumming Corporation
- DRB Associates
- Gleeds USA Inc.
- Harris & Associates
- JKL Construction Services, Inc.
- O'Connor Construction Management, Inc.
- Parsons Brinckerhoff Construction Services, Inc.
- Program Management Integration LLC
- Swinerton Management and Consulting
- Vanir Construction Management, Inc.

For consideration consultants must submit electronic proposals to the District at districtbids@smccd.edu with the following text in the subject line: 'Response to RFP #86706' no later than February 26, 2015 at 2:00PM PST.

II. PURPOSE AND DISTRICT BACKGROUND INFORMATION

The following information is provided as a summary of the intent of this RFP. Consultants are advised to read the entire RFP carefully and review the specific proposal requirements enumerated in each section of the RFP.

In preparation for the implementation of CIP3, SMCCCD (“District”) is seeking an innovative, effective, proactive Construction Management firm to assist the District in the execution of its Capital Improvement Program. The successful firm shall be qualified to provide Construction Management (CM) services and will commence work as soon as is practical following Notice of Award.

This RFP specifically refers to CM Services, as the District intends to perform Program level or strategic management utilizing in-house staff and selected specific sub-consultants, such as scheduling and cost estimating consultants. The District intends to provide a web-based program and project management software system. The District shall provide licenses and training for said software system.

The selected CM Firm shall nonetheless be required to participate in Program level strategic planning activities, by working collaboratively with District staff and other consultants. This collaboration will include but will not be limited to participating in the development of the Program schedule by the program scheduling consultant, confirmation of project budgets with the cost-estimator, and consideration and selection of individual project delivery methods.

The District has developed a preliminary project list, conceptual project and construction budgets, and a preliminary Program schedule, all of which are subject to validation and refinement by the District in conjunction with the District’s scheduling and cost-estimating consultants and the selected CM firm. The current projected overall value of the program is approximately \$473 Million dollars, and the anticipated duration of the program is seven (7) years. This estimated amount and duration may change as individual project budgets, schedules, and delivery methods are determined. Preliminary project lists, budgets and schedules shall be provided as part of this RFP to facilitate proposal development.

The District intends to select one (1) CM Firm to provide services at all three (3) college campuses and the District Office for the duration of CIP3. CM services shall be priced and contracted on a time and materials basis with a stipulated Not-to-Exceed amount per project / assignment. The District shall issue Requests for Proposal (RFP’s) to the selected CM Firm for individual projects or assignments on an as-needed basis when the budgets, schedules and delivery methods for each project or assignment are sufficiently developed to allow for reasonable development of a stipulated Not-to-Exceed (NTE) amount. The District may elect to manage design phase activities for certain projects or assignments directly with an in-house project manager, or to assign design phase responsibilities to the CM Firm. The District will utilize a responsibility matrix (included as Appendix A) to define the required scope of each individual assignment.

Upon issuance of Notice of Award, the District intends to issue an initial contract to the selected CM Firm for Program strategic level planning support services with a stipulated Not-to-Exceed amount of fifty thousand dollars (\$50,000).

Approximately 40,000 students throughout San Mateo County attend one of the three Colleges of the San Mateo County Community College District: Cañada College in Redwood City, College of San Mateo, and Skyline College in San Bruno. Although the boundaries of the San Mateo County Community College District are the same as those of the County, the District's Board of Trustees is independent of County government. The five-member Board of Trustees "Board" is elected at large by County voters every four (4) years and governs one of the largest two-year college systems in California.

Consultants are encouraged to visit the District's website and view the [District Fact Book](#) for more information about the Colleges and students.

In November 2014, the San Mateo County voters approved Measure H, a General Obligation Bond totaling \$388 million dollars. At the three (3) colleges, the total amount for new construction is projected at approximately \$286 million dollars with renovation projects at approximately \$56 million dollars and improvements and modifications at approximately \$46 million dollars.

The District's intent is to use various alternative delivery methods to complete the Capital Improvement Program. These delivery methods are expected to include Lease-Leaseback, Design Build, Design Bid Build and other delivery methods as appropriate.

III. PROPOSAL DATES AND TIMEFRAMES

(District reserves the right to change or alter times and activities at its sole discretion):

Issuance of Request for Proposal (RFP) to select vendors	January 30, 2015
Deadline for Consultants to submit questions	February 19, 2015
Deadline for Consultants to submit proposals	February 26, 2015; 2:00 PM PST
Proposal review and Consultant Interviews	March 9 through March 13, 2015
Notice of Award	March 26, 2015

IV. PROPOSAL INSTRUCTIONS AND REQUIREMENTS

Consultants interested in submitting a response to this Proposal must submit an email notification indicating their intent to respond to districtbids@smccd.edu, with the following text in the subject line: 'RFP #86706 CM Services'

1. General

Consultants must comply with the provisions of these instructions for completion and submission of the Proposal ("Proposal Instructions and Requirements"). The Consultant shall address the entire proposal. The failure of a Consultant to comply with the Proposal Instructions and Requirements may result in rejection of the Consultant's Proposal for non-responsiveness.

2. Consultant Qualifications

Only Proposals submitted by Consultants with the relevant experience, qualifications and capacity to meet the requirements set by SMCCCD and included on the District's published list of pre-qualified professional consultants will be accepted. A "responsible Consultant" is a Consultant which has the financial resources, personnel, facilities, integrity, and overall capacity to consummate the contract successfully. A "responsible Proposal" is a Proposal which meets all terms, conditions and specifications of the Request for Proposal.

3. Consultant Interviews

Selected Consultants may be asked to make an in-person presentation to the District. Presentation dates are anticipated to occur between March 9 and March 13, 2015.

4. Preparation of Proposal

- a. Submission of Proposal:** Consultants interested in this opportunity must submit an electronic copy of their proposal to:

Districtbids@smccd.edu

With the following text in the 'Subject' Line: Response to RFP #86706

The Proposal must be received *on or before 2:00pm PST on February 26, 2015*.

Failure to meet the deadline will result in disqualification of the proposal without review.

- b. Proposal Contents:** Proposals must include the following items, located in **Section VII Proposal Forms**, all of which must be submitted concurrently and executed as required by these Proposal Instructions:

1. Consultant Qualifications and Relevant Experience
2. CM History
3. Qualifications, Organization and Experience of Key Personnel.
4. Required Pricing Data
5. Company Signatory Page
6. Non-Collusion Affidavit

- c. **Questions:** Any questions regarding the information contained in this Request for Proposal must be submitted in writing via email to districtbids@smccd.edu on or before **February 19, 2015**. Consultants may request clarifications or make other inquiries concerning this Request for Proposal or the requirements hereof.
- d. **Modifications to Submitted Proposal:** A Consultant submitting a proposal may modify its submitted proposal in writing, to be received by SMCCCD's Department of General Services at or prior to the time/date deadline for submission of proposals. Modifications to the submitted proposal which are not in writing will not be accepted and will not be deemed modifications to the submitted proposal.
5. **Signature:** A responsible officer or employee for the Consultant must sign the proposal. Refer to the "Information and Signatory Page," section VII.5. An unsigned, but executed proposal may be rejected for non-responsiveness.
6. **Non-Collusion Affidavit:** Each Consultant shall submit with its response a duly completed and executed form of the Non-Collusion Affidavit. The required Non-Collusion Affidavit form is included as section VII.6 of this Proposal. The failure of a Consultant to submit the completed and executed Non-Collusion Affidavit form with their Proposal may result in rejection of the proposal for non-responsiveness.
7. **Evidence of Responsibility:** At the District's request, a Consultant whose proposal is under consideration shall promptly submit to the District satisfactory evidence showing the Consultant's financial resources, and available organization for the performance of the contract. Failure to submit requested materials in a timely manner will result in rejection of the Consultant's Proposal for non-responsiveness.
8. **District Modifications to Request for Proposal:** The District reserves the right to modify this Request for Proposal or any portion hereof by written addendum. The addendum will be issued to all the Consultants who have previously received this RFP from the District. All addendums issued by the District pursuant to the foregoing shall be deemed incorporated into the proposals.

- 9. Evaluation of Proposal and Award:** The District will award the contract to a responsive and responsible Consultant whose Proposal meets the capabilities, experience, and pricing deemed to provide the best value for the District. Evaluations will be based on a number of categories including but not limited to:
- a. Consultant qualifications and relevant experience
 - b. Quality of services and support
 - c. Qualifications, experience and organization of project team personnel
 - d. Required Pricing Data
 - e. Proximity of location of home office to District
 - f. Consultant Interview, if applicable

The District reserves the right to negotiate with and/or request best and final offers from selected Consultant(s), as the District may deem appropriate in its sole and absolute discretion.

The issuance of this Request for Proposal creates no obligation on the part of the District and the District reserves the right to reject any or all Proposals, or to waive any irregularity or informality in a Proposal or in the Proposal process. Award of the contract by the Board will be based upon a comprehensive review and analysis of the Proposal(s) as to which best meets the needs of the District. The District will be the sole judge of the suitability of the Proposal and the Consultant shall abide by its decision.

V. GENERAL TERMS AND CONDITIONS

1. Contract Terms & Conditions

By submitting a proposal, the Consultant agrees to abide by the terms and conditions of the proposal and contract documents. The District reserves the right to cancel the contract resulting from this agreement with thirty (30) days written notification.

This proposal document and all documents submitted by the Consultant will be incorporated into the SMCCCD Short Form Professional Services Agreement. The District is reviewing its Professional Services Agreement forms and will provide a sample agreement as an addendum early in February.

2. Contract Award

It is the District's intent to award a Professional Services Agreement after Approval by the Board of Trustees, expected on March 25, 2015.

3. Conflict of Interest

No officer, member or employee of SMCCCD and no member of its governing bodies shall have any pecuniary interest, direct or indirect, in this contract or the proceeds thereof. No Consultant or member of Consultant's family shall serve on a District board, committee, or hold any such position which either by rule, practice or action nominates, recommends, supervises Consultant's operation or authorizes funding to Consultant.

4. Proposal Preparation Expenses

The District will not be responsible for any expenses in the preparation and/or presentation of the Proposal or for the disclosure of any information or material received in connection with this solicitation, whether by negligence or otherwise.

5. Public Record

Government Code Sections 6250 et. seq., the Public Records Act defines public record as any writing containing information relating to the conduct of the public's business. This applies to proposals submitted pursuant to this Request for Proposal.

The Public Records Act provides that public records shall be disclosed upon written request, and that any citizen has a right to inspect any public record, unless the document is exempted from the disclosure requirements. The District cannot represent or guarantee that any information submitted in response to the Proposal will be confidential. If the District receives a request for any document submitted in response to this Proposal, it will not assert any privileges that may exist on behalf of the person or business submitting the proposal. Rather, the District will notify the party whose proposal is being sought. In the event that a party who has submitted a proposal wishes to prevent disclosure, it is the sole responsibility of that party to assert any applicable privileges or reasons why the document should not be produced, and to obtain a court order prohibiting disclosure.

6. Promotion

In no instance will SMCCCD or the name of any of the Colleges be used by the Consultant in connection with any advertising or promotion without the specific written permission of SMCCCD.

7. Fair Employment Practices/Equal Opportunity Acts

The District is an equal opportunity employer. By submitting this proposal, the Consultant certifies that he/she is in compliance with the Equal Employment Opportunity Requirement of Executive Order 11246, Title VII of the Civil Rights Act of 1973, the California Fair Employment Practices Act and any other Federal or State laws and regulations related to Equal Employment Opportunity. Consultant's personnel policies shall be made available to District upon request.

8. District Provided Resources

Office space, office furniture, office equipment such as: computers, printers, fax machine, copier, scanner and office supplies e.g. paper, toner, etc. will be provided by District during the term of this agreement.

9. Reimbursable Expenses

Reimbursement for transportation will be limited to pre-authorized travel outside of San Francisco, San Mateo, Santa Clara, Contra Costa and Alameda Counties.

VI. SCOPE OF WORK

In keeping with the District's desire to promote accountability, efficiency and cost effectiveness, the District is seeking the services of a Construction Manager (CM) to provide District-wide coordination and oversight of design and construction of capital projects delivered as part of the District's Capital Improvement Program Phase 3 (CIP3). In compliance with all California government codes and regulations applicable to

community college districts, the CM shall ensure proper definition and implementation of the work and maximize value to the district through effective construction execution.

The Construction management firm selected shall be qualified to provide full service construction management services including, but not limited to, the following:

1. Develop and maintain a comprehensive strategic plan for each campus that accounts for construction schedules, logistics, required resources, swing space, academic schedules; an organization chart to establish and maintain organizational structure; and a communications plan to promote accountability and coordinate access of construction firms to any college campus during construction. Plans must be updated quarterly.
2. Work collaboratively with the District, colleges, A/E firms, Consultants, and Contractors. Facilitate interdisciplinary communication and establish consistent data formats and controls.

If required, provide and present information to the Board of Trustees, the District, College Administration, College Constituencies, Community and the Citizens Oversight Committee. This will include a detailed Monthly Report in a format acceptable to the District.

3. CM will be responsible for administering, maintaining and archiving all project documents, utilizing a combination of the District provided web-based Program Management Information System and a virtual filing system on District servers.
4. The District will provide and maintain a computerized, integrated and web-based interactive Program Management Information System similar to Eadoc Software, including all required information technology systems hardware, software, training and maintenance. The CM shall facilitate updates to and maintenance of information residing in this database relative to projects for which the CM is responsible. The CM shall utilize the web-based program management system to communicate project information to District, CM, design professionals, consultants and contractors.
5. Maintain data and produce reports and presentations from a variety of District-supplied data and resources including:
 - Project cost data
 - Project schedule data (Primavera schedules and related reports shall be provided by Others)
6. Maintain project progress records. All records, correspondence, contracts, technical studies, and other related documents will remain the property of the District. CM will produce an annual report on project progress and cost analysis.
7. Participate in the development of, review and comment upon schedules and cost estimates prepared by District scheduling and cost estimating consultants.
8. Participate in procurement of district wide program support services.
9. Provide assistance in ensuring applicable environmental requirements such as those emanating from the Environmental Protection Agency (EPA), Cal/EPA, California

Environmental Quality Act (CEQA), and Regional Water Quality District laws, regulations and rules are incorporated into procurement and contract documents as appropriate and are enforced. This may require oversight of implementation of storm water pollution prevention plans and other environmental impact mitigation requirements.

10. Oversee the Construction Safety Programs of all contractors and establish, implement and maintain a 'Safety Program' to comply with regulatory requirements and District policies. Secure a copy of the contractor's safety plan. Oversee the use of temporary fencing and 'personnel control systems' to keep construction workers apart from students, staff and campus community.
11. The District will provide an Environmental Implementation Plan that will contain outlines of proposed program policies and procedures. CM will work with the District to prepare detailed working plans to implement these policies and procedures.
12. Provide a LEED Accredited Professional to support projects designated for LEED certification.
13. Provide if required, services to assist the District in reaching decisions regarding sustainability issues and appropriate LEED goals for each project to ensure compliance with LEED certification standards.
14. Work with District Facilities personnel and consultants to perform in-depth field reviews of planned improvement areas to evaluate utility systems (plumbing, HVAC, electrical, control, tele/data, etc.) and to continuously update the District's Utility Mapping System, Landmark. Give attention to opportunities for targeting specific pieces of equipment for selective replacement or reconditioning vs. the unilateral tactic of replacement.
15. Work with District Facilities personnel and consultants to complete field reviews of planned improvement areas and prepare a detailed CM services scope for each project.
16. Make recommendations where to seek customary or non-customary levels of geotechnical or similar type investigations with particular attention to achieve proper coordination between individual projects. Special attention should be given to sites suspected of possessing extensive existing underground utilities where there is a low tolerance for service interruptions to on-going operations.
17. Provide advice on the timing and manpower levels required for the workload for each project.
18. Work with District staff to review and refine standard forms of agreements and contracts for professional and contracting firms developed by District's legal counsel.
19. As appropriate, provide functional and technical supervision over the CIP3 design and technical service providers and other consultants.
20. Assist in the development (by others) of and adherence to Program design standards.
21. Review Architect/Engineer design and construction documents for feasibility and constructability and conduct constructability reviews, as assigned.
22. Facilitate and participate in Value Engineering exercises at appropriate intervals of each project phase, as directed.

23. Coordinate with the Division of State Architect to facilitate plan checks and approvals, and coordinate activities of DSA Project Inspector along with filing of appropriate reports.
24. Develop a comprehensive work plan that establishes the status of pre-design, design, construction and post construction progress for each project and report the findings.
25. Develop and monitor implementation of an overall Quality Assurance Plan. Coordinate design document and bid document requirements to ensure development and success of a project specific Quality Assurance Plan for each project.
26. Advise the District about project phasing and contracting strategy to avoid cost overruns, duplication of effort, use of temporary facilities, and claims mitigation.
27. Advise the District in such matters as:
 - Structure and implementation of appropriate delivery methods for individual projects
 - Swing space management/scheduling
 - Bid package structuring
28. Coordinate with the District's General Services Department to monitor and encourage bidder interest during Project procurement phase.
29. Work with District's General Services Department for the following:
 - Facilitate pre-bid conference to review contract requirements
 - Invite Design Professionals involved with the project to attend pre-bid conference
 - Coordinate responses to questions from prospective bidders during the procurement phase
 - Conduct prospective bidder visits to the sites to facilitate their investigation of existing conditions
 - Support the District in preparing bid documents, reviewing bids and proposals and in recommending award of contracts to the Board of Trustees
 - Monitor status of Purchase Order preparation
 - Upon issuance of Notice to Proceed, initiate contractor mobilization
30. Oversee implementation of District's Project Labor Agreement (PLA) per project as appropriate.
31. Provide on-site construction management services as follows:
 - Ensure contractor conformance with contract documents on projects for which the CM is responsible
 - Schedule and conduct regular site meetings and distribute meeting minutes
 - Monitor and evaluate progress of the work relative to schedule
 - Review work performance of all contractors and facilitate Design Professionals and Inspectors of Record to identify and reject work not conforming to the contract requirements
 - Recommend to District appropriate courses of action when contract requirements are not fulfilled
 - Assist District and colleges to resolve any questions that arise during construction
 - Implement claims resolution procedures if required
32. Facilitate review, approval approving and processing of applications by Contractors and A/E's for progress and final payment, including monitoring appropriate lien releases and submittals of required certified payroll reports.

33. Review and document construction progress. All change order requests will be reviewed for compliance with contract documents and pricing accuracy. Cost effectiveness and budget control are a high priority in this process. Prepare all necessary approval documents.
34. Coordinate project close-out. Please refer to Appendix D for sample project close-out checklist. Activities include but are not limited to the following:
- Develop and execute a project specific close-out plan, adhering to the District's closeout procedure. Review and process Inspector of Record and Design Professional's certification regarding project completion, inclusive of punch list items and compile detailed punch-lists with the architect
 - Facilitate final inspections with Facilities Maintenance and Operations staff
 - Obtain final release waivers, and consent of surety
 - Obtain final DSA close-out
 - Coordinate building and systems commissioning by commissioning agent and pertinent contractors when applicable
 - Ensure that contractors conduct and document systems start-up testing
 - Facilitate and document delivery and content of contractually required start-up and training programs for Facilities Maintenance and Operations staff for building systems and equipment
 - Assist with claims resolution as required including support for mediation, arbitration, or litigation
 - Receive, catalog, and archive project close-out documents
 - Verify that as-built drawings accurately describe all changes to original contract documents. Ensure that Architect of Record approves as-built drawings
 - Accept delivery of and archive electronic and printed formats of as-built drawings from all contractors and architects
 - Coordinate delivery and archiving of warranties
 - Coordinate delivery and archiving of O&M manuals
 - Financial:
 - Recommend release of final payment to all contractors, including release of retainage
 - Commissioning:
 - Begin planning for commissioning with Schematic Design. If requested by the District, develop a preliminary Commissioning Plan; review same with District and appropriate Design Professionals and consultants
 - Facilitate development of a start-up & commissioning schedule. Start prior to mechanical completion of the systems. Plan commissioning to minimize functional system testing overlap, reduce project documentation requirements, and provide earliest possible beneficial operation of the facility
 - Work with contractors and District staff to monitor, track and enforce warranties

VII. PROPOSAL SUBMISSION DOCUMENTS

1. Consultant Qualifications and Relevant Experience

Consultant must respond to all of the following statements. Responses should be included in the proposal in a section clearly labeled as **"1. Consultant Qualifications and relevant experience"**

- A. Describe your firm's capabilities and general approach to timely complete CM management basic services as described in the scope of work.

What differentiates your approach to CM management services from others in the industry?

- B. Describe special qualifications related to CM management services for a complex Capital Improvement Program and individual construction projects that your firm would offer.
- C. Along with a variety of construction and design professionals involved in a Capital Improvement Program, a multi-college community college district has a complex culture and a wide variety of stakeholders with various interests. What techniques have you employed to understand these complexities and work collegially within such a framework?

Include examples of your firm's experience in facilitating the decision process in a participatory governance environment and your firm's experience facilitating, coordinating and presenting to various constituents including community outreach

- D. Describe your firm's experience working in higher education and specifically your firm's work on occupied campuses in the California Community College System or other educational campuses in California.

Include examples of the firm's experience in coordinating DSA review and closeout.

- E. Describe your firm's experience in developing program level CM service strategies to mitigate or eliminate Project Budget overruns and describe those strategies. Describe how your firm applied such strategies on prior Capital Improvement Program CM assignments.
- F. Describe what measures your firm utilizes to control and eliminate schedule slippage. Describe the application of such measures.
- G. Describe your firm's special strengths, capabilities or other unique qualifications, and the proposed personnel expected to be provided by your firm to successfully implement CIP3. What measures does your firm have to manage employee turnover?
- H. Provide your firm's experience in providing CM services for LEED Certified projects.
- I. Provide your firm's level of expertise and experience providing CM services in connection with projects utilizing the latest Modeling software, BIM, for constructability review, estimating, value engineering and scheduling, or other project management activities.
- J. Include a summary statement of why your firm is uniquely qualified and should be selected for this particular opportunity.

2. CM Project History

Using a format similar to the one below, provide five (5) specific examples of projects currently in progress or completed within the past (5) years which you feel best represents your firm's ability to perform CM services as described in this RFP. At minimum, the CM assignments must include projects or programs with budgets equal to or greater than \$50 million dollars, occur on occupied California campuses, and be of similar scope to what is planned in CIP3. Title the page as "**2. CM Project History.**"

CM PROJECT HISTORY

- | |
|---|
| a. Name, location and duration (start/end date) of past Capital Improvement Program CM services assignments |
| b. Special challenges encountered and how they were overcome |
| c. Contact name of key owner representative involved with the project including phone, address, fax, and email. |

3. Qualifications, Organization and Experience of Key Personnel

Describe your organization's approach to providing all services as required in the RFP.

Include a Project Organization chart and résumés of key personnel as well as supporting staff personnel who you expect to be available during the CIP3 Program. Résumés should include relevant experience to the SMCCCD CIP3 Program and roles and responsibilities of each individual. Include the following information about each team member. Provide this information in a section in your proposal clearly labeled "**3. Organization and Key Personnel.**"

Name

Title

Office Location

Qualification/Certification/License

Role in the proposed project

Résumé showing relevant history

How long in current position

How long with Relevant Experience

How long Licensed/Certified

Number of Community College Program CM assignments including number of projects managed

Brief Profile

Other relative experience

4. Required Pricing Data

Upon issuance of Notice of Award, the District expects to issue an initial contract to the selected CM Firm for strategic planning support services with a stipulated Not-to-Exceed amount of fifty thousand dollars (\$50,000).

As the program is better defined, the District shall request proposals from the selected CM Firm for individual projects or assignments on a time and materials basis with a stipulated Not-to-Exceed amount per project or assignment.

For purposes of evaluating each submitted proposal and determining the best value to the District, provide a cost proposal, using a format similar to that shown below, for the following pricing components. Provide this information in your proposal in a section clearly labeled “**4. Required Pricing Data**”:

- Hourly rate sheet for all personnel expected to provide services and for which your firm will invoice the District in connection with CIP3
- Unit pricing for any other materials, equipment or services for which your firm will invoice the District in connection with CIP3, including any anticipated travel expenses
- List of items expected to be submitted for reimbursement and proposed percentage mark-up for reimbursable expenses

When developing its cost proposal consultant should consider the following per Section V.8 and V.9:

Office space, office furniture, office equipment such as: computers, printers, fax machine, copier, scanner and office supplies e.g. paper, toner, etc. will be provided by District during the term of this agreement.

Reimbursement for transportation will be limited to pre-authorized travel outside of San Francisco, San Mateo, Santa Clara, Contra Costa and Alameda Counties.

Sample format for required pricing data

HOURLY RATE SHEET FOR CM SERVICES Provide hourly rates for all personnel expected to provide services		
Stated Hourly Rates will remain firm for the duration of the Contract. Fee increases can be negotiated upon agreement by District and CM.		
Position/Job Title	Role on Project team	Hourly Rate

5. Information and Signatory Page

Firm's Name: _____

Business Address: _____

Telephone: _____ Fax: _____

Email: _____ Web Site: _____

Type of Firm: Corporation: _____ Proprietorship: _____
Partnership: _____ Joint Venture: _____
Other (please describe): _____

Business License Number: _____

Number of years in business under firm name: _____

Full names of firm's owners (> 10% ownership), officers and managing employees:

Has the firm changed its name within the past 3 years? YES NO If yes, provide former name(s):
_____Have there been any recent (within the last three years) changes in control/ownership of the firm?
YES NO

If yes, explain.

Have officers or principals of the firm ever had their business license suspended or revoked for any reason?

YES NO

If yes, please explain.

State your firm's gross revenues for each of the last three years:

Current Year: _____

Last Year: _____

Year before last: _____

Has your firm ever reorganized under the protection of bankruptcy laws? YES NO

If "yes", please enter date of reorganization _____

Name and title of person completing responsible for submission of this Proposal and the responses to this questionnaire:

Signature: _____ Date: _____

Name & Title: _____

Phone: _____ Email: _____

6. Non-Collusion Affidavit

STATE OF CALIFORNIA COUNTY OF _____

I, _____, being first duly sworn, deposes and says that I
(Typed or Printed Name)

am the _____ of _____, the party submitting the
(Title) (Vendor’s Name)

foregoing Proposal (“the Consultant”). In connection with the foregoing Proposal, the undersigned declares, states and certifies that:

1. The Proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization or corporation;
2. The Proposal is genuine and not collusive or sham;
3. The Consultant has not directly or indirectly induced or solicited any other Consultant to submit a false or sham RFI, and has not directly or indirectly colluded, conspired, connived, or agreed with any other Consultant or anyone else to submit sham RFI, or to refrain from submitting this Proposal;
4. The Consultant has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the Proposal price, or that of any other Consultant, or to fix any overhead, profit or cost element of the Proposal price or that of any other Consultant, or to secure any advantage against the public body awarding the contract or of anyone interested in the proposed contract;
5. The Consultant has not, directly or indirectly, submitted the Proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any person, corporation, partnership, company, association, organization, Proposal depository, or to any member or agent thereof to effectuate a collusive or sham Proposal;
6. All statements contained in the Proposal and related documents are true.

I declare under penalty of perjury and under the laws of the State of California that the foregoing is true and correct.

Executed this ____ day of _____, 20__ at _____
(City, County and State)

By: _____

Title: _____

San Mateo County Community College District Capital Improvement Project Management Roles & Responsibilities Checklist										
Name of College Name and Number of Building Name of Project										
V.1 Month Day, Year										
✓ Indicates lead party, 'A' denotes advisory and/or assisting role										
FPO-Facilities Planning & Operations, CM-Construction Manager, ITS-Information Technology Services, GS -General Services, FF&E - FF&E Coordination Consultant										
			FPO	CM	Insurance Broker (Keenan)	ITS	GS	FF&E	Date Completed	Initials of person who completed task
A. PROJECT INITIATION										
1	Set-up project in Banner									
2	Assign FPO Project Management team members									
3	Identify funding source(s)									
4	Select project delivery method (e.g. multiple-prime, D-B-B, D-B)									
5	Develop project directory									
6	Define Owner's Project Requirements (OPR's)									
7	Create project Gantt Chart, update master project schedule									
8	Maintain electronic and "hard (paper)" construction files to properly organize and keep all necessary documents following District-standard filing protocols. Files shall be up to date and accessible to SMCCCD personnel at all times.									
9	Create project web page									
10	Create project downloads folder									
B. PROJECT CONTROLS/REPORTING (IMPACT)										
1	IMPACT Team									
a	Assign IMPACT-Team access rights									
b	Facilitate contractor and consultant training									
2	IMPACT									
a	Input project budgets, funding sources, schedules									
b	Maintain project financial records/controls									
c	Prepare required status reports									
C. BUDGET MANAGEMENT										
1	Develop preliminary project budget									
2	Prepare budget summary (JCAF)									
3	Refine project budget									
4	Add project to program Sources & Uses spreadsheet									
5	Obtain BoT approval for contract augmentations									
D. DESIGN										
1	Establish Design Team									
a	Obtain BoT approval for design phase consultant(s)									
b	Architect Contract Execution									
c	• Prepare/negotiate/execute PSA for Architect									
d	• Enter requisition in Banner									
e	• Forward executed Agreement to Purchasing Department									
f	Cost Consultant Contract Execution									
g	• Prepare/negotiate/execute PSA for Cost Consultant									
h	• Enter requisition in Banner									
i	• Forward executed Agreement to Purchasing Department									
j	Commissioning Agent Contract Execution									
k	• Prepare/negotiate/execute PSA for Commissioning Agent									
l	• Enter requisition in Banner									
m	• Forward executed Agreement to Purchasing Department									
n	Construction Manager Contract Execution									
o	• Issue RFP for CM Services									
p	• CM submits proposal to FPO									
q	• FPO review proposal									
r	• FPO negotiates revised proposal with CM, as needed									
s	• CM submits revised proposal to FPO									
t	• FPO executes CM contract exhibit (2 copies)									
u	• FPO logs exhibit in DocKnox\Vendors\Cumulative Board Approval - Consultants.xls									
v	• FPO files scanned executed CM contract exhibit in DocKnox\Vendors\Consultants\SMC folder									
w	• FPO files hard executed CM contract exhibit in SMC hard contract file									
x	• FPO enters requisition in Banner, provides one executed hard copy to GS to send to vendor									
y	• CM submits invoices to FPO for processing									
z	• FPO codes invoice and forwards for approval									
aa	• FPO submits for processing									
bb	Other Consultant(s) Contract Execution									
cc	• Prepare/negotiate/execute PSA for Other Consultant(s)									
dd	• Enter requisition in Banner									
ee	• Forward executed Agreement to Purchasing Department									
ff	Update project budget profiles in Impact									
gg	Receive and process consultant invoices									
hh	Negotiate, prepare and execute consultant change orders.									
ii	Maintain electronic and "hard (paper)" construction files to properly organize and keep all necessary documents following District-standard filing protocols. Files shall be up to date and accessible to SMCCCD personnel at all times.									
2	Programming Phase									

San Mateo County Community College District									
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a	Coordinate Programming Phase meetings								
b	Update project Gantt Chart, Update master project schedule								
c	Review designer's Monthly Progress Report(s)								
d	Review and approve space schematics/flow diagrams								
e	Review and approve existing facility survey information								
f	Review and approve estimate of project cost								
g	Document College/District approval of Program, by obtaining signatures on Design Approval Form								
h	Issue Program Phase Approval and NTP for designer(s) to proceed to SD Phase								
i	Maintain electronic and "hard (paper)" construction files to properly organize and keep all necessary documents following District-standard filing protocols. Files shall be up to date and accessible to SMCCCD personnel at all times.								
3	Schematic Design Phase								
a	Coordinate SD Phase design meetings								
b	Coordinate DSA preliminary project meeting								
c	Update project Gantt Chart, Update master project schedule								
d	Review designer(s) Monthly Progress Report(s)								
e	Program and Design Standards Conformance Review								
f	Coordinate site visits and investigations								
g	Review and approve written recommendations on required additional information and data								
h	Review and approve preliminary estimates of construction costs, times of completion, and alternatives								
i	Review and approve schematic layouts, sketches and conceptual design criteria, with supporting reports and exhibits								
j	Develop Relocation Matrix, confirm all current locations, and complete photo inventory of current locations								
k	Create schematic FF&E layouts & budgets with supporting reports and exhibits								
l	Review and approve schematic FF&E layouts & budgets with supporting reports and exhibits								
m	Review and approve preliminary OPTC								
n	Review and approve revised OPTC								
o	Review and approve work phasing recommendations								
p	Review and approve information and diagrams for required meetings								
q	Review and approve Design Schedule Report								
g	Document College/District approval of Schematic Design, by obtaining signatures on Design Approval Form								
r	Issue SD Phase Approval and NTP for designer(s) to proceed to DD Phase								
s	Maintain electronic and "hard (paper)" construction files to properly organize and keep all necessary documents following District-standard filing protocols. Files shall be up to date and accessible to SMCCCD personnel at all times.								
4	Design Development Phase								
a	Coordinate DD Phase meetings								
b	Update project Gantt Chart, Update master project schedule								
c	Review designer's Monthly Progress Report(s)								
d	Review and approve DD progress drawings								
e	Review and approve outline specifications								
f	Review and approve space array								
g	Update FF&E layouts & budgets based upon user input								
h	Review and approve DD FF&E layouts & budgets with supporting reports and exhibits								
i	Begin Dovetail Decision Criteria Process™ for Standard and Non-Standard FF&E selection with user group								
j	Submit preliminary building interface direction to architect for FF&E								
k	Review and approve engineering calculations								
l	Review and approve written design criteria for mechanical and electrical systems								
m	Review designer's reports on whether further data, information or permits or reports are needed								
n	Coordinate lifecycle and alternates workshop								
o	Review and approve work phasing recommendations								
p	Review and approve revised OPTC								
q	Review and approve comparative cost studies for major building systems (for Lifecycle and Alternates Workshop)								
r	Review and approve information and diagrams for required meetings								
s	Review and approve designer's report on technical criteria, written descriptions and design data as needed for permits and approvals								
t	Review and approval of designer's recommended supplementary conditions to the construction contract and additional bidding requirements								
u	Review and approval of designer's required disclosures regarding the final design								
v	Review and approve designer's written design certification								
w	Program and Design Standards Conformance Review								
x	Finalize FF&E selection for all new standard and non-standard FF&E; assess reusability of existing								

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y	Finalize IT and AV specifications, coordination information								
z	Track vendor quotes for non-standard items, track development of quotes								
aa	Submit vendor building interface requirements for Non-IT FF&E to Arch								
bb	Document College/District approval of Design Development phase documents, by obtaining signatures on Design Approval Form								
cc	Issue DD Phase Approval and NTP for designer(s) to proceed to CD Phase								
dd	Maintain electronic and "hard (paper)" construction files to properly organize and keep all necessary documents following District-standard filing protocols. Files shall be up to date and accessible to SMCCCD personnel at all times.								
5 Construction Documents Phase									
a	Coordinate CD Phase meetings								
b	Update project Gantt Chart, Update master project schedule								
c	Review designer(s) Monthly Progress Report(s)								
d	Receive and review 50% CDs								
e	Program and Design Standards Conformance Review								
f	Execute PSA(s) for constructability review(s)								
g	Constructability Review(s)								
h	• FPO								
i	• CM								
j	• IOR								
k	• Commissioning Agent								
l	Review and approve designer's 50% OPTC								
m	Approve 50% CDs								
n	Prepare initial Move Management package, develop surplus plan								
o	Coordinate DSA 70% CDs review meeting								
p	Submit final FF&E documentation to District								
q	Receive and review 90% CDs								
r	Program and Design Standards Conformance Review								
s	Constructability Review(s)								
t	• FPO								
u	• CM								
v	• IOR								
w	• Commissioning Agent								
x	Review and approve designer's 90% OPTC								
y	Document College/District approval of 90% Construction Documents, by obtaining signatures on Design Approval Form								
z	Approve 90% CDs								
aa	Maintain electronic and "hard (paper)" construction files to properly organize and keep all necessary documents following District-standard filing protocols. Files shall be up to date and accessible to SMCCCD personnel at all times.								
6 Agency Approval Phase									
a	Review final FF&E building interface documentation from architect, confirm requirements align with need								
b	Track DSA status (through designer)								
c	Update DSA approval numbers log								
d	Receive and file DSA approval letter								
e	File DSA-approved drawings + specs								
f	Maintain electronic and "hard (paper)" construction files to properly organize and keep all necessary documents following District-standard filing protocols. Files shall be up to date and accessible to SMCCCD personnel at all times.								
E. BIDDING									
1	Prepare Division 00-01 package								
2	• Legal terms and conditions								
3	• Instructions to Bidders								
4	• Bid form, alternates, allowance								
5	• Table of Contents, Drawing List, Maps								
6	• Commissioning Procedures								
7	• Special Procedures								
8	• Summary of Work								
9	• Agreement								
10	• Logistics, schedule								
11	• Supplemental Conditions								
12	• Report, Surveys & Existing Conditions								
13	Obtain bid # from Purchasing Dept.								
14	Advertise project								
15	• Website								
16	• Legal notice								
17	• Trade publications								
18	• Bid Announcement email(s) to PQ contractors & others								
19	Assemble bid package(s)								

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20	OCIP: Invite Keenan to pre-bid conference									
21	Conduct pre-bid conferences & jobwalks									
22	Post pre-bid conference attendees list on website									
23	Monitor bidding, answer RFI's & issue Addenda									
24	Post bid addenda on website									
25	Receive & evaluate bids									
26	• Summarize bids and post on website									
27	• Price & conformity with bid documents									
28	• OCIP: Verify contractors' ability to enroll in OCIP									
a	• Email to Keenan: bid results spreadsheet, OCIP Qualification Forms and Subcontractor List of 3 Low Bidders									
b	• Review OCIP eligibility of 3 lowest bidders (including Qualification Forms, IIPPs, Serious & Willful Violations history, and EMRs)									
c	• Review Contractors' IIPP's									
29	Submit agenda title and prepare/submit Board of Trustees report									
30	Issue Notice of Intent to Award project & post on website									
F. CONTRACT EXECUTION & OCIP POLICY										
1	Issue Notice of Award									
2	Populate Agreement & issue to contractor(s)									
3	Receive and validate contract documents									
4	• Agreement signed by contractor(s)									
5	• Payment and performance bonds									
6	• Insurance certificates and endorsements									
7	• Guaranty									
8	• Collect and file PLA Letters of Assent at time of contract execution									
9	• Collect and file PLA Letters of Assent as contractors on-board									
10	• OCIP: Contractors' enrollment forms									
11	Execute Agreement									
12	Enter requisition(s) in Banner									
13	Forward executed Agreement to Purchasing Department									
14	OCIP Policy									
15	• Provide site plan to Keenan									
16	• Provide construction schedule to Keenan									
17	• Provide construction cost breakdown to Keenan									
18	• Submit Builders Risk application to Keenan									
19	• Submit Builders Risk application Supplement to Keenan									
20	• Submit OPPI application to Keenan (design-build projects only)									
21	• Obtain Architect's Certificate of Insurance									
22	• Notify Keenan of construction start date (NTP date)									
23	• Notify Keenan of design start date									
24	• Keenan issues signed Premium Proposal/Binder & D-1 Forms									
25	• Facilitate EVC execution of Premium Proposal/Binder & D-1 Forms									
26	• Keenan issues SEWUP Certificate of Insurance (COI)									
27	• Keenan emails notification to FPO cc SMC that OCIP coverage is in place									
28	• OCIP Invoice processing									
29	• File Project Insurance Master Policies CD with Endorsements									
G. CONTRACTOR MOBILIZATION										
1	Issue Notice to Proceed									
2	Enforce Notice to Proceed (NTP) requirements									
3	• Approved site-specific safety program									
4	• Required permits									
5	• Approved fire protection plan									
6	• Pre-construction conference									
7	• Approved schedule of values									
8	• Approved construction schedule									
9	• Web-based project management system training									
10	Secure parking permits and keys for contractor(s)									
11	Prepare & maintain project contact list									
12	Prepare and submit DSA notification forms									
13	Prepare disruption notices and notify affected College departments of closures and shutdowns.									
a	Prepare construction notices; email as attachment to Facilities Operations Manager for email issuance to college community									
b	If needed, also notify outside agencies and/or neighbors (e.g., local fire agencies, local homeowner associations, individual neighbors, etc.)									
H. SUBMITTAL & SHOP DRAWING REVIEW										
1	Prepare and maintain a submittal and shop drawing log									
2	Assess contractor's submittal/shop drawing review schedule on a regular basis.									
3	Receive contractor's submittals and shop drawings. Review for conformity with contract requirements (e.g. quantity, completeness, etc.). Distribute within SMCCCD and to appropriate consultants.									
4	Review submittals and shop drawings.									

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5	Monitor status of submittals and shop drawings. Follow-up on outstanding or late documents.								
6	Receive and compile submittal and shop drawing comments from all sources. Update log to indicate final dispensation of document. Distribute returned submittals and shop drawings to contractor(s).								
I. CONSTRUCTION									
1	Construction Contract Administration								
a	Administer and enforce all construction contracts on behalf of the District.								
b	Verify site conditions relative to FF&E to assure coordination								
2	Coordination								
a	Coordinate all parties involved in the construction phase. This includes but is not limited to: Contractors, direct material or equipment suppliers, inspection and testing companies, State and local authorities, project architects and engineers, other consultants and pertinent District departments.								
3	Recordkeeping								
a	Maintain electronic and "hard (paper)" construction files to properly organize and keep all necessary documents following District-standard filing protocols. Files shall be up to date and accessible to SMCCCD personnel at all times.								
4	Meetings								
a	Conduct regular jobsite meetings with contractors, project architects and engineers and representatives of District to discuss procedures, progress, problems, scheduling and other appropriate matters; prepare agendas for each meeting; take minutes of each meeting, indicating actions items and responsible parties, transcribe, and distribute copies to all participants.								
5	Documenting Work/Site Conditions								
a	Using photographs, videos, geotech reports, etc., document pre-construction conditions of the site and adjacent facilities.								
b	As needed, maintain a daily log of all construction activities and collect daily reports from contractor(s).								
c	Record construction progress using digital photographs. Upload photos to projects files on a weekly basis.								
d	Update photo album on project websites								
e	Set-up project webcam								
6	Requests for Information (RFIs)								
a	Maintain and/or monitor status of contractor-generated RFI log								
b	Receive and review all RFIs. Check for compliance with contract requirements.								
c	Enter into Impact-Team website and distribute to appropriate project team members along with links to necessary reference documents (e.g. specifications, plans, contracts, etc.)								
d	Confirm FF&E Consultant is included in ASI and RFI loop for all relevant construction modifications								
e	Monitor status of RFIs. Follow-up on outstanding or late documents.								
f	Distribute, monitor and coordinate resolution of RFI responses from all sources. Develop and/or monitor status of updating of log to indicate final dispensation of document. Monitor return of RFIs to contractor(s).								
7	Testing & Inspections								
a	Solicit proposals for pre-qualified inspectors								
b	Execute contract exhibit/change orders with selected IOR								
c	Enter Banner requisition for IOR								
d	Solicit proposals for pre-qualified testing agencies								
e	Execute contract exhibit/change orders with selected testing agency								
f	Enter Banner requisition information for testing agency								
g	Coordinate inspections and testing								
g	Coordinate filing of reports in IMPACT								
8	Schedule Updates								
a	Receive, review and approve updated contractor progress schedules.								
b	Maintain master project schedule								
c	Maintain master program schedule								
9	Contractor Invoices/Paperwork/Payments								
a	Receive and review contractor invoices. Check for compliance with contract requirements. Compare against approved schedule of values and progress schedule. Forward to FPO Operations Manager for payment if acceptable.								
b	Digitize contractor invoice(s) and forward to Vice Chancellor of FPO for approval. FPO OM forward to A/P for payment								
c	Receive, collect, audit and make available as requested certified payroll reports								
d	Receive, log and maintain current status reports of all conditional and unconditional releases.								
e	Receive and log all pre-lien and stop-work notices.								

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f	Process stop-payment or lien filings/notices								
10	Change Order Requests								
a	Prepare and maintain change order request log and status report								
b	Receive and review all contractor change order requests (COR) for compliance with contract requirements. Reject incomplete CORs.								
c	Assemble a COR summary package consisting of contractor's supporting documentation, copies of reference specifications, plans, contract documents. Forward to SMCCCD for review. Routing is as follows: CM to FPO PM to VC FPO to EVC.								
d	Manage Owner's Allowance. All change orders over \$5K must be reviewed by FPO prior to approval.								
e	Approve change order requests, using Owner's Allowance, up to \$5K without FPO approval.								
f	Prepare and execute approved change orders. Reject unapproved CORs.								
g	Change order requests exceed Owner's Allowance & are less than 10% of Board-approved contract award			EVC or Chancellor approval required FPO to facilitate					
h	Change order requests exceed Owner's Allowance and are more than 10% of Board-approved contract award			EVC or Chancellor approval required FPO to facilitate					
11	Contractor notices								
a	Prepare and issue defective work notices to contractor(s). Notify SMCCCD.								
b	Notify SMCCCD if a contractor is in default of the terms of their contract or has missed a major milestone.								
c	Prepare and issue warning letters, Notices of Default, warning letter, Termination for Cause letters or Termination for Convenience Letters.								

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12	OCIP (Workers' Compensation)								
	a	Facilitate enrollment of contractors added to project							
	b	Coordinate collection of monthly payroll reports							
	m	OCIP contract completion forms							
13	Site Safety & Security								
	a	Personnel must be onsite or available by cell phone 24/7							
	b	Immediately report and document any injury, incident or unsafe condition to District personnel, Keenan & Associates and contractor(s).							
	c	Assist District and /or Keenan with any and all investigations							
	d	Maintain sufficient onsite presence to verify contractor's safe operations and minimal campus disruption.							
	e	Review results of safety inspections with Keenan's safety officer							
14	Commissioning								
	a	Facilitate/coordinate commissioning agent activities							
	b	Coordinate resolution of non-compliance and construction deficiencies identified in all phases of commissioning.							
	c	Furnish copies of all construction documents, addenda, change orders and approved submittals and shop drawings related to commissioned equipment to the commissioning agent.							
	d	Receive, file and distribute commissioning reports/deliverables							
15	Construction Contract(s) Closeout								
	a	Preparation of punchlist by architect/engineer							
	b	Monitor punchlist status and coordinate completion of outstanding items							
	c	Prepare Substantial Completion Certificate(s)							
	d	Execute Substantial Completion Certificate(s)							
	e	Prepare Notice of Completion Certificate(s)							
	f	Execute Final Completion Certificate(s)							
	g	Obtain final DSA approvals							
	h	Coordinate contractor demobilization							
	i	• Removal of temporary construction facilities							
	j	• Return of all District property including keys and parking permits							
	k	• Final cleaning of project site							
	l	Enforce all closeout requirements for each contractor including: Receive and organize all materials per District filing protocols.							
	n	• Complete Contract Closeout and Retention Release Checklist. (Note: there should be superseding Checklists over the closeout period to document closeout status periodically.)							
	u	Facilitate training of District staff in accordance with contract requirements							
J. GROUP 2 FF&E PERIOD									
1	Non-IT FF&E								
	a	Place new product orders for all Non-IT FF&E per FF&E Schedule							
	b	Coordinate and oversee removal of surplus furniture from premises							
	c	Coordinate and oversee receipt and installation of new non-IT FF&E							
	d	Coordinate and facilitate Furniture Punchlist, completion							
	e	Review and approve FF&E vendor invoices, submit for payment							
2	IT and AV Equipment								
	a	Place new product orders for all IT and AV new equipment per FF&E Schedule							
	b	Coordinate receipt of new IT and AV equipment							
	c	Coordinate installation of new IT and AV equipment							
	d	Equipment Punchlist							
	e	Process equipment invoices							
K. OCCUPANCY PERIOD									
1	Risk Management								
	a	Initiate P&L insurance coverage							
	b	Update Haz Mat Business Plan							
	c	Coordinate Industrial Hygienist pre-occupancy indoor environmental testing							

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d	• Negotiate scope, schedule, fee								
e	• Enter P.O. in Banner								
f	• Schedule testing								
g	• Receive, review test results. Send executive summary + test results link to VCFPO								
h	• Receive, review test results. Send executive summary + test results link to VCFPO								
i	• Remediate issues, retest if needed								
j	• Repeat testing/remediating cycle until test results are acceptable								
k	• Post test results on project web site								
2	M&O Training and Prep for Occupancy								
a	Engineering Program								
b	• Update reference library								
c	• Engineering Training								
d	• Access control activities (pin cores, issue keys, retrieve keys, e-key programming, database updating)								
e	• Stock maintenance supplies, equipment								
f	• Update systems databases								
g	• Add PM tasks to CMMS								
h	• Attic Stock received and accepted								
i	• Connect Utility/Vision meters								
j	Grounds Program								
k	• Update reference library								
l	• Grounds Training								
m	• Stock maintenance supplies, equipment								
n	• Add PM tasks to CMMS								
o	Custodial Program								
p	• Update reference library								
q	• Custodial Training								
r	• Stock maintenance supplies, equipment								
s	Management Program								
t	• Update space inventory								
u	• Space inventory in FUSION database								
v	• Space inventory in CMMS								
w	• Update maintenance assignments								
3	Move Management								
a	Plan Move Management Program								
b	• Executive planning meeting: determine departmental representatives and process definition, fact gathering, document transfer, visit existing and new sites								
c	• Site walk of current location; determine destination of FF&E that will be relocated. Conduct individual meetings as needed to determine space planning								
d	• Determine security, lock and elevator procedures.								
e	• Develop and distribute RFPs for moving company services. Evaluate and recommend to EDFPO.								
f	• Develop surplus plan. Communicate and coordinate with General Services. Seek confirmation of Board approvals for surplus activities.								
g	• Develop Welcome Package: flyer and token memento								
h	• Coordinate waste management activities: schedule debris boxes, metal recycling bins, paper recycling totes, etc.								
i	Implement Move Management Program								
j	• Prepare Move Package								
k	• Prepare Information Sheet containing schedule of activities, packing instructions, technology instructions								
l	• Customize and distribute labels								
m	• Prepare Move Matrix and distribute to FPO, ITS, College Cabinet, affected Deans								
n	• Conduct relocation overview meeting(s) to review relocation plan with affected departments								
o	• Create move maps, temporary signage as needed								
p	• Label common area furniture, misc. items as needed								
q	• Monitor and assist as needed to be move-ready. Supervise and coordinate move.								
r	• Set up physical or virtual "relocation solution suite" to address and resolve move/post move issues								
s	• Distribute Welcome Package								
t	• Coordinate Occupant Orientation(s)								
u	• Coordinate waste management activities: schedule removal of debris boxes, metal recycling bins, paper recycling totes, etc. Provide waste reporting log to FPO for project-specific debris boxes and metal recycling volumes								
4	Update Microsoft Exchange								
a	Ascertain what updates are required								
b	• Meeting Rooms								
c	• People								
d	Update Microsoft Exchange database								

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e	• Meeting Rooms									
f	• People									
5	Update ADA Transition Plan									
a	Ascertain what accessibility deficiencies listed in the transition plan were resolved (mitigated or removed)									
b	• Enter resolution description and date									
c	• Review data with Executive Director of Construction Planning									











Proposed CIP3 Projects “Measure H”

12/01/2014

New Construction	Amount
Cañada College	
New Building Math/Science & Engineering	\$ 40M
College of San Mateo	
Building 5 Workforce and Allied Health Programs	\$ 30M
Building 7 Facilities Maintenance Center & Corp Yard	\$ 12M
Building 8 Kinesiology and Wellness Programs	\$ 40M
Building 19 Engineering/Technology	\$ 45M
Skyline College	
Building 1 Social Science & Creative Arts Programs	\$100M
Building 19 Pacific Heights Demo and North Campus Upgrades	\$ 3M
New Building Environmental Science	\$ 12M
New Building Energy Management Building Programs	\$ 4M
Total New Construction	\$286M
Renovation/ADA/Seismic (140,000 sq. ft. at \$400)	Amount
Cañada College	
Building 3 Humanities	
Building 9 Library/Learning Resource Center	
Building 13 Multiple Disciplinary Instructional	
Building 16 Science (<i>Secondary Effects</i>)	
Building 18 Physical/Life Sciences (<i>Secondary Effects</i>)	
College of San Mateo	
Building 1 Public Safety/Multi-Disciplinary	
Building 3 Humanities/Arts Building	
Building 9 Library/Learning Resource	
Building 17 Student Life/Faculty Offices	
Building 34 Fire Academy	
Skyline College	
Building 2 Workforce & Economic Development	
Building 5 Library & Learning Resource Center	
Building 14 Early Childhood Education	
Total Renovation/ADA/Seismic	\$ 56M
Total Districtwide Projects	\$ 46M
Network Infrastructure, Campus Utilities Upgrades and Repairs, Surveillance Cameras, Renewable and Sustainable Energy Projects and Roadways and Parking Lots.	
TOTAL Proposed CIP3 Projects	\$388M

ID		Task Mode	Task Name	Duration	Start	Finish	Predecessors	Resource Names
1			-	0 days	Wed 7/23/14	Wed 7/23/14		
2			Facility Master Plan Status Update	90 days	Fri 7/25/14	Thu 11/27/14	1FS+2 days	
3			DW CEQA	90 days	Fri 12/5/14	Thu 4/9/15	2FS+5 days	
4			General Obligation Bond	0 days	Tue 11/4/14	Tue 11/4/14		
5			DW Interior Lighting Retrofit (LED)	600 days	Wed 7/1/15	Tue 10/17/17		
6			COP (Tentative)	0 days	Tue 11/4/14	Tue 11/4/14	4	
7			DW Renewable Energy Generation System	380 days	Fri 7/1/16	Thu 12/14/17		
8			Procurement	120 days	Fri 7/1/16	Thu 12/15/16		
9			Design and Permitting	120 days	Fri 12/16/16	Thu 6/1/17	8	
10			Construction	120 days	Fri 6/2/17	Thu 11/16/17	9	
11			Commissioning	20 days	Fri 11/17/17	Thu 12/14/17	10	
12			Cañada CIP3 Schedule	2852 days?	Fri 11/1/13	Fri 10/4/24		
13			CAN B1 Demo & New Kinesiology Bldg and Parking Lot 6 Exp	962 days	Fri 11/1/13	Fri 7/7/17		
23			CAN Math/Science Bldg, N Quad Dev, B22 Mechanical, Lot 10 Exp (DB)	841 days	Mon 2/17/14	Mon 5/8/17		
29			CAN B16/18/19/20/21 Secondary Effects/Swing Space	646 days?	Mon 5/4/15	Mon 10/23/17		
35			CAN B9 Student Support Services Upgrades	340 days	Mon 6/1/15	Fri 9/16/16		
41			CAN B3 Humanities	541 days	Tue 2/23/16	Tue 3/20/18		
48			CAN B13 Multiple Program Instructional Center (Workforce?) (DBB)	759 days	Wed 7/1/20	Mon 5/29/23		
53			CAN Parking Lot and Roadway Resurface / Reseal	354 days	Tue 5/30/23	Fri 10/4/24		
57			CSM CIP3 Schedule	1832 days	Fri 11/1/13	Fri 11/6/20		
58			CSM B3 Theatre Infrastructure Upgrades	664 days	Tue 11/4/14	Fri 5/19/17	4	
63			CSM B17 Student Support Services, EOPS, Multicultural Improvements	609 days	Tue 11/4/14	Fri 3/3/17	4	
70			CSM B12 & B19 Demo and New Engineering & Technology Building and CSM Edison Lot (DB)	841 days	Tue 11/4/14	Tue 1/23/18		
78			CSM B9 Modernization / ITS Relocation (DBB)	564 days	Wed 1/28/15	Mon 3/27/17		
85			CSM Beethoven Lot Drainage and Bus Stop Reconfiguration	410 days	Wed 1/28/15	Tue 8/23/16		
89			CSM B5 Workforce & Allied Health Program Expansion (LLB)	1532 days	Fri 11/1/13	Fri 9/13/19		

ID	 Task Mode	Task Name	Duration	Start	Finish	Predecessors	Resource Names
99		CSM B8 Demo & New Kinesiology Building (DB)	1411 days	Mon 11/4/13	Fri 3/29/19		
106		CSM B34 Facilities Maintenance Center / Corporation Yard	901 days	Mon 1/4/16	Mon 6/17/19		
112		CSM B1 Modernization (DBB)	609 days	Mon 12/19/16	Thu 4/18/19		
119		CSM Parking Lot and Roadway Resurface / Reseal	180 days	Mon 5/13/19	Fri 1/17/20		
123		SKY CIP3 Schedule	2920 days	Mon 11/3/14	Fri 1/9/26		
124		SKY Environmental Science (LLB)	635 days	Mon 11/3/14	Fri 4/7/17		
133		SKY Energy Management Programs (LLB)	635 days	Fri 1/2/15	Thu 6/8/17		
142		SKY Parking Lot and Roadway Lighting Conversion (LED)	330 days	Tue 11/4/14	Mon 2/8/16	4	
146		SKY B14 Loma Chica Systems Upgrade	679 days	Wed 4/1/15	Mon 11/6/17		
151		SKY B1 Demo & New Social Science and Creative Arts Programs / B1 Demolition	890 days	Tue 7/28/15	Mon 12/24/18		
158		SKY B5 Library/Learning Resource Building	679 days	Tue 9/12/17	Fri 4/17/20		
163		SKY B2 Workforce Development and Economic Prosperity Center	679 days	Wed 7/1/20	Mon 2/6/23		
168		SKY Pac Heights Demolition & North Campus	679 days	Tue 2/7/23	Fri 9/12/25	167	
173		SKY Parking Lot and Roadways Resurface / Reseal	480 days	Mon 3/11/24	Fri 1/9/26		

48 CAN B13 Multiple Program Instructional Center (Workforce?) (DBB)

Local \$9.3M

Capital Outlay \$9.7M

163 SKY B2 Workforce Development and Economic Prosperity Center

Local \$7.7M

Capital Outlay \$18.4M



Construction Contract Closeout Checklist / Retention Release Approval

PROJECT INFORMATION			
SMCCCD Project Number and Name			
Contractor			
Project Manager			
Construction Manager			
Campus		Building	
DSA Appl. No.		Other scopes of work under this DSA Appl. No.? (if so, list)	

CONTRACT INFORMATION			
Contract Value			
Contract Execution Date			
Total Retention Held to Date			
Retention Previously Released			
Contractor's Current Retention Release Request			
Recommended Retention Release			
Retention to Remain			
Retention	<input type="radio"/>	District Held	<input type="radio"/> Held in Escrow PM: an escrow release letter is required to release retention
Percentage of Work Complete			
Value of Work that Remains (From Schedule of Values)			
Notice of Completion Filed?	<input type="radio"/>	Yes	Date
	<input type="radio"/>	No	Explanation



Construction Contract Closeout Checklist / Retention Release Approval

Concise List of Items (if any) that Remain to be Completed						
Substantial Completion Date						
Preliminary Notices	Number of Prelim Notices Filed					
	Number of Unconditional Releases Received					
	Approx Value of Outstanding Prelim Notices					
	Date of Most Recent Conditional Notice On Progress					
	Prime Contractor's Conditional Release Received?	<input type="radio"/>	Yes			
		<input type="radio"/>	No			

Construction Contract Closeout Activities					
Section 00 65 36 Guaranty	Contractor warranty received and filed?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	
	Subcontractor warranties received and filed?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	
	Warranty log received and filed?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	
Section 00 65 74 Agreement and Release of Claims	Agreement and Release of Any and All Claims	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	



Construction Contract Closeout Checklist / Retention Release Approval

Section 00 73 17 Insurance	Any outstanding claims?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
Section 01 29 00 Payments and Completion (Measurement & Payment)	Unconditional Lien Release Forms for each filer of a California Preliminary Notice?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	Final Change Order executed?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
Section 01 32 16 Project Schedules and Reports	Final As-Built Construction Schedule received and filed?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	Final schedule report received and filed?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
Section 01 32 23 Web Based Project Management System	All RFIs, RFPs, CPs and other documents closed?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	Contractor Daily Logs filed?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	Contractor-issued Meeting Minutes filed?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	



Construction Contract Closeout Checklist / Retention Release Approval

Section 01 45 23 Testing and Inspection	All contractor-obtained test and inspection reports received and filed?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
Section 01 51 00 Temporary Facilities and Controls	Temporary power/water/data/ phone systems and equipment removed and original/specified conditions restored?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	District-provided telephone service bills paid?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	Temp sanitary facilities removed?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
Section 01 51 00 Temporary Facilities and Controls	Temp fences, barriers and enclosures, erosion control measures, noise control and traffic control measures, temp signage removed and original/specified conditions restored?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
Section 01 60 00 Product Requirements	Equipment Maintenance Logs, as delineated in ¶1.6.H.11, received and filed?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
Section 01 74 00 Cleaning	Waste Reporting Logs received and filed?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	



Construction Contract Closeout Checklist / Retention Release Approval

Section 01 74 00 Cleaning (Cont.)	Final cleaning completed?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
Section 01 77 00 Contract Closeout	BAAQMD permit to operate?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	Attic stock received?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	Punchlist Items 100% completed?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	District-issued Personnel Identification Media, vehicle permits, keys issued to Contractor have been returned?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	Backcharged items paid?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	Training completed, logged?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	Copies of Contractor-obtained permits and applications have been received and filed?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	



Construction Contract Closeout Checklist / Retention Release Approval

Section 01 77 00 Contract Closeout	Record copy of Submittal Log on file?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	Project Directory complete and accurate?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	Fire inspection completed and approved?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	Final verified T&I reports completed and approved?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	Final DSA inspection completed and approved?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	Form DSA-6 Final Verified Report submitted to DSA by Contractor, and copy received and file?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
Section 01 78 39 Project Record Documents	Marked-up Project Record Drawings, as delineated in ¶1.2.A, received and filed?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	As-Built Drawings (on CD, in AutoCAD), as delineated in ¶1.2.B, received and filed?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	As-Built Layout Drawings (on CD, in AutoCAD), as delineated in ¶1.2.C, received and filed?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	



Construction Contract Closeout Checklist / Retention Release Approval

Section 01 78 39 Project Record Documents (Cont.)	As-Built Specifications (in TIF or pdf), as delineated in ¶1.3, received and filed?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	
	Additional Project Record Drawings (on CD, in AutoCAD), as delineated in ¶1.4, received and filed?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	

Section 01 78 39 Project Record Documents	Product Data (one bound hard copy), as delineated in ¶1.5, received and filed?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	
	Product Data (on CD, in pdf format), as delineated in ¶1.5, received and filed?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	
	Misc. Project Record Submittals (on CD, in pdf format), as delineated in ¶1.6, received and filed?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	
	IOM Manuals (one bound hard copy), as delineated in ¶1.8, received and filed?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	
	IOM Manuals (on CD, in pdf format), as delineated in ¶1.8, received and filed?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	
	Computer Programs (on CD), as delineated in ¶1.9, received and filed?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	



Construction Contract Closeout Checklist / Retention Release Approval

Section 01 78 39 Project Record Documents (Cont.)	User manuals and guides for Computer Programs (on CD, in pdf format), as delineated in ¶1.9, received and filed?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
Section 01 91 13 Commissioning	Commissioning activities completed?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	Commissioning Punchlist Items Completed	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	Maintenance Service Contracts in place?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	

DRAFT

Design-Build Contract Closeout Activities (Note: use this supplemental table for design-build contracts only; otherwise, strike through entire section and state "not applicable")				
Section 01 10 01 Summary of Work – Design Services	DSA Approval received?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	
	SMCCCD Design Review Comments resolved?	<input type="radio"/> Yes	Date Received	
		<input type="radio"/> No	Explanation	



Construction Contract Closeout Checklist / Retention Release Approval

Section 01 10 01 Summary of Work – Design Services (Cont.)	General deliverables received and filed: monthly design coordination reports; design milestone phases task lists?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	
	SD deliverables as delineated in ¶1.03 received and filed?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	
	DD deliverables as delineated in ¶1.04 received and filed?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	
	CD deliverables as delineated in ¶1.05 received and filed?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	
	CA deliverables as delineated in ¶1.06 received and filed?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	
	Closeout deliverables as delineated in ¶1.07 received and filed?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	
	Form DSA-6A/E Final Verified Report submitted to DSA by Contractor, and copy received and file?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	



Construction Contract Closeout Checklist / Retention Release Approval

Section 01 78 39 Project Record Documents	LEED documentation received and filed?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	
	Other certification documentation (e.g., Savings By Design) received and filed?	<input type="radio"/>	Yes	Date Received	
		<input type="radio"/>	No	Explanation	

Approvals:	
Swinerton Construction Manager Swinerton Management & Consulting Date: _____ Approved: _____	FPO Project Manager Facilities Planning Department, SMCCCD Date: _____ Approved: _____
José D. Nuñez, Vice Chancellor, FPM&O San Mateo County Community College District Date: _____ Approved: _____	James W. Keller, Deputy Chancellor San Mateo County Community College District Date: _____ Approved: _____