



**Request for Proposal
for
Owner's Project Management Services**

**Knox Clinic
Thomaston, Maine**

November 28, 2023

Responses Due
December 15, 2023
1:00 p.m.

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I. Project Overview

A. Project Background

The Knox Clinic (“Owner”) is a non-profit community-driven organization serving the mid-coast community with safety net health services. Clinic is launching a new initiative - the establishment of a Community Health Center (“Center”) in Thomaston, Maine (“Project”).

The Owner aspires to make the Center a multifaceted hub, dedicated to comprehensive healthcare services including primary medical care, dental, vision, mental health, social services, and telehealth. The Center will also foster the education and training of emerging practitioners seeking to gain experience in rural health. In addition, the Project will include accessible space that can be utilized by the community for gatherings, presentations, clinics, or group exercise.

Central to the Owner’s ethos is sustainability and as such, is dedicated to building a facility that is environmentally sound and cultivates a nurturing atmosphere for all its users.

The Center is slated to be built on a 1.5-acre plot in Thomaston at the northeast corner of the Thomaston Green on Route 1.

In addition to securing owner’s project management services, the Owner is currently in the process of selecting architectural and engineering services, with a final firm due to be selected before the end of December.

In order to implement the project the Clinic is planning to engage an individual or organization to manage the construction project on behalf of the Owner. The Owner is expecting the project manager to quickly engage with the Clinic’s project advisory team, the Executive Director, and the A&E contractor. Keeping the project on schedule and within budget is imperative to the mission of the Clinic.

Funding for this Project will include approved federal funds as well as an ongoing capital campaign. It is anticipated the total project costs for the building and site infrastructure and project overhead will be in the range of \$6.5 – \$7.5 million.

B. Project Schedule

The following is a preliminary schedule:

ID	Activity	Date
1	Owner’s Project Management Request for Proposal Issued	11/28/2023
2	Last Day for RFP Questions (1:00PM)	12/9/2023
3	Responses Due (1:00PM)	12/15/2023
4	Interviews (Time TBD)	Week of Dec. 18

5	Notification of Award	12/22/2023
6	Execute Contract with Owners Project Management Firm	12/26/2023
7	Commence work with A/E Firm	01//02/24
8	Entitlements (Permitting) Complete	06/14/2024
9	Bid Documents Complete	07/17/2024
10	Owner Receives Contractor Bids	08/28/2024
11	Owner to Close on Property	09/06/2024
12	Execute Contract with Contractor	09/06/2024
13	Contractor Mobilization	09/09/2024
14	Construction Substantial Completion (Move In)	10/10/2025
15	Owner Final Acceptance (Punchlist Complete)	10/24/2025

C. Proposal Fee Format

Phase	Fee
Pre-Design Phase	
Project Design Phase	
Project Bidding Phase	
Project Construction Phase	
Other (provide detail)	
Total Cost	

D. Questions

Questions or clarifications regarding the RFP shall be submitted in writing on or before 1pm. on December 9, 2023 to Executive Director Meredith Batley at Meredith@knoxclinic.org

II. Owners Project Management Services

A. Scope

The following are an estimation of project management services required to work with the A&E team to obtain permitting, oversee, construction, and the completion of the community health center.

PRE-DESIGN PHASE

1. Assist the Owner with developing a strategy, procedure, and schedule in obtaining the required reviews and approvals of authorities having jurisdiction over the Project, and assist the Owner in connection with the Owner’s responsibility for filing documents required for such approvals.

2. Assist the Owner with establishing project management controls, including scope, budget/cost, schedule, and quality management plan.

PROJECT DESIGN PHASE

1. Project Cost Estimating:

- As the Project team progresses with the preparation of the schematic design, design development, and construction documents, prepare written estimates of the cost of the work in increasing detail and refinement using area, volume, or similar conceptual estimating techniques.

- The cost of the work shall be the total cost to the Owner to construct all elements of the Project designed or specified by the Project team and shall include appropriate contingencies for design, bidding or negotiating, price escalation, market conditions, as well as the Contractor's general conditions costs, overhead, and profit in the estimates of the cost of the work.

- If the Project team suggests alternative materials and systems, at the request of the Owner provide written cost evaluations of those alternative materials and systems, and may also provide its own suggestions for review and consideration by the Owner.

- Advise the Owner in writing if it appears that the cost of the work may exceed the Project Budget and make recommendations for corrective action to be considered by the Owner and Project team, and if appropriate, incorporated by the Project team.

2. Provide written recommendations regarding add and deduct alternates to be considered by the Owner and Project team, and if appropriate, incorporated by the Project team in the Drawings and Specifications.

3. Review the proposed design for the Project, and provide recommendations to the Owner for systems, materials, equipment, and techniques that may be utilized to achieve the most efficient costs and design standards for the Project, if any.

4. Review final plans with Project team, provide recommendations regarding general sufficiency, and budget conformance of the plans and specifications.

5. Work collaboratively with the Project team to identify value engineering alternatives based upon best value criteria developed with the Owner.

6. Assist the Owner in procurement strategies and procedures, including strategy for procurement of construction services of a general contractor; procedures for pre-purchase of material, systems, and equipment; and procedures for evaluating and approving substitutions.

7. Assist the Owner in obtaining building, except for permits required to be obtained directly by the General Contractor.

8. Prepare and issue meetings minutes, as required by Owner.

PROJECT BIDDING PHASE

1. Review and incorporate addendums into the record-bid-documents and advise Owner as to the implications of addendums.

2. Assist Owner and Project team in the procurement process and provide recommendations once the bids have been received through bid analysis.

3. Assist Owner with contract negotiation of alternatives if warranted and/or permitted.

4. Assist Owner with interviewing select, qualified Contractor(s) that supplied construction bids.

5. If bids exceed available construction budget, assist the Owner, Project team and Contractor with review and modification of the contract document plans and specifications in order to bring the construction cost within available funds.

PROJECT CONSTRUCTION PHASE

1. Project Schedule Control:

- Review the Contractor's detailed Project Schedule showing priorities, sequences, durations, and responsible parties, for construction, and Owner activities.
- Monitor and report on the progress of the Project and advise the Owner of observed deviations from the Project Schedule or key milestones that may impact Substantial Completion or final completion.
- Consult with the Owner and the Owner's consultants and Contractor and assist the Owner in developing recovery plans when the schedules or objectives are not being met.

2. Project Budget Control:

- Assist the Owner in the management of Project costs with a budget and cost control system.
- Report the impact on the Project Budget of contracts and Modifications proposed by the Owner and the Owner's Consultants and Contractors.

3. Confirm the General Contractor has prepared a site logistics plan, safety program, and quality control plan.

4. Determine in general that the Work of the General Contractor is being performed in accordance with the requirements of the Contract Documents and notify the Owner and Architect in writing of observed defects and deficiencies in the Work.
5. If requested by the Architect and Owner, evaluate General Contractor requests for information regarding the Contract Documents and provide written recommendations to the Owner and Architect.
6. Upon request by the Owner, review Change Orders and Construction Change Directives prepared by the Architect and provide written comments regarding any questions or concerns regarding the Change Orders or Construction Change Directives.
7. Review information regarding tests and inspections provided by the General Contractor, and provide written comments to the Owner, for consideration by the Owner and Architect, regarding any questions or concerns in connection with the information provided by the Contractor.
8. If it is reasonably believed the Architect should reject Work or require additional inspection or testing of the Work, promptly recommend such actions to the Owner and Architect in writing.
9. Review the General Contractor's Applications for Payment and provide written recommendations, if any, to the Owner and Architect.
10. With the Architect and the Owner's maintenance personnel, observe the General Contractor's final testing and startup of utilities, operational systems and equipment, and observe any commissioning as the Contract Documents may require.
11. Assist the Owner in establishing a procedure for tracking and submission of records, warranties, guarantees, and documents pertaining to systems verification and Project close-out. Deliver to the Owner all keys, manuals, record drawings, and maintenance stocks it receives from the Contractor.
12. Evaluate whether the Work, or a designated portion thereof, is substantially complete and provide its written recommendations to the Owner and Architect. Upon the General Contractor's completion of the Work, inspect the Work and provide written recommendations to the Owner and Architect. Verify receipt of certificates of occupancy, completion of punch list items, and review of record drawings.
13. Review the General Contractor's final Application for Payment and final lien releases and provide written recommendations, if any, to the Owner and Architect.

III. Submission Instructions

A. Logistics

Proposal submissions must be received by December 15, 2023 at 1:00 p.m. by mail or hand delivered to:

Meredith Batley
Knox Clinic
22 White Street
Rockland, ME 04841

in a sealed envelope containing one printed copy of the proposal submittal clearly marked "Owners Project Management for Knox Clinic". Proposals will not be read out loud.

Proposal submissions must also be submitted via electronic mail by December 15, 2023 at 1:00 p.m. to:

Meredith Batley meredith@knoxclinic.org

It is the sole responsibility of the proposer to ensure that the proposal submittal arrives on time and at the designated place.

B. Content

Care should be taken by the proposing firms to present a succinct but informative proposal. The following is a list of minimum information to be included in the written proposals to be submitted:

1. Description of Firm: Name, address, phone number, and email address. History and description of the firm and resumes of key personnel proposed for this Project.
2. Project Approach: A management plan outlining the firm's intended approach to these services.
3. Project Cost Control: A description of proposer's experience with budgets and project cost control during the phases of design and construction.
4. Project Experience: A list and description of all Projects that demonstrate the proposer's capabilities for project management within the past five years.
5. Current Workload: Statement of current workload and ability to absorb the Project.
6. Lawsuits and Claims: List of all lawsuits and claims the proposer has been a party to in the last five years, and the position your firm has taken.
7. Additional Information: Any additional information that the proposer believes would be useful in evaluating its qualifications.

The Owner reserves the right to reject any and all proposals in whole or in part, and to waive minor informalities, when at its sole discretion is deemed to be in the best interests of the Owner and to the extent permitted by law.

IV. Selection Process

A. Review Process

The Owner plans to select a firm through a “Quality Based Selection Process” utilizing a combination of written proposal evaluation and interview process. The Building Committee will evaluate the written proposals and rank the firms in order of qualifications. The Building Committee will take into account all available information, including but not limited to performance of applicants on previous public and private work and the information contained in the firm’s application. The Building Committee may at its discretion invite up to four firms to present their teams and qualifications at an interview before the Building Committee.

B. Evaluation Criteria of Written Proposals

The following criteria, listed in random order, are likely to be considered in evaluating firms to be interviewed based upon written proposal submissions:

1. Compliance with the submission requirements.
2. Quality of proposal, Project approach, and organization.
3. Experience of firm in management of Projects of similar size and complexity to this Project and assigned personnel.
4. Ability to begin immediately after Notice to Proceed and complete work within the given time frame as outlined above.
5. Success of completed Projects, including adherence to schedule and budget.
6. Satisfaction of former or present clients with similar Projects.
7. Experience and reputation of proposed consultants and assigned individuals.
8. Firm’s understanding of the challenges and creative solutions offered through their Project approach.

C. Presentation and Interview

The Building Committee may elect to interview firms that submit proposals and receive high reviews from the written proposal process. Key members of the proposed project management team are expected to participate in the interview/presentation and that will likely be interfacing with the Building Committee for the duration of the Project.

D. Interviews/Presentation Evaluation Considerations

The following criteria, not listed in priority order, are likely to be considered in evaluating and selecting the design team after presentation interviews:

1. Experience with similar building project management.
2. Clarity and method of presentation.
3. Track record of delivering Projects on time and budget from concept to completion.
4. Experience creativity and sensitivity in problem solving.
5. Personal chemistry and energy of team members.

E. Selection and Negotiation

Following interviews, the finalists shall be ranked in order of qualification and the ranking shall be recorded for the record. The Owner then anticipates negotiating an acceptable, lump sum, not-to-exceed fee, with the top-ranked finalist and award a contract. The fee shall include all expenses, including but not limited to, travel, meeting attendance, preparation and production of reports, and telecommunications. If an acceptable fee cannot be negotiated with the top-ranked finalist, the Owner will negotiate with the other finalists in order of their ranking.

The Owner reserves the right to award the contract to the responsive and responsible proposer who submitted the Qualification submittal which best meets the Owner's needs, taking into account the Qualification submittal quality and evaluation criteria. The Owner's decision or judgment on these matters shall be final, conclusive and binding.