ROCHESTER SCHOOLS MODERNIZATION PROGRAM

(PHASE 2)

PROGRAM MANAGEMENT SERVICES

ADDENDUM #1

Prepared by

Rochester Joint Schools Construction Board

May 8, 2015

Request for Proposals dated April 14, 2015, amended, clarified, and modified as follows:

ITEM 1-1 **NOTE TO ALL PROPOSERS**

IT MUST BE ACKNOWLEDGED IN THE PROPOSAL THAT EACH ADDENDUM WAS RECEIVED.

ITEM 1-2 **Requests for Information ("RFI") - Questions and Answers**

The following list represents the RFI questions that were received by the Selection Committee as of the date/time stipulated in the Request for Proposals.

Q1. Is the fee proposal form to be included as part of the proposal (included in the binder)? Or can the fee form be submitted in a separate sealed envelope?

A1. The fee proposal should be included as a part of the proposal.

Q2. Are 3-ring binders allowed or bound proposals are preferred?

A2. 3-ring binders are allowed for the proposals however bound proposals are preferred.

Q3. Is there a page limitation for the submission? If so, does this limitation include cover letter, title page, table of contents, and all appendices?

A3. There is no page limitation for the submission.

Q4. For the flash drives; is there a maximum file size limitation?

A4. There is no maximum file size limitation.

Q5. We understand from the RFP, Prime Offerors will be evaluated and judged on their ability and experience in managing programs of similar size and complexity. Do qualifications criteria specifically apply to the proposed Prime Firm leading the Program Management team? i.e. is the Prime Firm expected to have previous program management experience in 1 or more of the big five city school districts in NYS; or can the Prime Consultant rely solely on Sub-consultants for such prior experience in large K-12 program in New York State?

A5. It is expected that the Prime Firm leading the Program Management team has the experience and qualifications as required and set forth in the RFP. Sub-consultants are expected to add value, experience, and other core competencies to round out the Program Manager's team.

Q6. Will the Prime Offerors be required to submit Letter of Commitment and City of Rochester residency requirements as part of the qualifications of the Program Director?

A6. There is no City of Rochester residency requirement for the Program Director.

Q7. Will the School District retain a Demographer; or will provide recent enrollment projections to the Program Manager for use?

A7. The Rochester City School District will provide recent enrollment projections to the Program Manager for use.

Q8. Page 23 Paragraph 13 – Please clarify "all inclusive fee for services." Is the fee strictly based on a specific timeline and level of effort?

A8. The fee is intended to be a fixed sum, paid in installments upon achievement of certain milestones agreed to in the final contract. The fee is in addition to the base cost for services.

Q9. Page 25 Paragraph 15 – For the required proposal format, please confirm that nineteen (19) separate sections and tabs required.

A9. All Submissions must contain a Statement of Work that at a minimum clearly identifies sections that address the areas indicated in Section 15. Requirements / Format. Please use a tab in your proposal for each section. The Fee Submittal Form and all other required forms should also be separated by tabs in the proposal.

Q10. Please confirm that all move management, swing space planning, and FFE coordination are included in the Program Manager's base fee; or should be provided as an option.

A10. It is anticipated that a move management consultant will be engaged directly by the RJSCB under a separate RFP/contract. The move manager's scope of work will likely include but not limited to: move coordination, inventory of existing FF&E at each building, RFPs for procuring move services, and FF&E procurement. In the base cost of services, the Program Manager is responsible to coordinate and oversee the work of the move manager.

The individual architects will be responsible for swing space planning. The Program Manager will coordinate and oversee the individual architects. The Program Manager will also be responsible to coordinate with the District regarding swing space planning.

If the proposer wishes to demonstrate how including move management services within the scope of the Program Manager will produce efficiencies, savings, and/or other benefit(s) to the Program, the Selection Committee is open to considering this option.

Q11. Page 4, Paragraph 4 indicates that the "successful candidate will provide the RJSCB with master planning, preconstruction, and administration services". Please define the Scope of Services of the Master Plan Architect as it relates to the role of the Master Plan Architect in Phase 2. If there was a "scope of services" in the agreement under which SWBR was engaged, please provide its full text.

A11. The general scope of services for the Master Plan Architect for Phase 2 includes the following:

- Project Initiation - Review and confirm scope of Phase 2 master plan update services, identify key participants & input groups & confirm target class sizes
- Confirm and update the K-6 and K-8 model programs
- Confirm the secondary (7-12 and 9-12) portfolio of schools with RCSD desired target operating capacities for each
- Analyze current enrollment projections. Assumes RCSD will provide a breakdown current enrollment by grade level (including school housed Pre-K) indicating the zone where the student lives and the school the student attends. Indicate full day and 1/2 day pre-K.
- Analyze impact on enrollment of existing and projected charter schools by grade level.

- Obtain list of 2014-15 enrollment broken down by school and grade level and indicating self-contained special education classrooms with student ratio. Update existing building use plans based on this information.
- Update the "school building statistic chart" for 2014-15
- Update the 2014-15 target operating capacity per building based on 2014-15 room uses plus allowances for unassigned and underutilized rooms
- Update the current Building Aid Units and Maximum Cost Allowances per building based on 2014-15 room uses and the current SED Cost Index
- Update facility assessments using the format developed by RCSD facilities for prior master planning. Update building and site scores and update the building ranking broken down by Elementary and Secondary buildings
- Develop list of candidates for building closure based on facility assessment ranking, proximity to student population and cost to modernize
- Prepare updated preliminary plans ("test-fits") for entire district (two options) based on updated model programs, confirmed portfolio of secondary schools and proposed building closures
- Review preliminary plans ("test-fits") with RCSD staff and revise per comments
- Update proposed operating capacity for entire district by building based on selected option
- Review the infrastructure scope of work descriptions for each school building included in Phase 2 with RCSD staff and update per comments
- Update cost estimates for Phase 2 buildings
- Develop preliminary project phasing plan for review and approval based on swing space identified by RCSD
- Calculate BAU's and MCA's for Phase 2 buildings based on approved preliminary plans. Review & validate BAU & MCA calculations with SED project manager
- Coordinate BAU / MCA / preliminary schedule & phaseing information with Owner's financial advisor to assist with the development of the financial plan and predicted local share amount
- Update Phase 2 master plan document
- Review updated draft of Phase 2 master plan document with SED Facilities Planning
- Review updated draft of Phase 2 master plan document with RCSD, COR & RJSCB leadership teams
- Attend and participate in neighborhood & community outreach meetings (assume 6 meetings)
- Update master plan document based on COR / RCSD / RJSCB / neighborhood and community input
- Assist RJSCB with submission of Final Phase 2 Master Plan to SED

Q12. Page 5, Paragraph 5 indicates that the "The Program Manager will work with the Master Plan Architect and District to finalize the draft Master Plan for Phase 2. Please indicate if a draft Master Plan has commenced or will commence prior to the selection of the Program Manager.

A12. Work on the draft Master Plan has commenced.

Q13. Please indicate what programming has been undertaken or completed for Phase 2 projects.

A13. Programming efforts related to the Master Plan have been started by the Master Plan Architect.

Q14. Please confirm whether programming for Phase 2 projects will be the responsibility of the Master Plan Architect or the Program Manager.

A14. Programming for the projects as it relates to the overall Master Plan will be the responsibility of the Master Plan Architect. Programming as it relates to the individual projects in Phase 2 will be the responsibility of the individual architects engaged for each project. The Program Manager will oversee and coordinate the efforts of the Master Plan Architect and the individual project architects.

Q15. Page 7, Item 8, Please indicate if the Master Plan Architect or the Program Manager will procure and/or provide the listed services.

A15. All of the parties listed in Item 8 on page 7 will work together on these efforts. The Master Plan will define the District's strategic plan with respect to Phase 2 of the School Modernization Program. The RJSCB, the Master Plan Architect, and the Program Manager will provide largely technical support to the District. The Program Manager will specifically administer the Program on behalf of the RJSCB. The District will provide the enrollment projections. The Master Plan Architect will provide the building assessments, initial test fits, and MCA projections for the Master Plan. The school selection recommendations will be made in a collaborative effort between the Master Plan Architect, the Program Manager, and the District (Facilities Department and "Master Plan Task Force")

Q16. Page 7, Item 9, This item indicates that the Program Manager will help solicit community input. Who will solicit input from staff, students, administration and parents? Will staff, students, administration and parents have additional forums or means of providing comment, other than the anticipated public/community sessions, and if so who will coordinate that process?

A16. Focused input at the individual project level from staff, students, administration, and parents will take place during the initial program verification phase of the individual projects, once the projects have been determined and approved via the Master Plan. In support of and in conjunction with the District, the individual architects for each project and the Program Manager will conduct regular planning meetings with the stakeholders of each project (the "Building Advisory Committee(s)") and will also conduct public "town hall" meetings to provide information and collect/respond to comments from the surrounding neighborhoods/communities of the individual projects.

Q17. Page 8, Item 25, This item indicates that the Project Manager Team will present the Schematic Design to the community in public forums. How many presentations will be expected per school?

A17. In support of the District's efforts to present its designs for the individual school projects, it is anticipated that a minimum of 3 public forum meetings will be held per individual school project. One at the kick-off/start of the program verification phase, one at the completion of Schematic Design, and one at final CDs. If there are major changes in the direction or planning for a project it may necessitate additional meetings. There will not be a fee/cost adjustment to the Program Manager if additional meetings/presentations are held.

Q18. Page 9, Item 28, Who will be doing the test fits for the Swing Space - Project Manager or Master Plan Architect?

A18. The test fits for swing space will be performed by the individual architects for each project.

Q19. Page 9, Item 29, This item indicates that the Program Manager will coordinate with District Facilities Department and other Internal Departments. It is expected that the Program Manager will program these requirements?

A19. The Program Manager will coordinate with the District throughout the duration of the Program. The District's requirements will be collected by the architects and/or other consultants for each individual project. The Program Manager and the individual architects will seek the approval/sign-off by the District Facilities department and other internal departments as necessary throughout the Program.

Q20. Page 9, Item 31, This item indicates that the Program Manager will oversee the Architecture/Engineering design for each project. Can you provide additional descriptions or detail on what this will entail? Will you provide base assumptions for this item which will facilitate calculation of an estimated fee?

A20. The Program Manager will coordinate and oversee the design process for each project. This will require collection of information, regular meetings, and coordination of the efforts of all associated participants for the successful completion of each project. The Program Manager is responsible for the budget and schedule of each project and will verify that the District's programmatic and facilities needs are being addressed through the design. The Program Manager is responsible for the successful completion of each project. It is expected that the Program Manager will be intimately involved in each individual project.

Q21. Page 9, Item 35, Similar to Item 31, will you provide assumptions for how many prime contractors will service Phase 2.

A21. It is anticipated that the individual projects will be bid in a multiple prime format. There may be some projects where a single prime contractor bid will benefit the project in terms of cost, schedule, or coordination. The Program Manager and the individual construction managers will make recommendations to the RJSCB regarding the contracting plan for each individual project.

Q22. Page 10, Item 46, please clarify who will be producing the as-built documents.

A22. The as-built documents will be produced by the individual architects for each project. The construction manager(s) will collect as-built documentation from the contractors and turn the information over to the individual architects for use in producing the official as-builts for each project.

Q23. Page 10, Item 47, the requirements set forth in Item 47 should be the responsibly of the Architect. Are you expecting full 3rd party review on all aspects of the documents provided by each Project Architect by the Program Manager? What responsibility are you expecting the Project Manager to undertake in these regulations?

A23. The Program Manager will verify that the architect has met its contractual responsibility with respect to the plans and specifications for each project. While the individual architects for each project are ultimately responsible for the plans and specifications and all code requirements, the Program Manager should have an understanding of these rules/regulations and be able to help identify potential issues.

Q24. Page 10, Communications Are the collateral materials reimbursable? There are a lot of documentation requirements.

A24. We believe that this question refers to Item #2 in Section 6 of the RFP. The Program Manager will provide support to the District as it relates to public forum meetings. It is anticipated that the presentation materials to support the District's public forum meetings will be produced by the Master Plan Architect or the individual architects for each project. These will be handled as a reimbursable expense to their respective contracts.

Q25. Page 12, Detailed Scope of Work, What is the role of Educational Programming for the Master Plan Architect? Will the Program Manager be expected to provide Educational Programming, or the Master Plan Architect, or both (and if both, how will the responsibility be divided)?

A25. We believe this question refers to Item #8 in Section 9, Project Development Phase (Master Plan). The RJSCB, the Master Plan Architect, and the Program Manager will provide largely technical support to the District's in their efforts to create the Master Plan. It is anticipated that the Program Manager will participate in meetings with the District and the Master Plan Architect throughout the development of the Master Plan. The Program Manager will provide guidance, expertise, and recommended solutions to programming related issues and will assist and make recommendations regarding the best solutions for the District's use of their facilities. The Master Plan Architect will collect the information provided by the District and will develop basic facility uses/options for the District to review and approve for inclusion in the Master Plan.

Q26. Generally, there are numerous tasks which will require legal drafting, review or oversight. Please define in detail the scope of the RJSCB's legal counsel services, and what level of legal drafting, review and oversight will be expected from the Program Manager's Counsel. For example, will legal services relating to the drafting, review and oversight of the RFPs to be issued by the RJSCB during Phase 2 be the responsibility of the RJSCB's Counsel, or the Program Manager's Counsel, or will there be sharing/joint responsibility? Please provide the text of the "scope" provisions of the Board's legal services agreement.

A26. The anticipated level of legal support from the Program Manager is de minimis. The Program Manager will be responsible for drafting RFQ's, RFP's, and other general project documents on behalf of the RJSCB. As necessary, those documents will be reviewed by the RJSCB's general counsel prior to issuance. The Program Manager will also make program recommendations to the RJSCB. However, actual legal advice, opinions, and recommendations are the responsibility of the RJSCB's general counsel. The Program Manager will have the responsibility of engaging counsel for the "Opinion of Counsel to the Program Manager" each time the project procures Bonds for financing. For example, in Phase 1 there were three Bond tranches. Each of these required an Opinion of Counsel to the Program Manager.

END OF ADDENDUM #1