



**Business Services  
Department**  
1633 Keeler Avenue  
Beloit, WI 53511

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**SCHOOL DISTRICT  
OF BELOIT REQUEST  
FOR Proposal (RFP)**

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RFP 2022-005  
Request for Proposal

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April 18, 2022

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## PROJECT DESCRIPTION

### A. Overview

The Beloit School District (the "District") requests detailed responses regarding the design/build services to engineer and implement HVAC upgrades at Beloit Memorial High School. This investment is associated with federal ESSER funds and must align with associate requirements and timelines. The Respondent/Vendor is encouraged to closely review this RFP in preparation for formal proposal submittal.

The District has retained the services of Cadence Consulting, LLC to act as the District's Owner's Representative for this effort. All correspondence associated with this selection process is to be directed to Michael A. Hacker, Cadence Consulting, LLC (michaelahacker@outlook.com).

### Project Site:

Beloit Memorial High School  
1225 4th St  
Beloit, WI 53511

### B. Design / Build Project Delivery

The District intends to enter into a single contract with a partner who would provide, perform, and oversee the completion of all efforts associated with this project. The district expects to execute an AIA-A141 Standard Form of Agreement Between Owner and Designer-Builder contract with the selected vendor. The vendor is expected to hold all additional contracts associated with the project. See the requested proposal materials for details of proposing vendor services and sub-consultants.

### C. Project Phasing

In alignment with the sign agreement, the vendor, and their associated sub-consultants, are to provide all necessary services to execute the following project phases. The vendor will be required to receive approval prior to proceeding to subsequent phases, and will be asked to develop a detailed working schedule for each phase in alignment with the district goals, and funding requirements.

1. **Scope Verification:** This initial project phase aims to establish a clear definition and extent of project scope. Through existing building tours, existing drawings, review of prior system studies/reports, and client meetings, the project scoping verification will fully define the project program and performance goals, outline product/manufacture and system alignment, establish total project scale, and will develop detailed budget models. In addition, the development of detailed project schedules for design/engineering, bidding and construction will be completed. Outcomes of this phase will establish the basis of work for the subsequent phases as well as the target project budget.
2. **Design / Engineering:** Through continued, regular, client engagement, the Vendor will utilize this project phase to fully design and engineer the project solution. Final deliverable documents from this phase will be utilized for bidding, permitting, and construction documentation. This effort is to include the development of a Sequence of Operations. Budgets are to be updated regularly to ensure alignment with identified scope.
3. **Bidding:** The Vendor is responsible to administer a complete, competitive bidding process. The District expects to be included in the bidding, vetting, and selection process; and retains the right to communicate preferences related to bidding vendors based on experience with the district. If a

Vendor is self-performing any component of the construction project, they must submit bids separately to the district and make an earnest effort to solicit additional bids in these categories.

4. **Construction:** The Vendor is responsible for complete construction management and oversight. The Vendor, and selected subcontractors, are responsible for all local and state approvals, construction permitting, and inspections associated with the project. The Vendor is required to host regular on-site construction meetings to review project status, coordinate open decision items, and guide a tour of site to review progress updates. Note, it is expected that construction will occur during the school year within an active school; Vendor will be responsible for providing a safety plan with ongoing updates and procedural coordination.
5. **Closeout:** Upon substantial completion the Vendor is to administer training for all installed systems and equipment. Training sessions are to be recorded. Project Operations and Maintenance (O&M) manuals and all product warranty information is to be compiled and delivered to the district for their records. In addition, a measurement and verification effort is to include an in-warranty service agreement.

#### **D. Project Scope**

The District has identified the following projects that are to be used as basis for the preliminary project scope understanding – all projects are at Beloit Memorial High School. The District reserves the right to change the size and scope of each individual project, as well as the overall project.

- **Building-wide DDC Conversion:** Controls replacement of pneumatic to DDC conversion, building-wide
  - DDC integration with Pool, Fitness, and Little Theater
  - Non-proprietary controller equipment and systems
    - ABB frequency drives and Alerton-Honeywell controls
- **Air Conditioning:** Chilled water, air-cooled equipment additions, and updates, to the existing air handling units to serve the entire existing third floor.
  - System solution is to have seamless expandability to add additional equipment to serve additional areas during future projects.
  - Add variable frequency drives to existing pumps and air handlers, and fix insulation
- **Ventilation Improvements:** Extend existing air handling unit ductwork and needed systems upgrades to meet code compliance in identified building areas.
- **Testing and Balancing:** Complete testing and balancing building-wide.
  - Including science hood systems, Technical Education exhaust

#### **E. Elementary and Secondary School Emergency Relief Fund (ESSER)**

This project is being funded through federal resources as part of the Elementary and Secondary School Emergency Relief (ESESII) funds. These one-time funds are to be utilized to prevent, prepare for, and respond to COVID-19. All associated ESSER funds are to be distributed by September 1, 2023. The selected vendor will be asked to support the district with any needed project summary information, project reporting, or required documentation.

#### **F. Incentives / Rebates**

It is expected that the Vendor will work with the District to pursue and obtain any and all possible/practical rebates, grants or other funding for the projects outlined in the Scope of Work and the detailed report prepared by the Vendor in order to minimize the impact on the District taxpayers wherever possible.

## **PROPOSAL RESPONSE FORMAT**

Responses shall be submitted in the format outlined in this section. Each proposal will be reviewed to determine if it is complete prior to actual evaluation. The District reserves the right to eliminate from further consideration any proposal deemed to be substantially or materially unresponsive to the requests for information contained herein.

### **A. Contractor Qualifications**

Each proposal must include the following information regarding your Firm's qualifications:

1. Provide the general background information of your company including address, contact information, firm type, tax identification numbers, and the year established.
2. Provide a complete overview of your firm including personnel assigned to this project. To include but not be limited to their responsibility, individual backgrounds, industry experience, etc.
3. Provide your firm's expertise in assisting school districts on similar project types, including experience with ESSER-related projects.
4. Provide your firm's expertise in managing environmental hazards and how your firm will manage any environmental issues that arise during the project.
5. Disclose any and all litigation that your firm has been involved with in the last five years related to public school district projects. Failure to disclose law suits filed against your firm will result in immediate disqualification.
6. Provide three (3) references of projects performed by the Respondent for school districts in the last three years including proof of relationships of longevity with school districts.

### **B. Project Approach, Staffing, and Management**

1. Provide a clear project approach based on the project phasing provided. Overlay your timeline on a suggested preliminary timeline.
2. The Respondent should indicate how they will partner with the District in managing and supervising the project. The District expects a minimum of bi-weekly on-site meetings / construction site visits.
3. The Respondent should provide clarity on the overall proposed project team; including roles and responsibilities during all project phases. This section should also indicate professional experience between the primary Vendor and each sub-consultant.
  - a. For the construction phase, clearly describe the types of services (both professional and construction services) that your organization self-performs, and/or the services you offer through subcontractors. All self-performance work will be required to be competitively bid; provide approach to satisfy this requirement.

### **C. Fee Proposal**

It is the intent of the district to enter into a single-source contract for design/build services. The district retains the right to terminate the relationship at any phase if it deems necessary. The below requested fee proposal is intended to provide additional clarity on services, fee structure, and proposed fees/rates of your organization for this project. Utilize the provided Hypothetical Project Description (see below) as the basis of this proposal. The district retains the right to further assess, request additional clarification, and negotiate the submitted fee proposal.

**1. Design / Engineering Fee:** The Design / Engineering Fee is to be provided as a percentage fee based on the cost-of-work (construction cost) sliding scale below, assuming utilization of AIA-A141, or similar Consensusdocs, contract terms/conditions for construction management services and insurance. This fee is to be inclusive of all services associated with Scope Verification phase through Bidding.

\$5,000,000 or less	_____ %
\$5,000,001 - \$10,000,000	_____ %

**2. Construction Management Fee:** The Construction Management Fee is to be provided as a percentage fee based on the cost-of-work sliding scale below.

\$5,000,000 or less	_____ %
\$5,000,001 - \$10,000,000	_____ %

**3. General Liability Insurance:** \_\_\_\_\_ %

**4. Payment of Performance Bonding:** \_\_\_\_\_ %

**5. General Conditions Fee:** \$ \_\_\_\_\_ / Month

General Conditions Fee: General conditions are to be a proposed as a single monthly not-to-exceed value based on the hypothetical project as outlined below. Provide a detailed, itemized list of all services, staff / personnel, technology, equipment, communications, etc. included within this fee – also include each item’s monthly rate. Unless otherwise identified, it is assumed that any services not included in the General Conditions are included within the Construction Management Fee.

**6. Additional Services:** Please provide a list of any additional services, including associated rates, not included in the Design/Engineering Fee, Construction Management Fee, or General Conditions, which would be, if needed, proposed separately (BIM/visualization, 3D building scanning, controls software maintenance, etc.).

**7. General Requirements:** It is understood that other General Requirements would be reimbursed on an actual cost basis as determined by the project scope and delivery schedule. Please provide a detailed list of all assumed General Requirement line items which are not included in the provided General Conditions – list of items only, associated rates not required.

**8. Reimbursable Expenses:** Provide a list of any reimbursable expenses not included in the above Pre-Construction Fee.

**9. Service Agreement Rates:** Provide a service agreement description with terms providing support for a 1–3-year duration.

**Hypothetical Project Description:** The below is provided solely for generating a basis for the requested General Conditions fee proposal; the final project scope, schedule and costs will vary.

**Scope:** Projects as identified in Project Description / D. Projects above.

**Construction Cost:** \$4,500,000

**Construction Schedule:** 12 months

**Construction Delivery Notes:**

- Project delivery assumes multiple construction phases, mobilizations, and possibly multiple bid packages.
- Construction would occur congruent with the school year, in/around an active school building and site.

## **SELECTION PROCESS**

### **A. Timetable**

The District expects to undertake the selection process described below according to the following schedule:

1. Advertise Request for Qualifications	Thursday, April 21, 2022
2. Pre-proposal Conference / Site Visit	Friday, May 6, 2022
3. Questions related to projects to be submitted by	Tuesday, May 10, 2022 by 2pm
4. Answer to related questions	Friday, May 13, 2022
5. Proposal Submittal Deadline	Thursday, May 19, 2022 at 2pm
6. Selection of Vendor	Estimated May 2022
8. Award of Contract	Estimated June 2022

### **B. Pre-proposal Conference / Site Visit**

The Pre-proposal Conference / Site Visit will occur on **Friday, May 6 at 9:30 a.m. at Beloit Memorial High School, 1225 4th St, Beloit, WI 53511**. This is mandatory for any submitting Vendor, and is strongly encouraged for any/all primary subconsultants.

### **C. Proposal Evaluation**

Responses will be evaluated on the basis of the following criteria:

#### **1. Contractor Qualifications**

Preference will be given to Respondents that have demonstrated success providing the technical services being requested by the District and that can provide the services to the District the most efficiently and cost effectively.

#### **2. Project Management**

Preference will be given to Respondents that outline clear approaches to project management and supervision, commissioning, training and measurement and verification. Complete transparency of all underlying bids, including the District in the sub-contracting process, and clear communication of any and all change orders will be expected.

#### **3. Proposed Fees**

Preference will be given to the proposals that responsibly maximize the net economic benefit to the District and responsibly minimize the risk to the District.

## **INSTRUCTIONS FOR SUBMITTING PROPOSALS**

### **A. Requests for Further Information**

Questions concerning this RFQ and the procedures for responding to the RFQ should be directed to Michael A. Hacker, Cadence Consulting (michaelahacker@outlook.com) by **Tuesday, May 10, 2022 @ 2:00pm**. Questions should be submitted in writing, and responses will be issued to all interested vendors.

### **B. Submission of Proposals**

Proposal responses to this RFQ must be received no later Thursday, May 19 @ 2:00pm. Both, an electronic copy, AND hard copies are to be submitted as outlined below:

#### **Electronic Copy:**

Michael A. Hacker, Cadence Consulting (michaelahacker@outlook.com)

#### **Hard Copies:** Provide (x2) bound hard copies

Sean Winters  
School District of Beloit  
1430 4<sup>th</sup> Street  
Beloit, WI 53511

### **C. Right to Reject**

In submitting a Proposal Response, it is understood by the Respondent that the right is reserved by the District to accept any response in any and all parts, to reject any and all responses, and to waive any irregularities or informalities, which are in the best interest of the District.

### **D. Cost of Proposal Preparation**

The cost of preparing a response to this RFQ will not be reimbursed by the District.

## RESPONDENT ACKNOWLEDGMENT OF RFQ REQUIREMENTS

The undersigned declares that he/she has carefully examined the instructions and specifications contained in the RFQ and will furnish the properties and services set forth in its sealed response. Include this signed acknowledgement within submitted proposal.

Name of Company: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone/Fax: \_\_\_\_\_

Representative/Title: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_