



# **Port Washington-Saukville School District**

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***Port Washington-Saukville School District***

**Request for Proposal (“RFP”)  
Construction Management Services  
(2025 Capital Referendum)**

**for**

**Port Washington-Saukville School District**

**March 14, 2025**

PRE-PROPOSAL MEETING: **Tuesday, March 18, 2025 at 11:00 AM (CST)**  
**[Virtual Meeting held via Teams](#)**  
**ID:281640143077**  
**Passcode: GR7cD6jK**

RFP PROPOSALS DUE: **March 27, 2025 by 2:00 pm (CST)**

RFP SUBMISSION FORMAT: Proposals shall be submitted electronically in PDF format to the “RFP Submission Contact” listed below. E-MAIL a copy of your entire proposal or link to your proposal in a single Adobe Portable Document (.pdf) format. Acknowledgement of receipt will be provided via an email response from the contact below once received.

RFP SUBMISSION CONTACT: Mel Nettesheim  
Director of Business, Finance, & HR  
Phone: 262-268-6081  
Email: [mel.nettesheim@pwssd.k12.wi.us](mailto:mel.nettesheim@pwssd.k12.wi.us)

RFP QUESTIONS CONTACT: Nick Anderson  
Project Executive  
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## TABLE OF CONTENTS

<b>1.0</b>	<b>PROJECT INFORMATION .....</b>	<b>4</b>
1.1	Background .....	4
1.2	Project Description .....	4
1.3	Baseline Project Detail.....	5
1.4	District-Provided Information .....	5
1.5	Contract Sum .....	6
1.6	Project Milestone Schedule Dates .....	6
1.7	Form of Contract between the District and the Selected Respondent .....	6
1.8	Self-Performed Work.....	6
<b>2.0</b>	<b>PROPOSAL REQUIREMENTS AND EVALUATION CRITERIA .....</b>	<b>7</b>
2.1	Tentative Schedule of Selection Process .....	7
2.2	Pre-Proposal Meeting.....	7
2.3	Evaluation Criteria.....	7
2.4	Respondent's Team Qualification .....	8
2.5	Work Plan .....	8
2.6	Project Cost .....	8
2.7	Safety .....	8
2.8	Interviews.....	8

**All checked Attachments listed below are part of the RFP.**

<u>X</u>	Attachment A:	Respondent's Team Qualifications
<u>X</u>	Attachment B:	Project Schedule and Work Plan
<u>X</u>	Attachment C:	Project Cost

Throughout this RFP “Respondent” or “you” means the prime firm responding to this RFP.

## **1.0 PROJECT INFORMATION**

### **1.1 Background**

The Port Washington-Saukville School District (PWSSD) has a total student enrollment of approximately 2,478 students in (5) educational facilities: Saukville Elementary, Dunwiddie Elementary, Lincoln Elementary, Thomas Jefferson Middle School, and Port Washington High School.

A district wide facility assessment was completed by Bray Architects in February 2021. The information produced in the facility assessment was referenced while developing a plan for the April 2025 capital referendum in the amount of \$59,400,000. The capital referendum will be voted on April 1, 2025.

PWSSD is in the process of seeking a design partner to execute the complete design process in order to competitively bid and construct the referendum projects. The primary focus of the design and construction will include a new elementary school to replace the existing Saukville Elementary facility, maintenance needs at Dunwiddie Elementary, Lincoln Elementary and the Port Washington High School. As part of the referendum projects there will be roofing replacement completed at Thomas Jefferson Middle School, Port Washington HS, Dunwiddie Elementary, and Lincoln Elementary. The design for the roofing replacement will be held by a separate designer outside of this RFP, the roofing replacement project cost is estimated at \$5.1 million.

- Saukville Elementary School serves 4K – 4<sup>th</sup> grade students, current enrollment is approximately 335 students. It is located at 333 North Mill Street, Saukville. The existing facility will be demolished once a new building has been completed at a different location.
- Dunwiddie Elementary School serves 4K – 4<sup>th</sup> grade students, current enrollment is approximately 350 students. It is located at 1243 West Lincoln Ave, Port Washington and is approximately 58,300 sq ft.
- Lincoln Elementary School serves 4K – 4<sup>th</sup> grade students, current enrollment is approximately 305 students. It is located at 1325 Theis Lane, Port Washington and is approximately 57,930 sq ft.
- Thomas Jefferson Middle School serves 5<sup>th</sup> grade – 8<sup>th</sup> grade students, current enrollment is approximately 715 students. It is located at 1403 North Holden Street, Port Washington.
- Port Washington High School serves 9<sup>th</sup> grade – 12<sup>th</sup> grade students, current enrollment is approximately 815 students. It is located at 427 West Jackson Street, Port Washington and is approximately 298,550 sq ft.

### **1.2 Project Description**

Below is a description of the work planned as part of the referendum.

1. Saukville Elementary School (Approx \$45.8M)
  - a. Develop new site for elementary campus (location TBD).
  - b. Project budget includes a value for purchasing land, estimated land value of \$1.2 million.
  - c. New building to be a four (4) section elementary campus with an anticipated enrollment of 332, and a maximum student enrollment of 456.
  - d. Classroom spaces to be modern and flexible, allowing for open concept with the ability to

- section off smaller teaching spaces.
  - e. New building shall include a commercial kitchen, architectural fees shall include a food service consultant.
  - f. Upon completion and occupancy of the new school the existing building shall be demolished and land restored.
- 2. Dunwiddie Elementary School (Approx \$3M)
  - a. ADA Accessibility modifications and improvements.
  - b. Exterior door/frame replacement with hardware and security access updates.
  - c. Exterior window replacement.
  - d. HVAC Updates throughout the building.
  - e. Civil and play-space improvements on campus.
  - f. Addition of emergency generators and associated electrical gear and circuiting.
- 3. Lincoln Elementary (Approx \$2.4M)
  - a. ADA Accessibility modifications and improvements.
  - b. Exterior door/frame replacement with hardware updates and security access.
  - c. Exterior window replacement.
  - d. HVAC Updates throughout the building.
  - e. Civil and play-space improvements on campus.
  - f. Addition of emergency generators and associated electrical gear and circuiting.
- 4. Port Washington High School (Approx \$3.1M)
  - a. ADA Accessibility modifications and improvements.
  - b. Exterior door/frame replacement with hardware and security access updates.
  - c. Exterior window replacement.
  - d. HVAC Updates throughout the building.

District projects include roof replacements. In areas where limited coordination with other construction activities is required, the Owner intends on contracting directly with a roofing consultant to manage this work. The estimated value of the reroofing work has been removed from the per building budgets stated above.

### 1.3 Baseline Project Detail

In order for Respondents to accurately project general conditions and related cost for the project, this RFP includes a potential scenario project that shall be used for the creation of General Conditions cost proposal. The sole purpose of this detailed project described in the RFP is to establish a project that will be used as a basis for adjustment once the project design is completed.

### 1.4 District-Provided Information

The District has assembled the following information about the Project (collectively, the “RFP Documents”) for review by the Respondent:

- This RFP with all the attachments (including hyperlink attachments)

#### PROJECT INFORMATION LINKS

- [Exhibit A – Dunwiddie Facility Assessment Information](#)
- [Exhibit B – Lincoln Facility Assessment Information](#)

- [Exhibit C – Port Washington HS Facility Assessment Information](#)
- [Exhibit D – REF Design and Construction Schedule](#)
- [Exhibit E – REF Capital Improvement List](#)
- [Exhibit F – PWSSD Construction Contract](#)

#### RFP RESPONSE TEMPLATE LINKS

- [Attachment A-2,3,4 Template](#)
- [Fee and General Conditions Worksheet](#)

The District will provide notice of any changes to the RFP via addenda. Any information provided to Respondents during the RFP process, including the documents enumerated in this Section, is provided only for your use in preparing your Proposal. This RFP creates the baseline for adjustment. Any substantial modifications to scope and schedule will be adjusted from this baseline RFP, if necessary.

### **1.5 Contract Sum**

The selected Respondent will perform the Work for a Contract Sum that will include the Cost of the Work and the Respondent's Fee (as those terms are defined in the Contract).

### **1.6 Project Milestone Schedule Dates**

All fees, rates, cost, etc shall be based on the construction schedule dates for each respective scenario. See the Project Schedule link in Section 1.4.

### **1.7 Form of Contract between the District and the Selected Respondent**

- 1.7.1 The Contract between the selected Respondent and the District will be the customized AIA A133 – 2019 Construction Manager at Risk (the "Contract"). Respondents shall review this District contract prior to responding to this RFP. Refer to Section 1.4 for a link to this contract. Any terms of this contract that are not acceptable shall be indicated in the RFP response as part of the Attachment B response. Other modifications to this contract after a CM award has been made will not be allowed unless mutually agreed to by the Owner and the Respondent.
- 1.7.2 The Contract will incorporate by reference this RFP and any RFP Attachments, the General Conditions of the Contract for Construction, American Institute of Architects, Inc. ("AIA") Document AIA A201-2017, and any RFP modifications agreed to by the District. The District may attach to the Contract as Supplementary Conditions Respondent's Proposal, selected provisions of Respondent's Proposal or modifications to Respondent's Proposal agreed to by District and Respondent.

### **1.8 Self-Performed Work**

- 1.8.1 Those portions of the work (as ultimately described in the Construction Documents) that the selected Respondent requests to self-perform shall be managed as follows:

The Respondent shall competitively bid or request proposals from appropriate subcontractors, suppliers, and fabricators. The Respondent will be required to obtain at least two additional competitive bids for all portions of the work that the Respondent desires to self-perform, and shall have these bids sent directly to the District along with the Respondents self-performed work proposal or bid prior to the bid due date. The District shall then determine, after scope review meetings and evaluation from the Respondent, which of such proposals or bids will be accepted for the Project.

- 1.8.2 The District, in its sole discretion, may allow the selected Respondent, as the Contractor, to self-perform work without obtaining competitive subcontract bids, if (1) the Contractor specifically identifies the Work the Contractor proposes to perform with its own forces in its Proposal, (2) the Contractor discloses its hourly wage rates in the RFP response, (3) the Contractor includes the cost of the Work it proposes to perform with its own forces as a separate line item in the GMP (resulting in a cost-plus with a not-to-exceed price for the specific line item), and (4) the Contractor competitively bids materials and supplies.

## 2.0 PROPOSAL REQUIREMENTS AND EVALUATION CRITERIA

### 2.1 Tentative Schedule of Selection Process

The District's intended schedule for selection of the awarded Respondent is set forth below.

Activity	Date
RFP Available for Distribution	March 14, 2025
Pre-Proposal Meeting (Virtual)	March 18, 2025 @ 11:00 AM
Deadline for RFP Questions	March 26, 2025
CM Proposal Due Date	March 31, 2025 by 2 PM
Shortlist for interviews finalized	April 2, 2025
Deadline to Provide Project Team Change*	April 3, 2025 at 2:00 PM
Interviews	April 7, 2025 starting at 8:00 AM
Formal Approval Recommendation to Board	April 14, 2025 (Finance Meeting) April 28, 2025 (Board Meeting)

*\*PWSSD understands that the April 1, 2025 Spring Election may introduce staffing and team variables to firms responding to this RFP. It is acceptable for firms to provide an addendum to their proposal changing proposed team members provided such modification is received no later than the date indicated above. Fee or other modifications to the proposal will not be allowed.*

### 2.2 Pre-Proposal Meeting

A virtual Pre-Proposal Meeting will be held on March 18, 2025 via Teams. A link to join the meeting is provided at the beginning of this RFP, page 2. Attendance at the Pre-Proposal meeting is voluntary.

### 2.3 Evaluation Criteria

- 2.3.1 The District will evaluate Proposals using the following evaluation criteria:

Attachment / Section	Description	Value
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<u>Attachment A</u>	Respondent's Firm and Team Qualifications	20
<u>Attachment B</u>	Work Plan and Schedule	20
<u>Attachment C</u>	Project Cost	20
Section 2.7	Safety	5
Section 2.8	Interview	20

2.3.2 In order to be considered responsive, each Respondent must complete and submit all required Attachments to the RFP Documents.

2.3.3 The District will evaluate and score each Proposal. The Respondent selected for an award will be the one whose Proposal is responsive, responsible, and is the most advantageous to the District, as determined by the District in its sole discretion.

2.3.4 Submission of a Proposal indicates the Respondent's acceptance of the evaluation criteria.

## **2.4 Respondent's Team Qualification**

The Respondent will prepare and submit information pertaining to their Team's Qualification which will identify the experience of the Respondent and its Team Members. A lack of prior experience and/or working together on comparable projects may hinder your overall score. Failure to complete may result in disqualification.

## **2.5 Work Plan**

The Respondent will prepare and submit information regarding their approach / plan to working on the Project. Failure to complete may result in disqualification.

## **2.6 Project Cost**

The Respondent will prepare and submit information regarding their proposed Project cost. Failure to complete may result in disqualification.

## **2.7 Safety**

The Respondent shall include the following information regarding their firm's safety.

1. Worker's Compensation Experience Modification Rate (EMR) for the last three years.
2. Number of work hours logged in the previous calendar year.
3. Number of OSHA recordable incidents in the previous calendar year.
4. Number of recordable injuries and illnesses with days away from work in the previous calendar year.

## **2.8 Interviews**

If necessary, the District may shortlist and interview the top-rated Respondents.

The District may request that the Respondent's team members attend the interview on the date specified in this RFP. The District may request additional information prior to interviews.





## **ATTACHMENT A: RESPONDENT'S FIRM AND TEAM QUALIFICATIONS**

1. Provide the Firm profile information as indicated in attachment A-1.
2. Complete the following Critical Team Member Experience Matrix (Attachment A-2) identifying the experience and responsibilities of the identified team members. Note the following when documenting this information:
  - a. Submit information for the Project Roles specified in the Matrix.
  - b. List only ONE individual per role. Include additional names using attachment A-3.
  - c. The comparable project(s) must have been commenced/completed within the last FIVE years and should be similar to the District's Project.
  - d. Attach a 1-page resume for EACH individual listed in the Matrix.
3. Complete the following Additional Team Member Matrix (Attachment A-3) identifying the other key Team Members / Subcontractors that will contribute to the success of the Project. Note the following when documenting this information:
  - a. Attach a 1-page resume for EACH individual listed in the Matrix.
4. Complete and submit the following Project Data Sheet(s) (Attachment A-4) identifying the specific project experience of the Respondent and their Critical Team Members. Note the following when documenting this information:
  - a. A separate Project Data Sheet must be prepared for EACH project with only one project allowed per sheet.
  - b. Submit up to, and no more than, THREE total projects.
  - c. Listed project(s) must have been commenced/completed within the last FIVE years and should be similar to the District's Project.
  - d. Listed project(s) must have been managed by the Respondent or any other firm's on the Respondent's team.
  - e. It is recommended that you list projects completed by the Team Members identified in Attachment A-2.
  - f. Attach any photos or additional information (no more than two pages worth) with each Project Data Sheet.

## **ATTACHMENT A-1: RESPONDENT'S FIRM PROFILE**

The Respondent shall include the following items related to the firm.

### **Firm Information**

- Firm Name, Address of main office and any branch offices. Indicate which office would be managing this project.
- Name and title of contact person
- Names of officers in firm and an organizational chart
- Bonding capacity
- Number of years the firm has provided construction management services
- Volume of related K-12 educational completed work in the previous three years
- Overall volume of completed work in the previous three years
- Union affiliations
- Self-perform work capabilities

## ATTACHMENT A-2: CRITICAL TEAM MEMBER EXPERIENCE

Project Role	Pre-Construction Manager or Senior PM	Construction Project Manager (Primary/Lead)
Name of Individual		
E-mail Address		
Individual's Firm Name		
Individual's Firm Location	City, State	City, State
Current job function within Firm		
Years working within Firm	#	#
Years working within Industry	#	#
Number of projects completed with other Team Members	1. Construction PM: # 2. Site Superintendent: # 3. Cost Estimator: #	1. Pre-Construction PM: # 2. Site Superintendent: # 3. Cost Estimator: #
Identify the name, cost, and completion date for up to three <u>comparable</u> projects that the Team member has worked on	1a. Project Name 1b. Project Cost 1c. Completion Date  2a. Project Name 2b. Project Cost 2c. Completion Date  3a. Project Name 3b. Project Cost 3c. Completion Date	1a. Project Name 1b. Project Cost 1c. Completion Date  2a. Project Name 2b. Project Cost 2c. Completion Date  3a. Project Name 3b. Project Cost 3c. Completion Date
<u>Briefly</u> describe the Individual's Responsibilities for this Project		
Percent of Team Members Time projected on this Project	Pre-Construction: #% Construction: #%	Pre-Construction: #% Construction: #%

### ATTACHMENT A-3: CRITICAL TEAM MEMBER EXPERIENCE

Project Role	Site Superintendent (Primary/Lead)	Cost Estimator
Name of Individual		
E-mail Address		
Individual's Firm Name		
Individual's Firm Location	City, State	City, State
Current job function within Firm		
Years working within Firm	#	#
Years working within Industry	#	#
Number of projects completed with other Team Members	1. Pre-Construction PM: # 2. Construction PM: # 3. Cost Estimator: #	1. Pre-Construction PM: # 2. Construction PM: # 3. Site Superintendent: #
Identify the name, cost, and completion date for up to three <u>comparable</u> projects that the Team member has worked on	1a. Project Name 1b. Project Cost 1c. Completion Date  2a. Project Name 2b. Project Cost 2c. Completion Date  3a. Project Name 3b. Project Cost 3c. Completion Date	1a. Project Name 1b. Project Cost 1c. Completion Date  2a. Project Name 2b. Project Cost 2c. Completion Date  3a. Project Name 3b. Project Cost 3c. Completion Date
<u>Briefly</u> describe the Individual's Responsibilities for this Project		
Percent of Team Members Time projected on this Project	Pre-Construction: #% Construction: #%	Pre-Construction: #% Construction: #%

ATTACHMENT A-3: ADDITIONAL TEAM MEMBER

Project Role / Subcontractor	Individual Name	Firm Name	Firm Location (City, State)

### ATTACHMENT A-4: PROJECT DATA SHEET

Construction Firm Name		Project Owner	
Project Name		Project Owner Contact	
Project Location	City, State	Project Owner Contact E-mail	
Construction Cost		Project Architect Firm Name	
Construction Commencement Date		Project Architect Contact	
Construction Completion Date		Project Architect Contact E-mail	
Project Size (square feet, etc.)		Proposed Team Members from Attachment A-2 / A-3 that worked on this project	
Type of Services Provided (Pre-Construction, Construction, etc.)			
Construction Delivery Method (CMAR, Design-Build, etc.)			
Briefly describe how this project is similar to the District's Project. Identify any challenges you encountered on the project and briefly describe how these issues were resolved			

## **ATTACHMENT B: WORK PLAN AND SCHEDULE**

1. Provide an average number of respondents you have historically received per bid scope on similar sized school projects.
2. How does your firm ensure that critical milestone dates and the final completion date are met? What adjustments are typically made when it appears that critical milestones are in jeopardy of being met?
3. What bidding platform/software and construction management software does your firm utilize for facilitating the bidding and construction management processes?
4. Review the contract template included in Section 1.4. Indicate any sections or language that your firm takes exception to and requires additional negotiation, if any.

## ATTACHMENT C: PROJECT COST

All Project cost information in this Attachment should be completed assuming a Cost of the Work equal to the District's budget, and achieve the Substantial Completion Date (or any other critical dates) stated in the Project Schedule.

Attach with your Proposal the completed PDF AND Excel "Attachment C-1,2,3,4 Project Cost and GCs".

- A. Complete the tab labeled "1.Proposed Fee" – Includes proposed CM Fee, Insurance, Performance Bond and Supervisory & Support General Conditions Summary
  - a. The purpose of this workbook table is to establish the Lump Sum amounts and percentages of the estimated Cost of the Work, which are to be incorporated in the Contract based on the scope outlined in this RFP. The selected Respondent will be bound to these values based on the scope outlined. The actual Guaranteed Maximum Price will be established pursuant to Section 2.2 of the Contract. The percentages will be converted to fixed amounts in the final Guaranteed Maximum Price.
  - b. Article 6.1 includes in its definition of Cost of the Work items that will not be incorporated in the Project, which items are commonly referred to as "overhead," "general conditions," or "general requirements." The Contract requires the Respondent to include such items in the Guaranteed Maximum Price proposal and the Schedule of Values as "General Conditions." The District will only pay for General Requirements items identified in Section 6.1 of the Contract or in the final Guaranteed Maximum Price proposal accepted by the Owner and incorporated in the Contract by execution of the Guaranteed Maximum Price Amendment pursuant to Article 2.2.9 of the Contract.
- B. Complete the tab labeled "2. General Conditions" Matrix
  - a. The purpose of this table is to evaluate Respondents on the adequacy of their proposed staffing and to establish a not-to-exceed cost for Supervisory and Support General Conditions based on the project scope outlined. General conditions may be adjusted up or down based on the final project scope when the GMP is established, however any adjustment shall use the RFP response as a baseline for adjustment.
  - b. All items categorized as "Supervisory and Support General Conditions" on the "2. General Conditions" tab must be included with this attachment, if reimbursement as Cost of Work is being requested as part of Supervisory and Support General Conditions.
  - c. Respondent's or Respondent's affiliate company owned equipment used as part of the General Conditions or for negotiated self-perform work may be rented or leased to the Project as a cost only if it has a fair market value of the piece of equipment is of \$5,000 or greater. Any equipment leased to the Project shall be leased at 70% of the AED Green Book monthly rates prorated daily. Any equipment that is less than this threshold shall be included in the Respondents overhead, fee rates and/or labor rates.
- C. Complete the tab labeled "3. GC List".
  - a. The purpose of this table is to ensure all Respondents are including the same scope with their general conditions in order to compare Respondents accurately. This table will become a part of the contract.
  - b. Any item included under the "Supervisory and Support General Conditions" may not be passed on through a subcontractor unless specifically noted in tab "2. General Conditions" or a credit is provided
- D. Complete the tab labeled "4. Labor Rates"



- a. The purpose of this table is to establish a schedule of hourly rates that the Respondent will charge as a part of their Contract Sum for supervisory & support personnel and trade labor.
- b. Complete a schedule of hourly rates that the Respondent will charge as a part of their Contract Sum for supervisory and support personnel under Article 7 of the Contract, identifying each person by name, title or job classification. Rates must be included for all years indicated.
- c. It is the District's intent to have any trade work that is able to be self-performed by the Respondent to be competitively bid. All rates and fees shall be based on the Respondent not self-performing work other than providing general condition services. There may be portions of work for various reasons that the District may determine to not competitively bid and negotiate the work based on the Respondent's labor rates and self-performed work fees.