



SCHOOL DISTRICT OF MILTON

OPPORTUNITY • ACHIEVEMENT
COMMUNITY

Request for Proposal Owner's Representative Services

RFP Issued: Wednesday, Sept. 13, 2017

Proposal Deadline: Wednesday, Oct. 4, 2017

Estimated Notification of Award: Wednesday, Nov. 1, 2017*

*Award will be contingent upon a successful November 7, 2017 Capital Referendum

Description

The School District of Milton (“District”) will accept responses to this Request for Proposal (RFP) from qualified firms to provide owner’s representative services for the 2017 bond funded referendum projects listed below. The purpose of this request is to retain a qualified owner’s representative who will act as liaison between and among the District, architects, contractors and other interested parties, representing the District’s interests and to provide advice, guidance and professional opinions pertaining to design, constructability and project coordination. It is expected that the projects will be completed in a planned process on or before August 31, 2020. The architect for the projects is Plunkett Raysich Architects, LLP and the construction manager/prime contractor for the projects is JP Cullen. JP Cullen will be bidding out any services which they wish to self-perform. Our bonded projects total **\$69,900,000** and are budgeted as follows based on preliminary analysis information:

- New high school for 1,200 students with core spaces (e.g. library, cafeteria/commons and gyms) built for up to 1,400 students; remodel/convert existing high school to middle school - **\$68,050,000**
- Construction of a new wing at Milton East Elementary - **\$1,850,000**

Scope of Project

The overall scope of the project will include new construction of an approximately 320,000-square-foot high school, anticipated to begin construction in May of 2018 and complete construction by September of 2020. The second major scope component will be remodeling of the existing high school building to convert to a middle school budgeted at approximately \$1.2 million, anticipated to begin construction immediately following the 2019-20 school year and complete construction by no later than September of 2020. The final major scope component will be an 8,000-square-foot classroom addition at East Elementary School, anticipated to begin construction following completion of the 2017-18 school year and complete construction by no later than December of 2018.

Scope of Services

The services to be provided by the selected OWNER’S REPRESENTATIVE will include, but not necessarily be limited to the following:

Schematic Design\Design Development Phase

- Serve as a member of the design team.
- Review conceptual, design development and working drawings to determine if the facility will satisfy the owner’s performance requirements.

- Participate in construction document review, attend all design meetings, and review construction documents for completeness and accuracy, providing guidance pertaining to constructability and logistics.
- Monitor design schedule. Monitor the design process by reviewing design documents for thoroughness and code compliance. Review cost estimates in each phase of the design process.
- Assist with value engineering and energy efficiency design protocols. Assist with constructability analysis.
- Research construction materials and technical facility systems. Confirm final selection of components and systems with owner.

Bid Phase (general contractor self-performed work and subcontractors)

- Coordinate with the District and its consultants regarding bid document preparation, bidding strategies and evaluation of bids.
- Collect all bids
- Attend pre-bid conferences.
- Assist in the bid review process for self-performed general construction work as well as subcontractor's work.
- Assist District in evaluation of bid responses and bid award in alignment with project master budgets.

Construction Phase

- Attend pre-construction meetings.
- Provide on-site construction observation to the extent required to resolve discrepancies between project design team, architects and contractors as well as to insure the appropriate means and methods of construction are applied and plans/specifications are followed.
- Monitor general and contractors' work to assure conformance to codes and project design specifications.
- Serve as the liaison between the architect, contractor and owner bringing significant or unresolved disparities to the owner with advice as to the appropriate resolutions.
- Attend weekly job site meetings and provide overview reports to the owner.

- Witness and document quality assurance testing, inspection and commissioning procedures.
- Monitor project and recommend any special testing needed in coordination with architects/engineers.
- Maintain a file of all contract documents, including contracts with architects and contractors, plans and specifications, correspondence, meeting notes, reports and change orders.
- Provide the initial review of all change orders, working with the contractors, architect and owner to resolve or provide recommendations for approval or denial.
- Provide photo documentation of projects illustrating work progress and construction techniques or hidden aspects of the project for future use in renovations and repairs.
- In collaboration with the architect, review punch lists and monitor project close out documents to insure completeness.
- All other tasks that represent job accuracy, quality assurance and compliance with construction methods in the owner's best interests for a properly designed, installed and completed project.

Move-in/Occupancy

- Assist consultants in review of construction and establishment of punch lists.
- Preview and verify written guarantees, warranties, service records and commissioning work
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- Participate in construction contract close-out activities including final payment and release of retainage.
- Coordinate with contractor to resolve warranty issues.
- Coordinate a thorough one-year warranty walk-through to occur approximately 10 months after taking occupancy. This walk-through, with all necessary parties in attendance, will ensure any issues are resolved in a timely manner before the warranty expiration date.
- Track energy performance against design goals for one year after completion and, if the building is not meeting design goals, assist the owner with determining cause and implementation of remediation.

Information to be Submitted

Proposals should include the following information, presented in a clear, comprehensive and concise manner to illustrate the firm's capabilities and technical approach to work of this nature.

1. Cover letter.
2. Firm name, business address, telephone number, fax number, email address, and contact person.
3. A general description of your company, including number of employees (FTE), years of operation and customer base.
4. Detail your firm's experience as owner's representative of similar sized projects in the last ten years.
5. A list of all individuals to be involved in the process and a brief description of their role, qualifications and billable rate. Please identify the main District contact person at your firm during each significant phase of the project. Include resumes for all key individuals to be involved in the work of the project.
6. Provide a description of your work approach to the tasks and objectives identified in the Scope of Services. Any concepts, techniques and tools you intend to utilize in the work should be included in your proposal.
7. Please share your experience working with various construction means and methods.
8. Describe your intended relationship with the School District of Milton and other team members, including the architects, consultants and contractors as well as your approach to administering and coordinating the services of each. Describe the communication process and tools you use to inform the Board of Education and administrative/supervisory staff, including, but not limited to, reconciliation and tracking of project revenues and expenses.
9. Provide a description of all additional subcontracts and associations with other entities you propose to utilize in the performance of this work. Explain fully the intended working relationships and responsibilities of each entity.
10. References from at least three clients for whom comparable work has been performed. This list shall include client name, person to contact, address, telephone number, email address, description of services provided and the dates of the project. Include contact information for the architect and general contractor for any projects cited.
11. Lawsuits filed against your company in the past ten years.

RFP Submission Process/Timelines

Please submit all materials via US postal mail or hand delivery to:

Mary Ellen Van Valin
Director of Business Services
School District of Milton
448 E. High Street
Milton, WI 53563
vanvalinm@milton.k12.wi.us
(608) 868-9207

Proposal Deadline

Proposals must be received by Mary Ellen Van Valin, at the address indicated above, no later than **1:00 p.m. on Wednesday, October 4, 2017**. Each firm submitting a proposal must submit:

- one (1) original and two (2) copies in a sealed envelope.

Sealed proposals shall be clearly marked "Proposal for Owner's Representative Services" and shall clearly identify the proposing firm submitting the proposal.

Following the proposal deadline, the District shall review and evaluate proposals and submissions. The District may select one or more proposing firms for interview. Proposals shall be reviewed by a select committee of the Board of Education of the School District of Milton, with a recommendation to the Board of Education for approval. A final award shall be subject to entry into a formal written contract between the selected firm and the District.

Special Notes

All submitted proposals and information shall be the exclusive property of the School District of Milton.

Prices quoted should not include federal excise or transportation taxes, nor State or sales tax as the School District of Milton is exempt from such taxes. An exemption certificate will be furnished if required.

To the extent permitted by law, it is the intention of the District to withhold the contents of proposals, contracts, if any, and any other submitted documents, from public view until such times as the competitive or bargaining reasons no longer require non-disclosure (or other reasons support nondisclosure) in the opinion of the District. After that time, all proposals, and any resulting contracts, and all other submitted documents in connection with this RFP, may be available for review in accordance with Wisconsin Open Records Law, to the extent permitted by law.

General Terms and Conditions

The Board of Education of the School District of Milton reserves the right, at its discretion and based on what it determines to be in its best interests, to accept or reject any and all RFP submittals; to void this RFP and the review process and/or to terminate negotiations with any or all responding parties at any time; to select a final party or parties from among the proposals received in response to this RFP, and to negotiate terms with the selected proposer. Any and all RFP terms, elements, requirements and schedules are subject to change and modification, at the discretion of the District. The District further reserves the unqualified right to modify, suspend, or terminate at its sole discretion any and all aspects of this RFP process, to obtain further information from any and all responding parties, and to waive any defects or irregularities as to form or content of the RFP or any responses by any party.

Questions regarding this communication and/or information requested should to be directed to:

Mary Ellen Van Valin
Director of Business Services
School District of Milton
448 E. High Street
Milton, WI 53563
vanvalinm@milton.k12.wi.us
(608) 868-9207