

Selecting a Construction Manager

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Factors Influencing the Decision to Use CM

- **Key Factors Influencing this Decision**
 - Establish a realistic dollar threshold
 - Schedule should be a consideration
 - Project logistics should be a factor
 - Complexity of the project, e.g., difficult equipment coordination issues between trades
 - Local contractor base
 - Quality of the project documents
 - Evaluate District resources
 - Political Considerations

Legal Requirements for Selecting a CM

- **Gov. Code Section 4525(e)**
 - “Construction project management” means those services provided by a licensed architect, registered engineer, or a licensed general contractor which meet the requirements of Section 4529.5 for management and supervision of work performed on state construction projects
- **Gov. Code Section 4526**
 - ...local agency heads contracting for private architectural, land surveying, and construction project management services may adopt by ordinance, procedures that assure that these services are engaged on the basis of demonstrated competence and qualifications for the types of services to be performed and at fair and reasonable prices the public agencies

CNUSD’s Interpretation of These Requirements

- **Multiple Prime Construction Management Requirements**
 - No legal advertizing required
 - RFQ vs. RFP—Qualifications only vs. Qualifications and Price
 - Want a licensed General Contractor
 - Must have relevant experience
 - Budget and Schedule expertise
 - Personnel
 - School “construction” experience
 - Firm resources
 - Completed projects
 - Reliability of the Firm
 - Location of the Firm’s offices

Components of the CNUSD RFP

- Selected Preconstruction phase requirements
 - Budgeting, Estimating, Value Engineering
 - Master Scheduling
 - Bidding
 - Addenda Review
 - Construction Contracts

Components of the CNUSD RFP

- Selected Construction Phase requirements
 - Pre-con meetings
 - General Contracting role services
 - Submittal procedures
 - Construction Schedule
 - Payment
 - RFI/C.O. processing and reporting
 - Claims assistance
 - Status reports
 - As-Built documents
 - Closeout activities

Components of the CNUSD RFP

- **Post Construction requirements**
 - Warranty coordination
 - Construction defect services
 - Operational support services

Components of the CNUSD RFP

- **Sample Qualification requirements**
 - Similar relevant projects
 - Experience of assigned personnel
 - List of projects and history of the firm
 - References
 - Insurance requirements (Professional Liability)
 - Licensing requirements
- **Fee Proposal**
 - CM Fee and General Conditions levels
 - Want to know if any standard G.C.'s are scoped to the trade contractors
 - Want to insure that CM Fee includes full scope of services

The Decision Process

- To interview or not to interview
- Price relative to service and experience
- Past performance as a metric
- Familiarity with District procedures and policies
- Specialization
- Reliability of the Firm