

North Shore School District 112

Date: February 20, 2018

To: Dr. Jane Westerhold and Ed Rafferty, Superintendent of Schools
Members of the Board of Education

From: Christopher Wildman, CPA, Chief Financial Officer and Treasurer

Subject: Recommendation New Architecture Firm – Wight & Company

Strategic Plan Alignment: Parameter or Objective: We practice fiscal responsibility while maintaining an operating fund balance of at least 25%.

Disposition: Action

Executive Summary:

North Shore School District 112 solicited a Request for Qualifications (RFQ) for architectural services in the Daily Herald on December 22, 2017. On January 2, 2018, the RFQ specification was released, and on January 5 there was a Non-Mandatory Pre-Submittal meeting to provide background on the District's initiatives. No addendum was issued. The RFQ submittals were due and opened on January 16, 2018.

The RFQ process is governed by the Local Government Professional Services Selection Act, 50 ILCS 510/0.01 et seq. The district used three District administrators for the First Round selection team and interviews. Out of eighteen firms that submitted their qualifications, seventeen were interviewed in the First Round on January 23-24, 2018, and the selection team produced a shortlist of six firms. The district then utilized two Board members, two Community members, and five District administrators for the selection and interview the shortlisted firms, on February 7-8, 2018. The shortlist was reduced to the top three and negotiations started with the 1st ranked firm, Wight & Company.

The district entered into negotiations with Wight & Company and has come to terms with fee structure and scope outlined in the Board Strategic Vision timeline. The total fee for the Facility Assessment (\$132,600) for the nine schools and a partial Facility Assessment for the three schools that are closing (\$36,400) and Development of a Long-Range Facilities Plan (\$100,000) is \$269,000. Attached is the Proposal for Facility Assessment and Long-Range Facility Planning.

All further scope beyond this, it is understood that Wight & Company and District 112 will commence development of a Master District Architect Agreement using a typical American Institute of Architects (AIA) Agreement. This Agreement shall include a master fee schedule outlining compensation for future projects based on project type and construction costs.

Members of the Board of Education/Dr. Jane Westerhold
And Mr. Ed Rafferty, Superintendents of Schools
Recommendation New Architecture Firm – Wight & Company
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Recommendation: Approval

Suggested Motion: May I have a motion to move that the Board approve Wight & Company as District 112's New Architectural Firm, as presented by Administration.



Wight & Company

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2500 North Frontage Road

Darien, IL 60561

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P 630.969.7000

F 630.969.7979

February 15, 2018

Mr. Christopher Wildman
Chief Financial Officer/Treasurer/CSBO
North Shore School District 112
1936 Green Bay Road
Highland Park, IL 60035

PROPOSAL FOR FACILITY ASSESSMENT AND LONG-RANGE FACILITY PLANNING SERVICES

Dear Mr. Wildman:

Thank you for the selection of Wight & Company (Wight) to assist North Shore School District 112 (District) with facility assessment and long-range facility planning needs. We have enjoyed getting to know the District, researching and understanding the Board of Education’s Strategic Vision, and we are thrilled to have the opportunity to work with your team. We are pleased to submit this fee proposal which is presented in five parts:

- **UNDERSTANDING**
- **SCOPE OF SERVICES**
- **SCHEDULE**
- **COMPENSATION**
- **FOLLOW UP STEPS**

UNDERSTANDING

Based on the review of the Board’s Strategic Vision and our two interview presentations during the selection process, we understand the three primary immediate needs of the District are:

- 1) **Conduct a Facility Assessment of the District’s school facilities.** With the planned closure of Lincoln Elementary School and Elm Place Middle School beginning with the 2018-2019 school year, and the future relocation of the Green Bay Early Childhood Center / District Administration Offices, we understand our study efforts will be focused on the following nine school facilities:
 - Indian Trail Elem. School, Oak Terrace Elem. School, Red Oak Elem. School, Sherwood Elem. School, Wayne Thomas Elem. School
 - Braeside Elem. School, Ravinia Elem. School (noted separately for age/historic significance)
 - Edgewood Middle School and Northwood Junior High School
 In addition, we understand that a partial facility assessment looking at the physical conditions only for Lincoln Elem. School, Elm Place Middle School and Green Bay Early Childhood Center/ Administrative Offices are desired.
- 2) **Work with a Facility Planning Committee to develop a Long-Range Facility Plan.** This will likely include working in a leadership capacity with a District-based planning committee to develop a facility improvement plan for each of the nine schools noted above (not including Lincoln, Elm Place and Green Bay). We understand that this committee may also include representatives from the community.
- 3) **Assist with planning of future student/program relocations.** At this time, we anticipate that this will be focused on exploring options and developing a solution for the Early Childhood Program to be re-located from the Green Bay School facility.

SCOPE OF SERVICES

Step 1 - Facility Assessment

Based upon the approach presented in our interview presentation on February 8, 2018 we propose to structure the Facility Assessment process around two core areas – a physical condition assessment and an educational alignment study. This approach is intended to assist the District in determining the state of the existing building conditions and to provide measurement of how well the environments support learning practices currently in place (and anticipated for the future). While the specific items to be studied will be determined in consultation with the District, each area of study is outlined as follows:

Physical Condition Assessment

The focus of this study area will be on the three primary physical condition components of the school buildings – building assembly, building infrastructure and exterior/site. Our approach to this study area will be completed with a team of technically-focused architects, engineers and two outside specialty consultants. The process will include an initial kick-off meeting(s), research with building maintenance staff, visual investigations of each location and follow up review with District Administration and building maintenance staff. This study area will be supplemented with information the District has on file and current knowledge of the buildings. Findings will be categorized using a rating system refined with the District for each building component's condition. The rating system will reflect the level of priority, condition and life expectancy. To assist with prioritizing by the District, observations may also be categorized into various criteria which may include: Building Enclosure, Safety & Security, Energy & Operational Efficiency, Interior Finish Conditions, and Site. The Physical Condition Assessment will not take the place of, or fulfill the requirements of, a 10-year health-life safety survey.

Incorporated into this scope of work will be the work of two outside specialty consultants to review Site/Civil and Building Enclosure elements:

Site / Civil – Eriksson Engineering Associated, Ltd. of Grayslake, IL

The scope of the site/civil assessment will be based on visual assessments and will include:

- Visiting each site to evaluate the physical condition of all pavement surfaces...including curbs, walks, parking lots, playground surfaces
- Evaluation of the condition of site structures, including but not limited to manholes, catch basins, valve vaults, flared end sections and retaining walls
- Evaluation of existing drainage conditions and any associated stormwater facilities
- Review and analysis of historical record documentation, including drawings and permits, as it pertains to any existing stormwater detention provided for each site
- Development of a written summary of findings, including a scoring mechanism that estimates the replacement timeline for each of the paving surface
- Attending one meeting with Wight and the District to review findings

Building Enclosure – Inspec, Inc. of Chicago, IL

The scope of the exterior wall, window and door surveys will be based on visual assessments and will include:

- Coordination with Wight and the District to discuss the strategy of the exterior wall, window and door survey at each of the twelve district schools

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- Photographs of all elevations of the buildings stitching the imaged sections into contiguous photo-elevation plans
- Measurement of all wall panels and include the dimensions for all fenestrations including window/door sections and transcribe the dimensional data onto photo-elevation plans
- Observations to determine the general appearance of the wall systems including defect items specific to walls using defined defect codes
- Observations to determine the general appearance of the window and door systems including defect items specific to Windows and Doors using defined defect codes
- Locating observed wall, window and door defect items on elevation plans and coded to correspond to an attached table
- Transcribing all observed defect items into a table by elevation and defect description with estimated unit cost for the recommended repairs and prioritized by severity if requested
- An Executive Summary will provide an opinion of probable cost for all repairs and by school building

The exterior wall, window and door data will address the general condition of the walls and masonry and will present recommendations for any additional services that may be required which may include physical testing, water testing or the disassembly of wall elements, window, curtain wall or door assemblies or components. The survey is limited to the exterior masonry unless requested otherwise.

The scope of the roof survey will be based on visual assessments and will include:

- Development of a Roof Plan showing significant details and delineating roof areas with square footages, to be used in the survey
- Gathering relevant warranty and recent repair information from District records
- Observations to determine the roof's general appearance, surface conditions, and membrane characteristics and conditions
- Observations and notations of edge conditions of the roof, including base flashings, counter-flashing, coping, perimeter walls, and fascia
- Observations around equipment to including flashing, caulking, traffic patterns, drainage and contaminates
- Observations and notations of condition of pitch pans/pockets, vents, drains, and other roof penetrations
- Observation of building exterior/adjoining wall materials and penetrations, associated with the roof system, such as scuppers and overflow outlets
- Observations of expansion joints and control joints
- Observations of the general drainage characteristics of the roofs
- From the initial Roof Plan, a Roof Defect Plan will be developed which will include coding and photos corresponding to the observed defects and noting recommended repairs.

The roof data gathered as the result of the roof survey, including condition photos, shall be provided in an electronic format. This information can be made available and hosted on Inspec's on-line Roof Management System (RMS). The data will address the general condition of the roofs and will present recommendations for any additional services that may be required. The scope of services will be limited to a visual survey and does not include actual testing of the roofs; therefore, if problems are suspected, additional services will be recommended.

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If requested or deemed necessary to be studied, the following areas would require Wight to engage outside specialized consultants or vendors to provide a more detailed, technical assessment. This would be provided at a cost outside our fee proposal, but would only be authorized following presentation to, and acceptance of, a proposal by the District. These areas could include:

- Public address, phone systems, clock and security systems
- Instructional technology equipment and communications systems
- Theatrical equipment such as lighting, rigging
- Specialty equipment in Industrial Arts/Technology labs
- Foodservice equipment
- Playground equipment
- Bleacher seating inspections
- Video inspection of sewer lines
- Structural system/component investigations
- Special artwork or historic preservation analysis

Educational Alignment Study

In this study area, we measure the effectiveness of the buildings and sites to support current educational programs, the quality of the learning environments for students, and the ability of the physical structures to support recognized best practices in future-ready learning. The process will commence with a kick-off meeting to more deeply understand current educational programs and practices, planned changes and the vision of the District. Site visit walkthroughs of the nine school facilities identified in the Understanding section will be conducted. These will be completed with a team of education-focused architects with participation of the school principal and/or District administrators. The Educational Alignment Study will be closely aligned with Wight’s knowledge of best practices of future-ready learning environments and will be evaluated and scored across multiple metrics. Wight’s Educational Alignment Study guide will serve as a common tool to observe, document, score, and comment on each school.

The three primary categories of study include:

Campus Context ... an outside view of the school’s setting and surroundings. We consider the surrounding neighborhood, adjacent transportation impacts, and the overall external context to measure the appropriateness of the learning environment to nurtures success. We also explore safety and security issues, logistics of students, vehicular, and pedestrian access to the site, around the site, and into the school building. Finally, we evaluate the physical and inspirational qualities of the school to understand how well it appeals to students and visitors and reflects the character of the community.

Facility Configuration ... a macro-level study of the school. This area will focus on the building organization and configuration. By analyzing plans and touring each school, the assessment team traces the building’s spatial organization with regard to public access, entry and exiting sequences, grade level and classroom groupings, and adjacencies of spaces and usage. Circulation routes are closely documented and analyzed to identify possible areas that can be re-aligned with future-ready learning concepts. These components help assess and define the educational character and functionality of the school building.

Learning Space Characteristics ... a micro-level analysis of the various “places and spaces” where learning happens. From this viewpoint we examine the classrooms, library, studios, laboratories, and other educational-support spaces, like corridors and community rooms, where teachers and students engage for instructional activities.

In taking a more in-depth look at each school’s core learning spaces the characteristics we consider include physical characteristics, health and comfort, furniture/equipment, and supports of the use of instructional technology.

As part of the Educational Alignment Study, we will study the indoor Learning Environment Quality utilizing Wight’s Indoor Environmental Comfort Evaluation (IECE) approach. This evaluation will assess attributes in a learning space that contribute to an occupants’ comfort level. Studies have shown correlation between these attributes and a student’s ability to learn. These attributes: acoustics, temperature, relative humidity, CO2 and lighting (artificial and natural) are measurable and can be compared to industry recognized benchmarks and best practices.

We will provide the necessary professional staff and equipment to conduct an on-site, IECE survey of primary educational spaces. Spaces will be sampled during periods when they are occupied and being utilized for their regularly scheduled functions. Background noise levels will need to be sampled during times when the spaces are unoccupied.

Every effort will be made to sample spaces during times when comfort levels are likely to be stressed. Data will be collected and evaluated against industry established ranges for the comfort attributes previously mentioned to benchmark each space. Our tablet-based application will combine the readings and provide an overall rating for each space that will be summarized in color on a floor plan diagram for each school. Results of the IECE survey will be incorporated into the final Educational Alignment Study findings.

In conjunction with the above study components, we will review the District’s prior analysis of capacity, utilization and enrollment projections. This will allow the study to consider the current space utilizations and efficiencies with the future enrollment and demographic trends (to be provided by the District), cross-District equity issues (if applicable) and potential adjustments to grade level configurations (if applicable). The Facility Assessment process will conclude with the preparation and presentation of findings to the District and/or Board of Education for acceptance before moving onto the efforts related to developing a Long-Range Facility Plan.

Step 2 - Development of a Long-Range Facility Plan

Information gathered from the Facility Assessment Phase will guide the direction of the Long-Range Facility Planning process. This process would begin with a visioning workshop to establish guiding principles and parameters to be used in shaping the plan. While working with a District-based Core Facility Planning Committee, we will begin developing multiple school-specific planning concepts for possible addition, renovation and other improvements. We anticipate multiple meetings with school administration to review and revise planning concepts. We will explore planning options for relocation of the early childhood program from the Green Bay facility. Preliminary project budget estimates will be developed to begin forecasting financial needs, and timelines/sequence of work will be mapped out to consider alternate means of implementation.

We anticipate that the District-based Core Facility Planning Committee mentioned above would include members of the community that are not directly affiliated with the District. Throughout this process we have

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assumed, and included in the proposal, up to three committee meetings (not including the visioning workshop) to work through the planning process (from approximately mid-May through early September.) If additional meetings are required with the Core Facility Planning Committee, we will notify the District if additional compensation will be requested. Due to the timing of this work effort we do not anticipate a broader community engagement initiative being included within this phase of work.

Upon completion of this step, we will generate a Long-Range Facility Planning document for the District. The Plan will look big picture across District-wide issues and at a campus level to create a specific Site & Facility Master Plan for each school. The resulting Plan will define the general scope/packaging anticipated for future work, delineate improvements for each school, provide an overall timeline and sequencing of improvements. We will work with the District's construction management firm to provide information to assist in cost estimate development. Development of graphics will include two-dimensional floor plan and site plan conceptual drawings as required to illustrate proposed changes at each school. Wight will participate in presenting the recommended Long-Range Facility Plan to the Board of Education as requested.

Step 3 - Community Engagement Initiative

Following acceptance of the recommended Long-Range Facility Plan, Wight will support the District in taking out the plan to the community (if required) for further review and comment. At this time, it is too early to anticipate what level of effort would be required.

SCHEDULE

Our intended schedule of activities will generally follow the preliminary timeline presented in our February 8, 2018 interview. As indicated in this schedule, the intent would be to complete all required activities early in the 2018-2019 school year to support further community engagement and committee work. We are open to adjusting specific dates, milestones and activities with the District to align with the timelines of the Board of Education's Strategic Vision. Preliminary milestone targets would be:

- Step 1 - Completion and approval of the Facility Assessment step by early-mid May 2018
- Step 2 - Completion of the Long-Range Facilities Plan by early-mid September 2018
- Step 3 - Community Engagement Initiative during the 2018-2019 school year as required

COMPENSATION

We propose to provide the professional services described above for fixed fee amounts as outlined below.

Step 1 - Facility Assessment

We propose to provide the professional services described above for a fixed amount of One Hundred Forty-One Thousand Seven Hundred Dollars (\$132,600.00) for the seven elementary schools and two middle schools outlined in the Understanding section. This is based on the following:

- \$56,600.00 Partial Physical Condition + Educational Alignment – Wight
- \$20,250.00 Site / Civil – Eriksson Engineering
- \$43,750.00 Building Enclosure – Inspec, Inc. (balance of Physical Condition Assessment)
- \$12,000.00 For developing reports, conducting review meetings, developing customized presentation graphics, and making formal presentations of findings

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In addition, we propose to provide Physical Condition Assessments only for Lincoln Elementary School, Elm Place Middle School and Green Bay Early Childhood Center/Administrative Offices for a fixed amount of Thirty-Nine Thousand One Hundred Dollars (\$36,400.00).

- \$12,100.00 Partial Physical Condition – Wight
- \$ 6,750.00 Site / Civil – Eriksson Engineering
- \$14,550.00 Building Enclosure – Inspec, Inc. (balance of Physical Condition Assessment)
- \$ 3,000.00 For developing reports, conducting review meetings, developing customized presentation graphics, and making formal presentations of findings

Step 2 - Development of a Long-Range Facility Plan

We propose to provide the professional services described above for a fixed amount of One Hundred Thousand Dollars (\$100,000.00). This is based on the following:

- \$75,000.00 for development of multiple planning concepts, preliminary two-dimensional imagery, massing studies as deemed necessary, outline scope narratives, meeting/coordination with the District’s construction manager to assist with cost estimate development.
- \$25,000.00 for visioning workshops, committee meetings, customized presentation graphics, presentations to the Board of Education, and development of final long-range facility planning documents

If scope increases beyond what is described within this proposal, Wight shall notify and discuss with the District possible additional compensation beyond the fixed fee amount.

Step 3 - Community Engagement Initiative

We recommend that a professional services fee for the anticipated community engagement Initiative be refined and accepted at the end of the above two steps following Board of Education discussion and agreement on how best to move forward. Once this direction is determined, and all priorities aligned, we will be able to get a better handle of the level of community engagement activities required.

Invoicing will be developed based on effort completed to date and then reviewed with you and submitted upon completion of the work effort. Reimbursable expenses for direct costs incurred will be in addition to our professional service costs. Qualifying items will be invoiced at 1.10 times the direct cost incurred. For the type of work being conducted we anticipate the likely direct costs to be for typical travel expenses at government established rates, general printing/reproduction services, outside printing services for graphics, display boards and deliverable materials. We estimate/ recommend that Five Thousand Dollars (\$5,000.00) should be set aside for these items outside of the compensation described above.

Any detailed three-dimensional interior and/or exterior imagery, renderings, models or animations that may be necessary to communicate an actual proposed appearance or aesthetics would be in addition to the above costs and require additional time for building design and development of graphics.

FOLLOW UP STEPS

Following approval of this proposal, it is understood that Wight and the District will commence development of a Master District Architect Agreement using a typical American Institute of Architects (AIA) Agreement. This Agreement shall include a master fee schedule outlining compensation for future projects based on project type and construction costs.

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North Shore School District 112
Facility Assessment and Long-Range Facility Planning Services
February 15, 2018
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Thank you for the opportunity to submit this fee proposal to assist you with this exciting project. We look forward to a successful process and the opportunity to have a long-term relationship with North Shore School District 112.

Respectfully submitted,

WIGHT & COMPANY

Bradley A. Paulsen, AIA
Senior Vice President, PK-12 Education Practice Leader

Jason Dwyer, AIA, LEED AP
Group President, Design & Construction

Accepted on behalf of North Shore School District 112

Name

Title

Date

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APPENDIX

Additional information on the Mechanical, Electrical and Plumbing (MEP) portion of the Physical Condition Assessment. The approach and scope for this component of the study will include:

- We will meet with the building maintenance personal at each site to discuss the MEP/FP systems to get their input on the types and their opinion of the existing systems.
- After each meeting we would walk the schools to visually inspect each of the systems and their equipment to assess their condition, approximate age, efficiency and reliability.
- We will use the data gathered from the meeting with the building personal and our findings from the inspection of each system to organize preliminary recommendations regarding maintain, repair or replace.
- We will have a follow-up meeting with the District to summarize our findings and recommendations.
- We will then provide a written description of each of the systems and physical condition summary that that depicts the life expectancy, years in service, useful life left, the condition of the system

Systems and components to be studied will include:

Mechanical Systems

- Cooling Systems: Chillers, Cooling Towers, DX Condensing units, Pumps, Chilled Water Piping, Insulation
- Heating Systems: Steam Boilers, Hot Water Boilers, Heat Exchangers, Radiant/Unit Heaters, Fin Tube Radiators, Pumps, Steam/Hot Water Piping, Insulation
- Air Handling Systems: Packaged A/C Units, Air Handling Units, Exhaust Fans, Fan Coils, Unit Ventilators, Terminal Devices, Ductwork, Insulation
- Temperature Controls: DDC System (Direct Digital Controls), Pneumatic System, GUI Controls (Graphic User Interface)

Plumbing/Fire Protection Systems

- Water Heaters, Plumbing Fixtures, Domestic Water Booster Pump, Domestic Hot Water Piping

Electrical Systems

- Power Systems: Main Electrical Service #1, Main Electrical Service # 2 (if present), Emergency Electrical Service, Generator, Central UPS, Distribution Panels, Branch Panelboards, Surge Protection
- Lighting Systems: Interior Lighting, Interior Lighting Controls, Building Exterior Lighting, Site Exterior Lighting, Site/Exterior Lighting Controls, Exit Lighting, Emergency Lighting
- Branch Power: Receptacles
- Fire Alarm Systems: Main Panel (Addressable, Zoned or Hybrid), Annunciator, Initiation/Notification Devices