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RFP-5098

SCOPE OF SERVICES Dated August 29, 2016

The APSB is seeking professional services to provide assistance and support for grants management and administration and associated project management activities as needed for federal and state programs, including primarily, but not limited to, the Federal Emergency Management Agency Public Assistance Program, Federal Emergency Management Agency Hazard Mitigation Program, HUD Community Development Block Grant Program, and U.S. Department of Transportation programs. Respondents with extensive, specialized, and successful expertise in the FEMA Public Assistance Program will receive higher evaluations in the selection.

The scope of services described herein required the Contractor to develop and implement a recovery plan to restore facilities to their pre-disaster condition. A primary objective of this Request for Proposals is to insure that projects within the recovery program are accomplished on time and within budget. Another objective of this RFP is to maximize eligibility and reimbursement for all aspects of the recovery program.

- Overall Program Management Services: The Contractor shall be responsible for supporting the development and implementation of the overall program management plan for the DISTRICT Recovery Plan.
- Management of Design Phase: The Contractor shall be responsible for assisting the DISTRICT in the procurement of, and providing design management of, professional design services required to implement construction of the projects in the DISTRICT Recovery Plan.
- Management of Construction Phase: The Contractor shall be responsible for management of the procurement of construction services and providing project construction management of the construction phase of all DISTRICT Recovery Plan projects.
- Field inspection services: The Contractor shall be responsible for providing field inspection services as necessary to ensure compliance to schedule, budget, and quality contractual requirements.
- Project Controls: The Contractor shall be responsible for coordinating with the appropriate staff person to manage invoices, contracts, change orders, and amendments to develop systems that result in the delivery of projects on time and on budget.
- Grants Administration, Compliance and Close-Out: The Contractor shall be responsible for working with the appropriate Federal, State, Local and Private agencies for obtaining, maximizing and ensuring compliance of FEMA, CDBG, Local and Private funding grants needed to implement to DISTRICT Master Plan. The Contractor is also responsible for

submitting to the granting agency the documents required to close-out all disaster related grants. The consultant shall also be responsible for responding to audit inquiries from a variety of agencies not limited to FEMA OIG, Louisiana Legislative Auditors and DISTRICT Auditors.

- Project Close Out: The Contractor shall be responsible for preparing documentation for close-out. Close-out includes providing data to set-up of preventive maintenance and asset preservation programs for each project executed. It also includes management of one-year warranty period after construction is completed for each project executed. The Contractor shall be responsible for financial reports and other documentation as required per the terms of the financial grants received to execute the projects.

The Contractor shall serve as a representative of the Owner (DISTRICT). The Contractor (or any entity of the Program Management team) will not be allowed to perform architectural or engineering design, or construction services (outside the scope of services outlined in this RFP).

PART I: Grants Management and Administration

The consultant shall work closely and collaborate with various funding agencies and internal DISTRICT departments to ensure the proper use and application of federal and state funds. Consultant shall focus on maximizing eligible, allocable federal dollars. Consultant shall conduct efficient processes that reduce the timeline for eligibility determinations that support project cash flow sources and uses. Consultant will provide technical knowledge and experience, proven business processes, and policy strategies. In order to develop and implement the framework of grant activities, the consultant shall perform services and work necessary to complete the following objectives and tasks:

- Develop a document management plan that specifically outlines the structure, containment, and management of all project documentation consistently for all DISTRICT departments. Effectively maintain efficient and complete records concerning any and all applicable grant programs.
- Prepare and coordinate the development of Project Worksheets (PW's) and versions as required with the DISTRICT, Federal agencies and State agencies. This includes project development, formulation, and processing as required for small and large projects.
- Prepare, submit and track Hazard Mitigation Grant program applications as required with the DISTRICT, Federal agencies and State agencies. This includes project or program development, formulation, processing, and monitoring as required.
- Work with the DISTRICT departments and divisions to obtain all costs and necessary backup documentation to develop, revise and submit PW's and grant applications to the Federal agencies and State agencies to be approved, obligated and reimbursed.
- Review eligibility issues for the DISTRICT and develop justifications for presentation to the Federal agencies, State agencies, and other agencies involved in providing disaster recovery funds.

- Ensure that all eligible damages have been identified, quantified, and presented to the DISTRICT, Federal agencies, and State agencies. All eligible damages shall be incorporated into PW' s and grant applications with supporting documentation and proper cost estimates, using the FEMA Cost Estimating Factor (CEF) when necessary.
- Provide, or as needed retain the services of, professional experts to prepare damage assessments and technical reviews and oversight in the furtherance of program objectives.
- Review contracts, bid documentation, change orders, and other records to support the proper preparation and presentation of PW' s, grant applications and eligible activities.
- Compile and summarize/justify costs for presentation to Federal agencies and State agencies for reimbursement of eligible costs, ensuring compliance with applicable regulations.
- Attend meetings with the DISTRICT, Federal agencies, and State agencies to negotiate and represent PW s and the obligation of eligible amounts.
- Provide grant management advice to maximize reimbursements of disaster recovery expenses.
- Provide advice to DISTRICT personnel and consultants; attend and participate in meetings as required.
- Prepare draft correspondence to local, Federal and State officials as necessary.
- Provide the DISTRICT with any changes in policies, procedures, processes, or deadlines throughout the financial disaster recovery process.
- Prepare and conduct the close-out process, ensuring maximum recovery and retention of all eligible funding, satisfactory disposition of appeals and availability of supporting documents for future audits.
- Prepare for and respond to inspections and audits for on-going and completed projects.
- Prepare formal audit responses and justifications; attend associated meetings and hearings as needed.
- Keep track and monitor consultant's own time and activities by project, or as allowable under the provisions of Federal guidance for direct administrative, indirect, and project management costs (reference Federal regulations and policy guidance for these topics).
- Provide written performance and status reports to DISTRICT on the status of the FEMA Public Assistance program and other grant programs as requested. The performance and status report should include, but is not limited to, the following:
 - o Hours billed and amount invoiced by personnel
 - o PW and grant application development and revisions

- o PW and grant application submissions and approvals
- o Obligated amounts versus eligible estimates
- o Issues with PW and grant application submissions and resolutions
- o Issues requiring assistance
- o Amounts awarded to DISTRICT per PW and grant application
- o Requests for Reimbursement submitted
- o Estimated and actual costs
- o Reimbursements received by DISTRICT
- o Insurance deductions
- o PW and grant application closeouts

PART II: PROGRAM MANAGEMENT

1. Overview

The overall objective is to assist the DISTRICT in managing the implementation of design and construction phases to achieve the objectives of the DISTRICT Recovery Plan. The Responsibilities and Deliverables for this effort include, but are not limited to the following:

A. Overall Program Management

- ***Responsibilities***
 1. Under the direction of the DISTRICT Point of Contact, direct and coordinate the activities of the Project Management team to meet the objectives of the overall program management plan.
 2. Manage, report, and monitor projects to ensure delivery within the established schedule and cost parameters and in compliance with quality assurance requirements; provide timely project communications; develop and implement appropriate recovery strategies when management objectives are at risk.
 3. Determine the current status of all ongoing projects that exist prior to the start of this new contract and provide a plan for managing this transition.
 4. Assist the DISTRICT as required in project/ program financial or programmatic audits.
 5. Assist the DISTRICT in obtaining FEMA reimbursement as well as any other federal/state/local capital funding source, including State and Federal Tax Credits. Attend meetings with related State/Federal and other agencies as necessary and provide project information to them as required. Assist the DISTRICT in liquidating FEMA/CDBG grants to cover program implementation cost.
 6. Provide audit and funding compliance reviews on all projects as required based on the funding source.
 7. Develop, implement and staff a contractor awareness program that encourages and facilitates DBE participation in the DISTRICT Recovery Program.
 8. The Contractor shall work with DISTRICT and its representatives to provide claim and litigation support as denoted in this scope of work for any threatened and actual claims and/or litigation related to the program. The Contractor shall take its direction from DISTRICT and/or its representatives related to actions necessary to respond to any potential claim, litigation or information/document

requested received by Contractor. For matters which the Contractor is not included as a party to any such action, the Contractor shall be entitled to reimbursement from DISTRICT for reasonable costs and expenses incurred by Contractor for responding to and/or assisting DISTRICT with any potential claim, litigation or information/document requested received by Contractor. The parties shall work together in good faith to reach an agreement on the amount of such compensation on a case-by-case basis in accordance with the normal payment procedures outlined in the Contract.

B. Management of Design Phase

The Contractor shall be responsible for assisting the DISTRICT in the procuring and directly manage professional design firms, emphasizing within budget and on time performance. Additionally, the Contractor shall ensure compliance with design guidelines and contract terms as required to execute the delivery of the projects in the DISTRICT Recovery program. The services required include, but are not limited to the following:

- ***Responsibilities***

1. Responsible for the preparation of a professional design services procurement plan and schedule to meet the requirements of the DISTRICT Recovery Program, developing RFP's for architecture and/or engineering services and participating in the negotiations of design contracts as requested by the DISTRICT.
2. Responsible for ensuring DISTRICT is properly incorporating the Board adopted Educational Specifications and Performance Standards into the DISTRICT Recovery Program through its management of the design professionals.
3. Assist the DISTRICT and coordinate with design professionals in properly incorporating design standards and master specifications in each design project.
4. Recommend and implement project delivery strategies and schedules in order to increase construction market competition and realize efficiencies.
5. Develop and maintain a document management system for construction documents and record drawings.
6. Assist in the evaluation and selection of professional design consultants.
7. Manage professional design consultants' contracts and implement design to budget requirements in all RFP's and contracts for design services. Monitor and report on compliance with design to budget requirements.
8. Manage the submittal of all required documents for approval by State, DISTRICT and other local agencies having jurisdiction over the construction of PreK through 12 schools.
9. Validate the Architect/Engineer (A/E) cost estimate and provide value engineering and constructability reviews throughout the design of projects to ensure compliance with project budget and schedule.
10. Provide document quality assurance/quality control reviews.
11. Evaluate and review design errors and omissions, rendering professional opinions to the DISTRICT and assisting the DISTRICT in recovery efforts if necessary.

C. Management of Construction Phase

The Contractor shall be responsible for coordination of the construction process of all DISTRICT Recovery projects. Services required for the construction program include, but are not limited to the following:

- ***Responsibilities***

1. Support and assist in the preparation of the construction program procurement plan and schedule for all recovery projects.
2. Integrate local and DBE business participation outreach into procurement plans.
3. Administer the competitive bidding process for the procurement of construction, including conducting pre-bid conferences.
4. Schedule and conduct pre-construction meetings.
5. Coordinate all work on school campuses with DISTRICT administrative and school staff.
6. Provide project construction management services to include; conduct regular jobsite meetings, oversee quality assurance testing and inspection programs, monitor contractor and subcontractor work for deficiencies, maintain copy of all contract documents, change orders, and other documentation, oversee contractor and subcontractor safety program. Expedite communication, processing and documentation all contractors' submittals including RFI's, payments requests and change orders.
7. Monitor and manage the process of compliance with all applicable regulatory requirements, permitting and necessary approvals.
8. Process and track payment requests for approval.
9. Report potential budget and schedule variances and prepare recovery plans.
10. Administer post construction close-out, 3rd-party commissioning, start-up, and transition to operation including ensuring receipt of all operations and maintenance manuals and as-built drawings.
11. Assist in training DISTRICT Operations and Maintenance personnel on all completed projects.
12. Expedite final project close out and approval for final contractors' payments and assist in all post construction dispute resolution as necessary.
13. Assist in coordinating furnishings, fixtures and equipment acquisitions and installation as requested by the DISTRICT. The individual(s) responsible for this activity must be cognizant of Louisiana state procurement regulations.
14. Responsible for assisting the DISTRICT in the establishing a preventive maintenance program for each completed project.
15. Manage the one-year post construction warranty period on behalf of the DISTRICT, to include Architect and General Contractor.
16. Provide construction project cost and schedule reporting to the DISTRICT on a monthly basis.
17. Develop and update as necessary a construction inspection manual to provide guidelines for field inspection services consistent with national industry standards.

D. Field Inspection Services

The Contractor shall be responsible for providing field inspection services as necessary to ensure compliance to schedule, budget and quality contractual requirements including but not limited to the following:

- ***Responsibilities***
 1. Ensure that all contract drawings, terms and conditions are adhered to during the construction phase.
 2. Process contractor's payments and verify accuracy of paid quantities.
 3. Monitor the contractor's adherence to the safety plan and ensure that the contractors are providing adequate site security.
 4. Document Non-Conformance Reports (NCR) in case of non-conformance and monitor corrective actions.
 5. Verify that all addendums have been incorporated into the final plan set prior to start of construction.
 6. Ensure that work by other DISTRICT departments is coordinated with the on-site construction contractors.
 7. Manage and facilitate the implementation of all commissioning processes and guidelines through-out the project duration.
 8. Coordinate the building turn over process with the owner and contractors.

PART III: TECHNICAL REQUIREMENTS

- Successful proposer shall include one or more project team members who shall be a Louisiana license general contractor and a Project Management Professional certified from the Project Management Institute or other recognized Project Management professional societies.
- Successful proposer shall include one or more project team members with LEED Certification and a demonstrated experience with energy conservation principles, sustainability, maintainability and constructability.
- Successful proposer shall include one or more team members with a minimum of 5 years' experience, knowledge of and application of federal laws, regulations and policies that govern the FEMA Public Assistance and Hazard Mitigation programs. Knowledge and experience with HUD Community Development Block Grants, and application of federal laws, regulation and policies is also required.
- Successful proposer shall include one or more project team members with demonstrated experience effectively negotiating both the National Environmental Preservation Act (NEPA) compliance and the National Historic Preservation Act (NHPA) Section 106 requirements.
- Successful proposer shall include one or more project team members with demonstrated experience in educational facility planning.
- Successful proposer shall demonstrate extensive knowledge and experience with alternative project delivery methods, including (but not limited to) Construction Manager at Risk.
- Successful proposer shall demonstrate experience in successful management of a large-scale educational facilities building program.
- Successful proposers shall demonstrate experience with proactive dispute resolutions and claims avoidance.
- Successful proposer shall demonstrate experience with outreach and implementing Disadvantage Business Enterprise (DBE) programs.

