

# **Livonia Public Schools**

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## ***Business Services Office***

Date: June 6, 2013

To: Randy Liepa, Ph.D., Superintendent

From: Lisa Abbey, Director of Business Services

Re: Discussion Related to Bond Issue Implementation

We would like to continue the discussion related to the bond issue implementation at the Building and Site Committee meeting on Monday, June 10, 2013.

One of the discussion topics will be the bid results for the Book of Standards Architect. The bids were opened on June 5, 2013 and CRESA is in the process of reviewing the results. They will bring their preliminary recommendation on Monday for the Board's review and discussion. The target would be to bring the recommendation to the regular Board meeting for approval on June 17, 2013.

We would also like to discuss the criteria for selecting Construction Manager(s) and a Technology Consultant for the bond issue. As we did with the Architect/Engineer for the Bond issue, we would like to get input from the Board of Education on the criteria CRESA will use in their evaluation process. A draft copy is attached.

We will provide the Board with any other updates at that time. As always, please let me know if there are any questions.

LA/kp

c: Board of Education

**LPS BOND PROGRAM – CONSTRUCTION MANAGER CRITERIA SELECTION PROCESS**

The following is Plante Moran Cresa's recommendations relating to the construction manager selection criteria and weighted factors for each of the three (3) LPS Bond Program project types. Information from each firm's proposal will be reviewed and scored according to the criteria definitions as listed below each project type for reference. Firms must meet minimal qualifications established. Interviews will be conducted with the three (3) firms with the highest score for each project type. Once interviews are completed, the Quantitative Score (with a weighted factor of 85%) will be combined with the Interview Score (with a weighed factor of 15%). The firm with the highest score will be recommended for award for that particular project type.

**LPS HIGH SCHOOL – CONSTRUCTION MANAGER CRITERIA**

| <b>LPS HIGH SCHOOL<br/>CONSTRUCTION MANAGER CRITERIA</b> | <b>0 = No Info<br/>1 = Least<br/>5 = Best</b> | <b>WEIGHT<br/>FACTOR</b> | <b>5 total points<br/>available<br/>WEIGHTED<br/>SCORE</b> |
|--|---|--------------------------|--|
| K-12 Auditorium and Fine Arts Experience                 | 0   | 20.00                    | 0.00   |
| Proposed Concept Approach                                | 0   | 5.00                     | 0.00   |
| Firm Resource / Experience                               | 0   | 10.00                    | 0.00   |
| Internal Staff Resource/Experience                       | 0   | 20.00                    | 0.00   |
| EMR Rating (State)                                       | 0   | 10.00                    | 0.00   |
| Bonding Capacity (Aggregate and Single Project)          | 0   | 10.00                    | 0.00   |
| Financial Stability (Z Score)                            | 0   | 5.00                     | 0.00   |
| Proposed Fees and Costs                                  | 0   | 20.00                    | 0.00   |
| <b>TOTAL</b>   |   | <b>100.00</b>            | <b>0.00</b>  |
| <b>Quantitative Score</b>                                | <b>0</b>                                      | <b>85.00</b>             | <b>0.00</b>  |
| <b>Interview Score</b>                                   | <b>0</b>                                      | <b>15.00</b>             | <b>0.00</b>  |
| <b>Total Score</b>                                       |   | <b>100.00</b>            |  |

Plante Moran Cresa will review each CM firm proposal in relation to the scoring listed below. The scoring is to provide guidelines during the proposal review process and PMC will use its professional judgment and industry expertise for applying the score for each firm.

**Notes / Clarifications for the LPS High School projects based on the RFP responses received:**

Relevant K-12 Auditorium and Fine Arts Experience rank is based on the minimum of three (3) completed firm projects within the last 10 years with a construction value as follows: >\$5,000,000 = 5 pts.; \$4,000,000 = 4pts; \$3,000,000 = 3 pts.; \$2,000,000 = 2 pts.; \$1,000,000 = 1 pt.

Proposed Conceptual Phasing Plan and Description rank is based on the best approach to provide the least impact for operations and enhance the learning environment and promote safety : 5 points - best approach; 3 points = better approach; 1 point = good approach

Proposed Firm Resources/Experience is based the firm having the capacity to meet the project schedule in comparison with the percentage of work in process in relation to available staff : >60% availability = 5 pts.; >50% availability = 4pts; >40% capacity = 3 pts.; >30% capacity = 2 pt; >20% capacity = 1 pt.

Internal Staff Resource Experience is based on the proposed key staff having collectively completed the following number of projects with the firm: 6 or more projects = 5 pts.; 5 or more projects = 4pts; 4 or more projects = 3 pts.; 3 or more projects = 2 pt; 2 or more projects = 1 pt.

Experience Modification Rating (EMR) is based on the following: <0.6 = 5 pts.; <0.7 = 4 pts.; <0.8 = 3 pts.; <0.9 = 2 pts.; <1.0 = 1 pt.; >1.0 = 0 pt.

Bonding Capacity (Aggregate and Single Project) is based on the following: Aggregate >\$300M = 3 points; >200M = 2 points; >\$100M = 1 point; Single Project >\$150M = 3 points; >\$100M 2 points; >\$50M = 1 point; (5 points max total)

Financial Stability (Z Score): Safety Zone = 5; Grey Zone = 3, Distress Zone = 1

Total Proposed Fees and Costs: will be ranked with the lowest Total receiving 5 points and setting the curve

Interviews are conducted by the Selection Committee (comprised of PMC and LPS representatives) with relation to the proposal review, team presentation, and individual presentation. Interviews are ranked based on the following: 5 points - best interview; 3 points = better interview; 1 point = good interview.

**LPS UPPER / MIDDLE SCHOOLS AND ELEMENTARY SCHOOLS – CONSTRUCTION MANAGER CRITERIA**

|  | 0 = No Info<br>1 = Least<br>5 = Best |                          | 5 total points<br>available |
|--|--------------------------------------|--------------------------|-----------------------------|
| <b>LPS UPPER/MIDDLE SCHOOL<br/>CONSTRUCTION MANAGER CRITERIA</b> | <b>RANK<br/>(POINTS)</b>             | <b>WEIGHT<br/>FACTOR</b> | <b>WEIGHTED<br/>SCORE</b>   |
| K-12 Renovation Project Experience                               | 0                                    | 20.00                    | 0.00                        |
| Proposed Concept Approach  | 0                                    | 5.00                     | 0.00                        |
| Firm Resource / Experience                                       | 0                                    | 10.00                    | 0.00                        |
| Internal Staff Resource/Experience                               | 0                                    | 20.00                    | 0.00                        |
| EMR Rating (State)   | 0                                    | 10.00                    | 0.00                        |
| Bonding Capacity (Aggregate and Single Project)                  | 0                                    | 10.00                    | 0.00                        |
| Financial Stability (Z Score)                                    | 0                                    | 5.00                     | 0.00                        |
| Proposed Fees and Costs  | 0                                    | 20.00                    | 0.00                        |
| <b>TOTAL</b>   |                                      | <b>100.00</b>            | <b>0.00</b>                 |
| <b>Quantitative Score</b>  | <b>0</b>                             | <b>85.00</b>             | <b>0.00</b>                 |
| <b>Interview Score</b>   | <b>0</b>                             | <b>15.00</b>             | <b>0.00</b>                 |
| <b>Total Score</b>   |                                      | <b>100.00</b>            |                             |

|  | 0 = No Info<br>1 = Least<br>5 = Best |                          | 5 total points<br>available |
|--|--------------------------------------|--------------------------|-----------------------------|
| <b>LPS ELEMENTARY SCHOOL<br/>CONSTRUCTION MANAGER CRITERIA</b> | <b>RANK<br/>(POINTS)</b>             | <b>WEIGHT<br/>FACTOR</b> | <b>WEIGHTED<br/>SCORE</b>   |
| K-12 Renovation Project Experience                             | 0                                    | 20.00                    | 0.00                        |
| Proposed Concept Approach                                      | 0                                    | 5.00                     | 0.00                        |
| Firm Resource / Experience                                     | 0                                    | 10.00                    | 0.00                        |
| Internal Staff Resource/Experience                             | 0                                    | 20.00                    | 0.00                        |
| EMR Rating (State)   | 0                                    | 10.00                    | 0.00                        |
| Bonding Capacity (Aggregate and Single Project)                | 0                                    | 10.00                    | 0.00                        |
| Financial Stability (Z Score)                                  | 0                                    | 5.00                     | 0.00                        |
| Proposed Fees and Costs  | 0                                    | 20.00                    | 0.00                        |
| <b>TOTAL</b>   |                                      | <b>100.00</b>            | <b>0.00</b>                 |
| <b>Quantitative Score</b>                                      | <b>0</b>                             | <b>85.00</b>             | <b>0.00</b>                 |
| <b>Interview Score</b>   | <b>0</b>                             | <b>15.00</b>             | <b>0.00</b>                 |
| <b>Total Score</b>   |                                      | <b>100.00</b>            |                             |

**Notes:**

Plante Moran Cresa will review each CM firm proposal in relation to the scoring listed below. The scoring is to provide guidelines during the proposal review process and PMC will use its professional judgment and industry expertise for applying the score for each firm.

**Notes / Clarifications for the LPS High School projects based on the RFP responses received:**

Relevant K-12 Renovation Experience rank is based on the minimum of three (3) completed firm projects within the last 10 years with a construction value as follows; >\$5,000,000 = 5 pts.; \$4,000,000 = 4pts; \$3,000,000 = 3 pts.; \$2,000,000 = 2 pts.; \$1,000,000 = 1 pt.

Proposed Conceptual Phasing Plan and Description rank is based on the best approach to provide the least impact for operations and enhance the learning environment and promote safety : 5 points - best approach; 3 points = better approach; 1 point = good approach

Proposed Firm Resources/Experience is based the firm having the capacity to meet the project schedule in comparison with the percentage of work in process in relation to available staff : >60% availability = 5 pts.; >50% availability = 4pts; >40% capacity = 3 pts.; >30% capacity = 2 pt; >20% capacity = 1 pt.

Internal Staff Resource Experience is based on the proposed key staff having collectively completed the following number of projects with the firm: 6 or more projects = 5 pts.; 5 or more projects = 4pts; 4 or more projects = 3 pts.; 3 or more projects = 2 pt; 2 or more projects = 1 pt.

Experience Modification Rating (EMR) is based on the following: <0.6 = 5 pts.; <0.7 = 4 pts.; <0.8 = 3 pts.; <0.9 = 2 pts.; <1.0 = 1 pt.; >1.0 = 0 pt.

Bonding Capacity (Aggregate and Single Project) is based on the following: Aggregate >\$300M = 3 points; >200M = 2 points; >\$100M = 1 point; Single Project >\$150M = 3 points; >\$100M 2 points; >\$50M = 1 point (5 points max total)

Financial Stability (Z Score): Safety Zone = 5; Grey Zone = 3, Distress Zone = 1

Total Proposed Fees and Costs: will be ranked with the lowest Total receiving 5 points and setting the curve

Interviews are conducted by the Selection Committee (comprised of PMC and LPS representatives) with relation to the proposal review, team presentation, and individual presentation. Interviews are ranked based on the following: 5 points - best interview; 3 points = better interview; 1 point = good interview.

# LPS RELEVANT TECHNOLOGY DESIGNER SELECTION CRITERIA

The following are Plante Moran's recommendations relating to the technology selection criteria and weighted factors. Information from each firm's proposal will be reviewed and scored according to the criteria definitions as listed below. Firms must meet minimal qualifications established. Interviews will be conducted with the three (3) firms with the highest score for each project type. Once interviews are completed, the Quantitative Score (with a weighted factor of 85%) will be combined with the Interview Score (with a weighed factor of 15%). The firm with the highest score will be recommended for award for that particular project type.

| LPS DISTRICT-WIDE<br>TECHNOLOGY DESIGNER CRITERIA | 0 = No Info<br>1 = Least<br>5 = Best |                  | 5 total points<br>available |
|---|--------------------------------------|------------------|-----------------------------|
|   | RANK<br>(POINTS)                     | WEIGHT<br>FACTOR | WEIGHTED<br>SCORE           |
| Proposed methodology / project approach           |                                      | 20.00            | 0.00                        |
| Relevant education /MI bond experience            |                                      | 15.00            | 0.00                        |
| Staff size  |                                      | 15.00            | 0.00                        |
| Capacity to commit to this project                |                                      | 10.00            | 0.00                        |
| Proposed fee                                      |                                      | 15.00            | 0.00                        |
| Insurance capabilities                            |                                      | 5.00             | 0.00                        |
| Staff expertise                                   |                                      | 20.00            | 0.00                        |
| <b>TOTAL</b>                                      |                                      | <b>100.00</b>    | <b>0.00</b>                 |
| <b>Quantitative Score</b>                         | <b>0</b>                             | <b>85.00</b>     | <b>0.00</b>                 |
| <b>Interview Score</b>                            | <b>0</b>                             | <b>15.00</b>     | <b>0.00</b>                 |
| <b>Total Score</b>                                |                                      | <b>100.00</b>    |                             |

Plante Moran will review each proposal in relation to the scoring listed below. The scoring is to provide guidelines during the proposal review process and Plante Moran will use its professional judgement and industry expertise for applying the score for each firm.

**Guidelines:**

**Proposed methodology and project approach** is based on the most logical and least disruptive approach to provide curriculum integration, integration with existing technology, logical phasing with minimal re-work, coordination with construction and professional development activities, and anticipated highest impact on teaching and learning.

Relative (not forced) ranking: 5 for the best approach, 1 for the worst

**Relevant education / Michigan bond experience** is based on the following number of completed technology projects completed within the past 5 years valued over \$5,000,000 : >7 projects = 5 pts (must include 1 project over \$7 million).; 5 - 6 projects = 4pts; 3 - 4 projects = 3 pts.; 2 projects = 2 pts, 1 = 1 pt.

**Staff size** is based on the number of technology design staff within the firm and the availability of the project manager and technical design specliasts to commit sufficient time to this project: >= 5 technical design staff = 5 points; 4 = 4 points; 3 = 3 points; 2 = 2 points, 1 = 1 points.

**Capacity to commit** to this project: Subjective relative ranking comparing number of staff & number, size and duration of existing projects (5 for the best capacity to commit; 1 for the worst)

**Proposed Fee** will be ranked with lowest fee range receiving 5 points.

**Insurance capabilities** is based on the ability of the firm to obtain the following aggregate: >\$5,000,000 = 5 pts.; = or >\$4,000,000 categories = 4pts; = or>\$3,000,000 = 3 pts.; = or >\$2,000,000 categories projects = 2 pt; = or >\$1,000,000 categories = 1 pt. Vendors who cannot provide a performance bond in the amount of their fees shall lose 2 points >\$3,000,000 = 3 pts.; = or >\$2,000,000 categories projects = 2 pt; = or >\$1,000,000 categories = 1 pt. Vendors who cannot provide a performance bond in the amount of their fees shall lose 2 points

**Staff expertise** is based on the technical skills and experience the proposed team has and how many education projects have been completed within the past 5 years. Vendors shall be asked to complete the attached table. We will force rank the vendors on 2 aspects - most projects completed within the past 5 years across all categories and projects completed for the greatest number of categories. **See Attachment A**

**Attachment A  
Technology Designer - Staff Expertise**

| <b>Technologies</b>   | <b># of completed projects for different education clients (e.g., count 1 per district / university) by proposed team within the past 5 years</b> |
|---|---|
| End user technologies for teaching and learning             |   |
| Enterprise Wireless   |   |
| Classroom presentation                                      |   |
| Mobile device and mobile device management                  |   |
| Workstations and exclusivity agreements                     |   |
| Video surveillance  |   |
| PA and sound systems  |   |
| Door access controls  |   |
| Network infrastructure                                      |   |
| Servers and virtualization                                  |   |
| Storage / backup technologies                               |   |
| VoIP/unified communications                                 |   |
| Structured cabling / outdoor fiber plant                    |   |
| Firewall / intrusion protection / security management tools |   |
| Data center design  |   |
| Large group presentation                                    |   |
| TOTAL   |   |