

Welcome

The Housing and Neighborhood
Department
City of Jacksonville

Neighborhood Stabilization Program
NSP

**NSP
BIDDING PROCESS &
CONSTRUCTION MANAGEMENT**

SINGLE FAMILY HOMES REHABILITATION

General Contractor Review Session

NSP
City of Jacksonville Leadership Team
Introductions

Omega Allen, *Project Manager*

Wight Greger, *Director HAND*

PART I

Bidding Process

Prosser Hallock, Inc.

PART II

Construction Management

Montgomery Land Company

Bidding Process Leadership Team Introductions

- Don Fullerton
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- Ryan Weilersbacher
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- Bruce Robbins
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- Daniel Blanchard
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Office Phone (904) 739-3655

Developer Selects Property for Review & Analysis

- Title
- Environmental
- Initial Condition Audit
- Survey
- Appraisals
- Financial Pro forma

Provided the Project complies
with all the NSP criteria, the
Property is accepted by the City
into the
NSP program.

Proceed with Bidding Process

General Contractor Selection Process

- Developer selects 3 GCs from the NSP/HAND approved and published list to bid each project.
- Developers rotate the GCs after each GC bids on 5 projects for the same Developer.
- One of the 3 GCs must be a JSEB.
- Developer may self perform as a GC if established as a GC 60 days prior to NSP program.

Developer May Self Perform as a GC

- Developer as a documented GC can be one of 3 bidders for Developer owned project.
- If lowest bidder, they may self-perform under the rules set forth for all General Contractors.
- A Developer who is also a GC, will not be allowed to serve as GC on projects owned by another Developer.

Bidding

- An Invitation to Bid will be sent to each GC selected by the Developer to bid.
- A bid package will be provided to each GC.

Contract Documents & Bid Package

- Invitation to Bid
- General Conditions
- Technical Specifications
- Documents and Forms
- Instructions to Bidders
- Scope of Work for Improvements
- Bid Proposal
 - Lump Sum Bid Proposal
 - Bid Worksheet

Invitation to Bid

- Developers Name
- Property Description & Location
- Bid Package Information
- Bid Submission Deadline
- Bid Opening, Location and Time

General Conditions, Technical Specifications & Documents and Forms

Standard for all Projects

NOTE:

**General Conditions includes Change
Order Provisions:**

Contractor Cost for Labor, Material & Supplies + 15%

Bid Package

- Instructions to Bidders
- Scope of Work for Improvements
- Bid Proposal
 - Lump Sum Bid Proposal
 - Bid

Instructions to Bidders

- Bid Submission Procedures
- Q & A Time Period
- Addendum Procedures
- Project Visit & Examination
- Rights to accept or reject bids based on non-compliance, irregularities, etc.

Scope of Work for Improvements

Prepared by:

Montgomery Land Company

Bid Proposal

- Bid Proposal
- Bid Worksheet

Bid Proposal

- Lump Sum Bid Amount
- Includes Applicable Taxes
- Schedule
- Submittal Statements
- Bid Expiration
- Signatures
- Addenda

Bid Worksheet

CONSTRUCTION BID WORKSHEET

Neighborhood Stabilization Program (NSP) CITY OF JACKSONVILLE

NOTE: This worksheet will be used to track participation of General Contractors and Subcontractors in the NSP program and will be used to assist in review of payment requests and evaluating change order requests. The General Contractor is also required to complete the attached Bid Proposal.

NSP PROJECT BID NUMBER: 09 - 12 - 0006 BID DUE DATE: June 8, 2009 PROJECT ZIP CODE: 32209
 PROJECT STREET ADDRESS: 4434 Center Street DEVELOPER: Western Partners, Inc.
 GENERAL CONTRACTOR (G.C.): HYR Contractors, Inc. G.C. ID NUMBER: 47 CK. IF G.C. IS A JSEB:

| WORK DESCRIPTION | The G.C. is required to submit a minimum of two quotes from Subcontractors for any task over \$1,500 which the G.C. is not self performing and document on this form the amount and note if the Sub declined to quote. | | | | | | | | | | | |
|---|--|----|--------------|--|---------------------------|----|------|-------------|----------------------|----|------|------------|
| | LIST ALL SUB-CONTRACTORS SELECTED BY GC FOR PROJECT | | | LIST ALL QUOTES FROM OTHER SUB-CONTRACTORS (Not part of the bid, for information only) | | | | | | | | |
| | Name | ID | JSEB | Amount | Name | ID | JSEB | Amount | Name | ID | JSEB | Amount |
| SECTION A - SUBCONTRACTORS (Work which the G.C. may not self perform) | | | Note % | | | | | | | | | |
| Electrical | Jones Electric Co. | 44 | | \$9,345.00 | Smith Wiring | 14 | | \$11,555.00 | | | | |
| Plumbing | ACE Plumbing, Inc. | 12 | | \$2,000.00 | You Flush It, Inc. | 41 | | \$1,720.00 | | | | |
| Landscaping | Florida Landscape Co. | 2 | 3.5% | \$1,300.00 | | | | | | | | |
| Roofing | Sky Roofing Co. | 5 | 16.3% | \$6,000.00 | Home Coverings, Inc. | 8 | | No Quote | Quality Roofs, Inc. | 17 | | \$5,500.00 |
| Painting | | | | | | | | | | | | |
| HVAC | Bufflinkin Heating | 45 | | \$1,948.00 | DRG Air, Inc. | | | \$2,200.00 | Flowease, Inc. | 38 | | \$2,050.00 |
| Pest Control | | | | | | | | | | | | |
| Structural Framing (Work requiring licensed certification) | | | | | | | | | | | | |
| Flooring | | | | | | | | | | | | |
| Window Installation (G.C. may self perform \$400 and less) | Clearview, Inc. | 9 | | \$2,500.00 | Florida Contractors, Inc. | 33 | | \$2,850.00 | Ben's Woodworks, LLC | 95 | X | \$2,700.00 |
| SECTION B - OTHER SUBCONTRACTORS | | | | | | | | | | | | |
| Insulation | Energy Savers, Inc. | 67 | 1.5% | \$567.00 | Whiles Contracting, LLC | 88 | X | \$788.00 | | | | |
| Drywall | MRS Drywall Co. | 98 | | \$1,760.00 | Certs Renovation, Inc. | 61 | | \$1,890.00 | Carl's Drywall | 3 | | No Quote |
| Chimney Work | Chimney & Vent Repair, Inc. | 4 | | \$345.00 | | | | | | | | |
| Other (attach additional page if necessary) | | | | | | | | | | | | |
| TOTAL SECTIONS A & B - ALL SELECTED SUBCONTRACTORS | | | | \$25,765.00 | | | | | | | | |
| SECTION C - G.C. SELF PERFORMING TASKS - MAX. 25% (List) | | | | | | | | | | | | |
| Sidewalk repair | | | | \$600.00 | | | | | | | | |
| Misc. clean up | | | | \$1,750.00 | | | | | | | | |
| Trim work | | | | \$450.00 | | | | | | | | |
| New deck | | | | \$1,200.00 | | | | | | | | |
| Window replacement | | | | \$340.00 | | | | | | | | |
| Other (attach additional page if necessary) | | | | | | | | | | | | |
| TOTAL SECTION C - G.C. SELF PERFORMING TASKS | | | 11.8% | \$4,340.00 | | | | | | | | |
| Percentage Self Performing Tasks (Maximum 25 % of Bid Subtotal) | | | | 14.4% | | | | | | | | |
| BID SUBTOTAL (Total of Sections A, B and C) | | | | \$30,105.00 | | | | | | | | |
| G.C. Profit & Overhead | | | 18.4% | \$6,800.00 | | | | | | | | |
| TOTAL BID AMOUNT | | | | \$36,905.00 | | | | | | | | |
| Total JSEB Participation (Minimum goal of 25% of Total Bid Amount) | | | 51.5% | | | | | | | | | |

NOTES:

- The Total Bid Amount should not include any contingencies for change orders. Change orders, if any, will be handled on a case by case basis.
- Please document on the worksheet the minimum JSEB participation of 25% of the Total Bid Amount.
- The General Contractor (G.C.) may self perform any tasks not listed in Section A up to a maximum of 25% of the Bid Subtotal amount, subject to any required licenses that may be required.
- The G.C. is encouraged to request multiple quotes for all work and is required to submit a minimum two quotes from Subcontractors for all work tasks over \$1,500 which the G.C. is not self performing and document the amount on this form and note if any Subcontractor declines to provide a quote. The G.C. may request any number of quotes from the approved NSP list of Subcontractors and is not obligated to select the lowest quote.

GC Choose Subcontractors from NSP list

- The GC will choose their own Subcontractors from the NSP approved lists of Subcontractors to be provided.
- The GC is encouraged to request multiple quotes for all work, however the GC is required to request and submit a minimum of two quotes for each trade and work tasks over \$1,500, except for tasks which the GC is self performing.
- After receipt of the quotes from the Subcontractors, the GC will choose the subcontractors of their choice for the project as part of the lump sum bid.
- The GC will document the minimum JSEB participation of 25 % of the Total Bid Amount.

GC's Ability to Self Perform

- The GC will be allowed to self perform certain tasks up a maximum of 25% of the Bid Subtotal, which does not include GC overhead and profit.
- Work tasks which the GC will **not** be permitted to self perform are specifically listed.

Work tasks and trades which the GC will not be permitted to self perform:

- Electrical
- Plumbing
- Landscaping
- Roofing
- Painting
- HVAC
- Pest Control
- Structural Framing
- Flooring
- Window Installation over \$400

Bidding

- The Invitation to Bid will be sent to each GC selected by the Developer to Bid.
- A bid package will be provided to each GC.
- Based on the Instructions to Bidders, bids will be due at an established date, time and place each week.
- All bids will be time stamped upon receipt and the bids for each property will be publicly opened and read aloud.
- Within two days, bids will be recorded and evaluated for each property and the lowest bidder will be formally identified.
- Subject to the Developer's final financial pro forma and project approval, the low bid will be awarded, and the Contract Agreement will be executed between the Developer and the GC with City oversight.

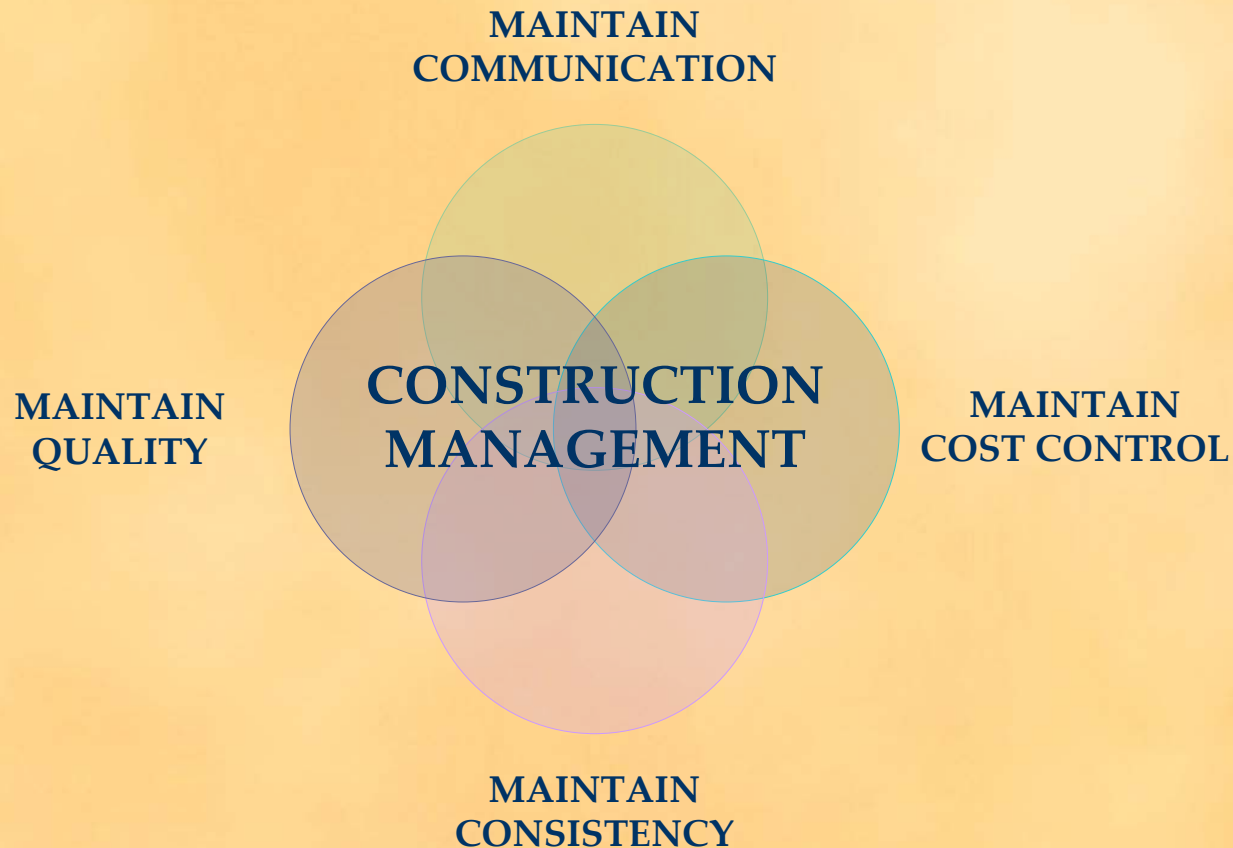
WELCOME TO THE PROGRAM

Construction Management Leadership Team Introductions

- Maurice M. Rudolph, P.E.
Senior Vice President
maurice@montgomerylandco.com
- Marcus Meide,
Construction Director - Certified Building Contractor
marcus@montgomerylandco.com
- **Bob Pitman,**
NSP Program Manager
bpittman1066@yahoo.com
- Eugene Barber
President of EUCON, LLC – JSEB
eugenebarber@euconllc.com

Office Phone (904) 683-0207
Office FAX (904) 683-0244

Construction Management Approach



PRE-CONSTRUCTION MEETING

- Permit Review
- NOC Review
- Schedule Review
- Safety Review (OSHA Based)
- General Conditions & Specifications Review
- Contractor Evaluation Review
- NSP Expectation Review

GENERAL SITE PREPARATION

- Onsite NSP Signage by Developer
- Permit Box Placement By GC
- Establish Neighbor Contact (Developer & GC)
- Dumpster Guidelines
- Submit Construction Start Date to Montgomery Land Company (904) 683-0207

CONSTRUCTION MANAGEMENT During Construction

- Safety Inspections
- Evaluate Changes in Scope of Work
- Ongoing Project Contractor Team Evaluation
- Ongoing Monitoring of Schedule
- Review Draw Requests for NSP
- Overall Construction Supervision for Quality and Cost Control for the NSP

CONSTRUCTION MANAGEMENT

Finalizing Construction

- Create Project Punch List
- Conduct Final Inspection to Ensure Adherence to NSP Criteria
- Facilitate Resolution of Outstanding Items
- Process Final Draw Request
 - Lien Releases
 - Certificate of Occupancy

Project Closeout

- Final Inventory of the house
- Submit Contractor Evaluation to NSP Project Manager
- Submit Final Paperwork to NSP Project Manager.

The NSP program reserves right to revise policy and procedure as it may deem necessary in order to comply with municipal or federal requirements as they currently exist or may exist in the future.

Thank You for Your Time.

MONTGOMERY LAND COMPANY

(904) 683-0207

&

PROSSER HALLOCK, INC.

(904) 739-3655

We Appreciate Your
Questions and Comments at Any Time