

REQUEST FOR QUALIFICATIONS &  
PROPOSAL OWNER'S REPRESENTATIVE  
SERVICES

**Request for  
Qualifications  
& Proposal  
Owner's Representative  
Services  
For  
Indian Prairie CUSD 204**

*In accordance with Federal law, this institution is prohibited from discriminating on the basis of race, color, national origin, sex, age, or disability.*

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**REQUEST FOR QUALIFICATIONS & PROPOSAL**

**Introduction**

The Board of Education for **Indian Prairie School District 204** is soliciting Statements of Interest, Qualifications and Proposals from qualified firms to provide Owner's Representative Services to assist the School District in the planning (pre-construction), bidding, construction, close-out and occupancy of the planned improvements. The scope of the work is further outlined in the Project Information section.

This RFQ/P will be evaluated on the basis of the relative merits of the qualifications and pricing. There will be no public opening or reading of responses received by the School District pursuant to this request.

**RFQ&P Submission**

RFQ&P submissions are due by **January 14, 2025** before 12:00 p.m. CST.

**Indian Prairie School District 204  
780 Shoreline Rd  
Aurora, IL 60504**

Qualifications must be enclosed in a sealed envelope (or other sealed container): the submission must clearly display "**Request for Proposal – Owner's Representative Services**" for **IPSD 204** and the respondent's company name.

Submittals should be prepared as standard 8-1/2" x 11" letter size via PDF, and shall be limited to 50 pages, exclusive of required attachments. Front and back covers, table of contents pages and tabbed divider pages will not be counted if they do not contain submittal information. The information should be submitted in a double sided, readable, and/or bound in a book format. Electronic submissions should also be sent, but five (5) hard copies must be submitted. Timely delivery of submissions is the responsibility of the Respondent.

The District requests information via electronic submission via email to:

**Matt Shipley**  
**Chief School Business Official**  
[matthew\\_shipley@ipsd.org](mailto:matthew_shipley@ipsd.org)

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**Anticipated District Schedule to Award the OR Services**

RFQ/P Released	<b>Dec 20, 2024</b>
Last date to submit questions/clarifications	<b>Jan 8, 2025</b>
RFQ/P Due to District	<b>Jan 14, 2025</b>
RFQ/P Interview List Released	<b>Jan 17, 2025</b>
Interview Process	<b>Jan 23, 2025</b>
Administrative Recommendation for Board Approval	<b>Feb 3, 2025</b>

**Respondents' Inquiries and Addenda**

All questions shall be submitted in writing to John Robinson, Director of Building Operations via email ([john\\_robinson@ipsd.org](mailto:john_robinson@ipsd.org)). Any responses to questions, or changes in this RFQ/P, shall be issued in writing as an addendum. Oral and other interpretations or clarifications will be without legal effect.

**General Information and Notifications**

Respondents are advised to carefully review all sections of this RFQ/P carefully, and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the submission. Qualifications which depart from or materially alter the terms, requirements, or scope of work defined by this Request may be rejected as being non-responsive.

Joint venture and cooperative qualifications may be considered, provided that their use is clearly indicated in the submitted qualifications.

**Purpose**

The purpose of this Request for Qualifications / Proposal is to identify an experienced Owner's Representative Services firm with the best combination of qualifications, to develop and assist the owner's program efficiently and effectively with respect to process, quality control, safety, time and cost.

**Owner's Representative (OR)**

The primary role of the Owner's Representative is to act as the District's project point person responsible for the day-to-day management of activities of the District in its role as the owner.

As the point person, the Owner's Representative is the District's project leader responsible to oversee and coordinate the activities of the District's design and construction team and to provide the primary coordination between the District (Board of Education, Building Operations, Administration and Staff) and the design and construction team. The Owner's Representative works closely with and reports to the Director of Building Operations in the

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financial administration of the project as it relates to budget status and reporting, contract change order approval, and project financial tracking and reporting for the District. All direction and communication with all entities of the project from the District runs through and is coordinated by the Owner's Representative under the direction of the Director of Building Operations.

The Owner's Representative, as the District's agent, is responsible to represent and advocate for the District's interests in working with all entities of the project during all stages of the project. In this capacity, the Owner's Representative will work closely with key District officers, District administration, the Board of Education, building principals, other District staff, related programs and organizations as required.

A more detailed explanation of services can be found in Appendix A

### **General Terms & Conditions**

The District reserves the right to award contracts for various projects to multiple or single respondents. The School District reserves the right to waive informalities and irregularities in the qualifications received. The School District reserves the right to terminate this RFQ/P at any stage and/or reissue a subsequent solicitation. The District will remedy or waive technical errors in the RFQ/P process when in the best interest of the District.

The Respondent(s) whose submittal(s) is deemed to be the most qualified, advantageous and in the School District's best interests as determined by the Administration may be submitted to the Board of Education for approval. The Board of Education may act to approve, reject or delay award of the contract based on the recommendation of the selection committee.

The School District reserves the right to contact any Respondent for clarification, additional interviews, negotiate or terminate negotiations if such is deemed desirable by the School District.

All proposals must comply with applicable Illinois law including the payment of prevailing wages by all contractors working on public work projects and Criminal Background Investigation. Proposals must comply with the Illinois statutory requirements regarding labor, including equal employment opportunity laws.

All costs associated with developing or submitting proposals in response to this request, or to provide oral or written clarification of its content shall be borne by the respondent. The School District assumes no responsibility for these costs. This RFQ/P does not commit the School District to pay any costs incurred in preparation for submission of a response or in anticipation of a contract.

This RFQ/P does not commit the School District to enter into a contract. The School District reserves the right to reject any/all submissions, award one contract, award multiple

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contracts, or delay award of contract(s) beyond the date specified, in response to this RFQ/P.

### **Selection Criteria and Process**

The tentative date for the interview (subject to change as may be required) is **Jan 23, 2025**. A reasonable inquiry for additional information may be conducted by the District as to respondents' past performance, financial stability, and ability to perform on schedule, within budget, and in a fashion which results in customer satisfaction with quality results.

The timing of the research may precede or follow the interview process as determined in the best interest of the District. Respondents are solely responsible to promptly supply additional information to the District in connection with such inquiries. The promptness, accuracy, and cooperation of respondents in responding to such inquiries may be grounds for determination of non-responsiveness as determined by the District.

A final evaluation of all the presenting Respondents will be made by the Selection Committee in order to determine the best qualified for the project. The Selection Committee shall determine the selection of respondents for the interview process by reviewing the written qualifications of the respondents based on the responses to the RFQ/P. A "short list" of firms will be developed. These firms will be invited to an interview with the Selection Committee. The interview will be a sixty (60) minute format with a twenty (20) minute presentation of how the firm would approach the program and up to forty (40) minutes of Q&A.

The Selection Committee will be making a recommendation to the Administration on the chosen Respondent upon completion of the interview process. The Selection Committee may rank the firms making the presentations to determine a recommendation or immediately reach a recommendation. Each of the interviewed respondents shall be evaluated on their qualifications and cost structure.

Recommendation by the Selection Committee is based on the combination of the proposer's response to the Submittal Requirements, the composition and qualifications of the proposer's staff for this project, the interview process, and proposed fees and costs. The Administration will review the Selection Committee's recommended firm, and if a concurring recommendation is rendered, the Administration will advance and agreement with the firm to the Board of Education for approval.

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## **School District Background**

The District is a public, PreK-12 District, serving nearly 27,000 students in 35 buildings. The District is located in DuPage and Will counties, and serves portions of Aurora, Naperville, Bolingbrook and Plainfield.

The District has a Pre-School Center serving a blended population of 3–5-year-old special needs, low income and tuition-based students, twenty-one (21) grades K-5 elementary schools, seven (7) grades 6-8 middle schools, three (3) comprehensive high schools, a credit recovery high school serving 4<sup>th</sup> year students from all three high schools, and a transition program supporting training experiences post high school.

The District's Strategic Plan, entitled *Inspire, Innovate and Empower the Future*, guides our work.

More can be found on the Indian Prairie School District website at [www.ipspd.org](http://www.ipspd.org).

## **Building Operations Team Facility Background and Project Information**

The current building operations department includes one Director of Building Operations and two Project Managers. All building operations staff have many years of facility management experience in K-12 education. The District outsources all custodial, maintenance, and grounds services to Aramark. The District has successfully managed many capital projects in recent years, including various parking lot replacements, flooring renovations, new playgrounds, roofing replacements, HVAC improvements, and other miscellaneous projects.

The Owner's Representative will be expected to work collaboratively with the building operations team and make recommendations on how to maximize the skills, knowledge and experience of district and Aramark employees.

The Board of Education approved a Master Facility Plan in December, 2023. The plan is available at: <https://www.ipspd.org/Page/2784>.

District voters approved a \$420 million bond referendum in November, 2024. The referendum will fund the most important work identified in the master facility plan. Communications and timelines that were shared with community, and outline the project plan, are available at: <https://www.ipspd.org/Page/2818>.

Subsequent to the passage of the referendum, the District began design work on multiple projects. The work already authorized can be accessed by reviewing board meeting agendas and minutes at: <https://go.boarddocs.com/il/ipspd/Board.nsf/Public>.

Prior referendums funded the construction of district facilities in the 1990's and 2000's. During these projects, the district employed project managers to manage significant

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construction work. The District's intention is to utilize an Owner's Representative in lieu of hiring additional project managers for the current project.

Individual projects, contracts, budgets and funding are subject to the review and approval of the Board of Education. The Board may suspend the project at any stage up to and including following receipt of bids.

**Total Anticipated Budget for the Cost of Work:           \$420,000,000**  
**Total Anticipated Duration of the Work:                   8 years**

### **Submittal Requirements to be provided by the Owner's Representative Applicants**

Qualifications should include information regarding the proposer's experience and approach relating to the subsequent design and construction phases of the Project. RFQ/P submission must include the following:

1. **Letter of Transmittal:** A one-page Letter of Transmittal signed by an owner, officer, or authorized agent of the firm or organization, acknowledging and accepting the terms and conditions of this Request. The letter must contain a commitment to provide both the services described herein and the personnel proposed for the assignment. The Letter of Transmittal should identify all addenda received by the Respondent. Joint Ventures require signatures from all firms participating in the Venture.
2. **Executive Summary:** The executive summary is intended to highlight the contents of the Proposal and to provide the School District evaluators with a broad understanding of the Respondent's technical approach and ability.
3. **General Information:**
  - a) Name, address and telephone of firm including involvement in industry organizations.
  - b) Name and title of contact person.
  - c) Name of officers in the firm and an organizational chart (one page).
  - d) Brief history of the firm (one page).
  - e) Overview of specific qualifications and projects within the K-12 school market
  - f) Names of school districts and descriptions of the work performed by your firm for projects similar to Project described herein in size, scope and complexity.
  - g) Additional information that the Respondent feels is a unique qualification and is of direct benefit to the District.
4. **Project Staffing:** The education, training and qualifications of the proposed Project staff including as appropriate: Principal-in-Charge / Project Executive, Project Manager, and Construction Representative for this Project. Describe total experience in Owner's Representation of each of the proposed Project Team Members. Note separately projects performed by personnel while with another firm

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and/or organization. (Please note that each OR may vary the type and amount of staff assigned to the Project. Each OR will have to justify the inclusion or exclusion of staff for the Project. The District will make a selection based on their unique needs and desires)

- a) Principal-in-Charge / Project Executive (recommended 15 years' experience in K-12 Projects).
- b) Project Manager (recommended 10 years' experience in K-12 Projects) and include percentage of time Project Manager will be on site (if needed).
- c) Construction Site Representative (recommended 5 years' experience in K-12 Projects).
- d) Administrative Staff (if needed).
- e) Any other assigned staff.

5. **Experience and References:**

- a) Profile several educational clients and/or projects specifically related to our owner's representative needs that your firm has performed within the past five years.
- b) Provide a brief overview of other K-12 school districts your firm has worked with that illustrates the depth, experience and service capabilities of your firm with K-12 school clients:
- c) Number of years the firm has provided Owner's Representative Services for school projects.
- d) Provide a minimum of three (3) projects of similar scope and type your firm has completed in the past five years, including:
  - i Project name, location and School District: Name, title, telephone number and email of School District contact,
  - ii Name, address, telephone number and email of project architect, and
  - iii Project description including size in square feet, schedule, and services provided.
- e) Describe the planning processes your firm has developed that illustrates the depth, experience and service capabilities of your firm.
- f) Define your typical insurance coverage for Owner's Representative Services.
- g) List all public sector Owner's Representative Projects that your firm is currently involved with, and the estimated value of each. Include state of completion and contact person.
- h) List a minimum of three (3) construction manager/contractor references with whom your organization has worked with in the past five (5) years. Submit company name, contact person, and phone number.
- i) List a minimum of three (3) architect references with whom your organization has worked with in the past five (5) years. Submit company name, contact person, and phone number.
- j) List a minimum of three (3) K-12 client references with whom your organization has worked with on similar projects in the past five (5) years and include their contact information.



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- k) Supporting Data: Include any other supporting data which you feel will assist the District in evaluation of your firm.
- l) Service Offerings/Approaches:
  - i) Describe the firm's view and approach the role of District Owner's Representative in partnering with the School District, Architect and Construction Manager.
  - ii) Describe the firm's responsibility for participating in the "change order process" during construction.
  - iii) Describe the firm's familiarity and assistance with obtaining or processing grants, rebates, or utility incentives.
  - iv) Discuss the approach to value analysis / controlling cost at various points in the design, bidding, and construction process. Provide an example of proposed cost reduction developed on a recent project during the pre-construction phase.
  - v) Litigation and Ethics Information: List any current or concluded litigation involving your company within the past five (5) years specifically including client involvement. Describe your company's involvement in the matter and the outcome of the matter if concluded.
  - vi) Provide a sample contract.

**Compensation:**

The selection process will follow a qualifications-based selection procedure. The successful candidate should be prepared to discuss proposed fees and compensation with the District immediately after selection.

Invoicing and payment terms should be consistent with the Illinois Prompt Payment Act.

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**Appendix A – Owner's Representative Services**

**General Services**

1. Monthly Project Reporting
  - a. The Owner's Representative will prepare and distribute monthly reports to the Owner on the project budget, the status of the project schedule, and on general project information.
2. Total Project Budget (Proforma) Management
  - a. The Owner's Representative will monitor the CM total project budget, identifying any concerns with budgeted costs and contingencies.
3. Total Project Schedule Management
  - a. The Owner's Representative will monitor and report on schedule progress and notify the Owner of any delays or problems. In the event of schedule risk the OR will collaborate with all entities involved in the project.
4. Project Team Management
  - a. The Owner's Representative will coordinate and expedite the flow of information between the Owner's project team including owner consultants, vendors and contractor(s).
5. Board and Committee Meetings
  - a. The Owner's Representative will attend Board of Education and committee update meetings, as necessary, and assist in providing presentations to the Board of Education, committee members and other stakeholders.
6. Project Delivery Strategy
  - a. The Owner's Representative will evaluate project requirements, identifying any concerns with pre-construction and construction strategies and addressing requirements for function, cost, quality, time and logistics.
7. Record Keeping
  - a. The Owner's Representative shall maintain an organized filing system for all Project documents and records. At Project completion, the Owner's Representative shall certify that all Project documents and records are uploaded into the Owner's electronic project management information system. If it is technically not possible to upload a Project document or record into the Owner's electronic project management information system, the Owner's Representative will deliver the document(s) and record(s) to the Owner at the end of the Term or at any time during the Term at the Owner's request.
8. Meetings
  - a. The Owner's Representative shall schedule, attend, conduct, record, and assist the Owner at all Project meetings (including without limitation meetings with the Architect, CM, and/or Consultants). The Owner's Representative shall direct the Architect or CM to prepare meeting minutes if the Architect or CM is contractually required to do so. In the absence of meeting minutes prepared by others, the Owner's Representative will provide the Owner with minutes from such meetings prepared by the Owner's Representative. The Owner's Representative shall review for accuracy the minutes of such meetings prepared

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by either the Architect, CM, or others. The Owner's Representative shall clarify, amend and report any discrepancies affecting the Project.

9. Owner's Representative shall furnish to the Owner weekly reports containing (a) the status of the Project; (b) a comparison of the Project budget to costs incurred through the date of the report; (c) a comparison of the Project schedule to the work actually completed through the date of the report; (d) any revision to the Project schedule or Project budget made during the week covered by the report; (e) a summary of change orders made during the week covered by the report; (f) a list of all pending change orders and all outstanding issues requiring action or approval by Owner; (g) the status of any governmental requirements and activities required to facilitate approval of the Project; and (h) any other reports concerning the Project as Owner may reasonably request.
10. Owner's Representative shall provide accounting services for the Project, including but not limited to (a) preparing annual budgets; (b) preparing monthly variance reports; (c) monthly Project accounting services related to assembling, reviewing and forwarding to Owner for payment the invoices from the Architect and CM and other consultants; and (d) monitoring the title company's processing of the CM applications for payment. Owner's Representative shall provide such reports in an electronic format in a form acceptable to Owner.
11. Owner's Representative shall be available for questions and follow up by telephone or site meetings with the Owner.
12. The Owner's Representative shall assist in the decommissioning and potential sale of district properties.

### **Pre-Construction Services**

1. Owner's Representative shall review information relevant to the Project, including pre-design studies, preliminary site plans, current building program/utilization, Owner research, Owner generated project concepts, proposed building program, environmental investigation and remediation reports, building systems analysis reports, applicable Village of Deerfield, IL and State of Illinois regulations including building code, health code, and Americans with Disabilities Act compliance.
2. Owner's Representative shall become familiar with, and provide services that are consistent with, all applicable Laws and the requirements of easements, licenses, and other pertinent agreements to the extent the foregoing are made known to Owner's Representative.
3. Owner's Representative shall meet with the Owner and its risk management/insurance consultants and make recommendations regarding the development and implementation of an effective risk management program.
4. Owner's Representative shall assist the Owner with and lead (subject to Owner's input and final approval) the process of identifying, soliciting proposals from, selecting, and negotiating contracts. Owner's Representative shall advise the Owner and make recommendations concerning (a) scope of services to be provided by the Project Team; (b) fees; and (c) administration of contracts with the Project Team at Owner's direction.

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5. Owner's Representative shall provide advice to the Project Team on all matters relating to the planning, design, governmental approvals, construction, and other activities necessary to complete the Project.
6. Owner's Representative shall (1) review the preparation by the Architect of a written and graphic description of the program for the Project, including room uses, sizes and adjacency requirements, in accordance with Owner's goals and objectives (the "Project Program"), (2) prepare and submit to Owner a preliminary estimated schedule for completion of the design and construction of the Project, including, without limitation, the various major activities to be undertaken in connection with the Project and the approximate timing of the commencement and completion of such activities, which Owner's Representative shall monitor and revise from time to time throughout the Term (the "Project Schedule"); (3) assist Owner, CM, and Architect in establishing a Project budget based on a preliminary estimate of Project costs, including without limitation Owner's internal costs, which Owner's Representative shall update from time to time with increased detail as the design of the Project progresses (the "Project Budget"); and (4) monitor the Project Schedule and Project Budget to maximize value, keep the work progressing in a logical manner, and avoid or mitigate interruptions of design and construction.
7. Owner's Representative shall consult with the Owner regarding the Owner's requirements and responsibilities relating to and coordinate all site evaluation activities, including but not limited to, evaluating any further soil reports and studies and determining the need for any site soil corrections; evaluating a site plan(s), survey, topographical survey, schematic designs and elevations for the Project; and determining the need for any additional property rights or other actions related to underground utilities, access, encroachments or other development limitations disclosed in the survey. Owner's Representative shall advise and assist the Owner in all activities necessary to obtain any and all property or rights-of-way necessary for development of the Project or the provision of adequate utility services and access thereto.
8. Owner's Representative shall consult with Owner's engineer and legal counsel regarding any further environmental review of the Project, and advise and assist Owner, Owner's engineer and legal counsel in obtaining all environmental permits or approvals required for the Project, if any.
9. Owner's Representative shall coordinate with Owner in identifying any governmental and quasi-governmental authorities having jurisdiction over the Project, as well as any other organizations that may have an interest in the Project; assist the Architect in obtaining permits for the Project; coordinate with the various municipal and other governmental agencies having permit responsibilities for the Project; represent the Owner at meetings of the applicable governmental units; recommend to the Owner appropriate policies or decisions to be followed on public matters affecting the Project; direct the Architect to ascertain whether there are any significant building code or other governmental compliance issues; coordinate with the Construction Manager the obtaining of necessary building permits or other necessary construction approvals for the Project; and advise the Owner as to any material issues noted by the Architect.

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10. Owner's Representative shall schedule and attend regular meetings with the Architect related to the development of the design.
11. Owner's Representative shall coordinate with the Construction Manager and provide recommendations to the Owner and Architect regarding construction feasibility, value engineering, availability of materials and labor, time requirements for installation and construction, and factors relating to costs, including costs of alternative designs or materials in a manner consistent with the Project Program, Budget and Schedule, and possible cost reductions and economies if and when necessary to reconcile the Project Budget, Program, and Schedule.
12. Owner's Representative shall review and comment on the drawings and specifications for the Project (the "Construction Documents"), as they are prepared by the Architect, and coordinate their review by the Construction Manager. Owner's Representative shall assist the Owner in the evaluation and recommendation of appropriate design alternatives in light of the Owner's Project Program and the Project Budget and Schedule. The Owner's Representative shall not assume any of the Architect's responsibilities for design or any of the Construction Manager's responsibilities for construction means, methods, or costs.
13. Upon approval by Owner of design development plans and specifications, Owner's Representative shall (a) lead the process on behalf of the Owner in reviewing and coordinating the preparation by the Architect and other Project consultants of the Construction Documents for the Project; and (b) make recommendations regarding alternative solutions whenever design details appear to (i) adversely affect construction feasibility, the Project Program, Budget or Schedule; or (ii) cause the Project to deviate from the approved drawings or requirements of Owner.
14. If directed by Owner, Owner's Representative shall direct the Architect, Construction Manager, and Consultant(s) to utilize any project management software designated by Owner, which software may include, but not be limited to, the processing of plan reviews, purchase orders, change orders, invoices, payment applications, requests for information, and document management related to the Project. If the Owner chooses to utilize its project management software for the Project, the Owner will provide and manage a login license for Owner's Representative without charge. Owner will provide initial software training to Owner's Representative without charge. Except for licenses and initial training, the Owner assumes no responsibility for any real or potential costs associated with the use of the project management software by the Owner's Representative.
15. In consultation with the Architect and Construction Manager, Owner's Representative shall provide value engineering services to analyze and make recommendations concerning availability of materials and labor, time requirements for installation and construction, and other factors related to costs, including costs of alternative designs or materials, and possible cost reductions and economies. Owner's Representative shall provide value engineering recommendations to Owner, but the final decision will, in every instance, be Owner's decision.
16. Owner's Representative shall recommend modifications to the Project design, Project Budget, Project Schedule and Project Program to reconcile each with the others, for final decision by the Owner.

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17. Owner's Representative shall assist Owner in setting a final Project Budget, based on the approved design and the Project Schedule, the Project Program, the Project Costs Estimate and financial constraints identified by Owner; if Owner, with the advice of the Owner's Representative, elects to proceed with separate Project construction contracts or separate bid packages, the Project Costs Estimate and final Project Budget shall include a separate budget for each Project construction contract or bid package.
18. Owner's Representative shall act as Owner's representative in coordinating and assisting the Construction Manager in the preparation of bid announcements, which shall consist of, among other things, the working drawings and invitation and instructions to bidders or invitations to bid.

**Design Phase**

1. Design Phase Information
  - a. The OR shall monitor the Design Professional's compliance with the Project Objectives and shall coordinate and expedite the flow of information between the Owner and the Design Professionals.
2. Project Meetings
  - a. The OR shall attend weekly Project meetings attended by the Owner and the Architect.
3. Independent Construction Cost Estimating
  - a. The OR shall review Architect and CM generated estimating including parametric cost modeling and full construction cost estimates at each key stage of design.
4. Review of Design Documents
  - a. The OR shall review the design documents for clarity, consistency, and constructability and for compliance with the project objectives.
5. Owner's Design Reviews
  - a. The OR shall expedite the Owner's design review by compiling and conveying the
6. Approvals by Regulatory Agencies
  - a. The OR shall oversee the transmittal of documents to regulatory agencies for review and shall advise the Owner of potential problems in completion of such reviews.
7. Value Engineering / Cost Analysis
  - a. The OR shall analyze and report to the Owner and advise the Architect of the cost of various design and construction alternatives.
8. Contract Compliance Review
  - a. OR will review all proposed contracts and purchase orders for budget compliance, Owner compliance and issues involving risk of budget or schedule overrun to Owner
9. Logistics Planning
  - a. The OR shall participate in logistics planning for phasing, inventorying existing FFE for reutilization, planning for move(s), disposal of surplus equipment and items; assisting with relocation to new spaces; work with school administration

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on school calendar/schedule and temporary instructional space. The OR shall also assist with the planning and execution of abatement activities.

### **Bidding**

1. Qualifying Contractors
  - a. The OR shall contribute to a list of qualified contractors for each trade package. The OR shall assist the Architect/Construction Manager in receiving and analyzing bids and submittals; interviewing respondent firms and preparing recommendations for the Owner.
2. Notices and Advertisements
  - a. The OR shall assist the CM and Owner in preparing and placing notices and advertisements to solicit bids for the Project.
3. Addenda
  - a. The OR shall receive from the Construction Manager a copy of all addenda. The OR shall review addenda for clarity, consistency, constructability and compliance with the Project Objectives.
4. Bid Opening and Recommendations
  - a. The OR shall attend bid openings and shall assist with the evaluation of the bids for contract document compliance and price. The OR shall assist the Owner and Architect/CM regarding the acceptance or rejection of bids.
5. Contractor's Construction Schedule Review
  - a. The OR shall review the Architect/CM's construction schedule, for compliance with the Project Objectives.
6. Post-Bid Conference
  - a. The OR shall attend post-bid conferences with the CM and successful trade Contractors to review the contract award and administrative procedures.

### **Owner Vendor Procurement**

1. The Owner's Representative will manage the procurement of owner vendors, including independent material testing consultants, moving companies, furniture vendors, equipment vendors, in addition to contractor procurement. The Owner's Representative will develop the RFQ/Ps for issuance, manage all correspondence with prospective vendors, assist in evaluating submittals, maintain documentation records, provide submittal summaries, and support the School District's review and final selection of vendors.
2. Qualifying Vendors
  - a. The OR shall develop and manage requests for proposals and/or qualifications for vendors. This RFQ/P process shall include the following: preparation, advertising and distribution of RFQ/Ps; managing correspondence with potential vendors; receiving and analyzing bids and submittals; interviewing respondent vendors as necessary and preparing recommendations for the Owner.
3. Notices and Advertisements
  - a. The OR shall assist the Architect/CM and Owner in preparing and placing notices and advertisements to solicit bids for the Project.
4. Addenda

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- a. The OR shall receive from the Architect/CM a copy of all addenda. The OR shall review addenda for clarity, consistency, constructability and compliance with the Project Objectives.
- 5. Bid Opening and Recommendations
  - a. The OR shall assist the Architect/CM and Owner in the bid opening and shall evaluate the bids for contract document compliance and price. The OR shall assist the Owner regarding the acceptance or rejection of bids.
- 6. Post-Bid Conference
  - a. The OR shall conduct a post-bid conference with successful vendors to review the contract award and administrative procedures.

**Construction Phase**

- 1. Pre-Construction Conference
  - a. In consultation with the Owner, Architect, and the CM, the OR shall participate in a pre- construction conference with successful trade Contractors during which the CM shall review Project procedures and requirements.
- 2. Permit and Insurance Review
  - a. The OR shall participate in the review of applications, certificates and similar documents provided by the successful trade Contractors as evidence that it has secured the required permits, bonds and insurance. Such action by the OR shall not relieve the trade Contractors of their responsibility to comply with the provisions of the Contract Documents.
- 3. Construction Administration Procedures and Reporting
  - a. The OR shall establish procedures for expediting and monitoring construction phase information.
- 4. On-Site Management
  - a. The OR shall visit the Project Site to provide construction representation as an agent of the Owner.
- 5. Owner, Architect, Contractor Meetings
  - a. The OR shall conduct weekly Project meetings attended by the Owner, Architect, and CM. The Owner's Representative shall direct the Architect or CM to prepare meeting minutes if the Architect or CM is contractually required to do so. In the absence of meeting minutes prepared by others, the Owner's Representative will provide the Owner with minutes from such meetings prepared by the Owner's Representative. The Owner's Representative shall review for accuracy the minutes of such meetings prepared by either the Architect, CM, or others. The Owner's Representative shall clarify, amend and report any discrepancies affecting the Project.
- 6. Progress Payment Review
  - a. The OR shall review the payment applications submitted by the CM and reviewed by the Architect. The OR shall make appropriate adjustments, if required, to each payment application and shall prepare a recommendation to the Owner whether the amount requested accurately reflects the progress of the construction work.
- 7. Review of Requests for Changes to the Work



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- a. The OR shall review the contents of requests for changes to the work submitted by the CM and make recommendations to the Owner with respect to acceptance or rejection of it in accordance with the Contract Documents.
8. Owner's Representative shall represent the Owner in its communications with the Architect, Contractor, and Consultant(s); schedule, attend, and conduct progress meetings, regular on-site meetings to review construction progress and pay requests and to provide appropriate recommendations to the Owner concerning the Owner's decisions on construction matters, including, where necessary, alternative designs or materials; and coordinate, review, advise the Owner concerning, whether to approve change orders, submittals, and respond to requests for information.
9. Owner's Representative shall (i) assist and review the processing of change orders, (ii) advise Owner concerning the necessity for, scope of and recommended cost of change orders, and (iii) negotiate, on Owner's behalf, all change orders with Contractor. Owner to have final authority on the payment of any change order. The final Project Budget and/or Project Schedule, as applicable, will be revised to reflect approved change orders.
10. Owner's Representative shall review applications for payment by the Contractor, review certificates for payment issued by Architect and make written recommendations to Owner concerning payment. Owner's Representative's review and approval shall constitute a representation to the Owner that, to the best of the Owner's Representative's knowledge, information, and belief, the work has progressed to the point indicated and the quality of the work is in accordance with the Contract Documents. In addition, Owner's Representative and Owner shall cooperate with one another to develop an orderly procedure for review and payment of Project costs and expenses, including fees for the Architect and Consultants.
11. Owner's Representative shall direct the CM (and others, where appropriate) to prepare and update a critical path schedule for completion of the applicable work. In the event of delays impacting the critical path schedule, Owner's Representative shall make recommendations to Owner for corrective action by CM.
12. Owner's Representative shall coordinate negotiations among the Project Team, and, as applicable, the utility companies, local municipalities, and others concerning the installation of electric, sewer, water, gas, and telephone (but not internal telephone, security or data wiring or connections) facilities required for the Project, on a schedule consistent with the Project Schedule.
13. Owner's Representative shall monitor and report to Owner the Architect's review and approval of shop drawings, product data and other submittals by Contractor.
14. Owner's Representative may require the CM to maintain a daily log containing the number of workers, equipment, work accomplished, problems encountered and other relevant data as the Owner may require. Although Owner's Representative shall not guarantee the performance by the CM, Owner's Representative shall recommend courses of action to the Owner when Owner or Owner's Representative becomes aware that requirements of any Project construction contract are not being fulfilled, or when the CM falls behind in its schedule; shall communicate recommendations, as directed by the Owner, to the CM on behalf of the Owner; shall monitor the CM's

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performance of such recommendations; and shall report the CM's progress to the Owner on at least a monthly basis.

15. Owner's Representative shall notify Owner if Owner's Representative becomes aware that the work of CM is not being performed in accordance with the requirements of the Contract Documents. As appropriate, Owner's Representative shall have authority, with written authorization from the Owner, to require additional inspection or testing of the work in accordance with the provisions of the Contract Documents, whether or not such work is covered, installed or completed. Owner's Representative shall review any and all test reports and notify the Owner, the Architect and the CM, as appropriate, of deficiencies in the work of which Owner's Representative becomes aware and shall advise the Owner of projected consequences of such default and shall make recommendations to Owner with respect thereto. With the written authorization of the Owner, the Owner's Representative shall reject work which does not conform to the requirements of the applicable Contract Documents.
16. Owner's Representative shall attend on-site review of the Project to confirm substantial and final completion of the construction of the Project, and notify Owner when Owner's Representative believes the work under a Project construction contract is substantially complete and that a punch list should be prepared.
17. Owner's Representative shall coordinate with the Architect in its review of the work to enable the Architect to determine the date of substantial completion. At the substantial completion by CM of the work, monitor the Architect in its inspection of the work and preparation of a detailed "punch list" specifying any items which require completion, installation, correction or repair. Owner's Representative will consult with Owner and/or Architect in connection with recommendations for the rejection and replacement of all nonconforming work, as appropriate.
18. Owner's Representative shall obtain from CM record drawings or, if required by the applicable Project construction contract, "as-built" drawings, as construction progresses.
19. Together with the CM, Architect and Owner, the Owner's Representative shall monitor and observe the testing and start-up of all utilities, systems and equipment for the Project.
20. Owner's Representative shall assist in the final close-out of the Project by (i) obtaining, or causing the CM to obtain, all government approvals required for the legal use and occupancy of the Project, (ii) obtaining all warranties, guarantees, bonds, insurance certificates, installation manuals, and other items required pursuant to the Project construction contracts, (iii) confirming that all affidavits, waivers, and releases the CM are required to provide pursuant to the Project construction contracts to achieve final completion of the Project, (iv) analyzing all claims (including change order disputes and other claims for extra compensation) asserted by the CM and the Architect, (v) collecting any and all back charge claims that Owner may assert against any Architect or CM, including assistance with any legal proceedings instituted by Owner and/or any Architect or CM, and/or (vi) representing Owner at meetings and/or inspections scheduled by Owner and held to resolve problems relating to design, physical condition or operation of the Project to seek enforcement of warranties.

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21. Owner's Representative shall coordinate the purchase and installation of Owner-Furnished-Owner-Installed and Owner-Furnished-Contractor-Installed furniture, fixtures and equipment.
22. Owner's Representative shall assist the Owner with the selection of the mover and coordinate all occupant relocations into the Project space.
23. Owner's Representative shall assist the Owner with the selection of the Commissioning agent and coordinate and administer the Project Commissioning process.
24. SECURITY/SAFETY. While performing the Work, the Owner's Representative shall promptly inform the Owner if the Owner's Representative becomes aware of any security concerns and/or unsafe conditions.

**Close-out Phase**

1. Substantial Completion
  - a. The OR will monitor the issuance of the Certificate of Substantial Completion, including punch list and incomplete work. The OR will monitor the completion of all listed incomplete work by the CM.
2. Final Completion
  - a. The OR will monitor and review the issuance of the Certificate of Final Completion and shall provide to the Owner a written recommendation regarding payment to the CM.
3. Occupancy Permit
  - a. The OR shall assist the CM, Architect, & Owner in obtaining an Occupancy Permit by accompanying governmental officials during inspections of the Project.
4. Record Documents
  - a. The OR shall collect any Record Documents required by the construction contract from the CM and Architect and shall transmit those records to the Owner.
5. Operation and Maintenance Materials
  - a. The OR shall collect Operation and Maintenance Materials required by the construction contract from the CM and shall transmit these materials to the Owner.
6. Close-Out Reports
  - a. At the time of conclusion of the Project, the OR shall prepare final Project accounting and close-out reports.