

LYME-OLD LYME SCHOOLS

Regional School District #18

A Private School Experience



in a Public School Setting

PK-8 Building Committee Meeting

January 17, 2023

Committee Members Present: Steven Wilson, Chair; Mary Powell St. Louis, Vice-Chair; Ken Biega; Richard Conniff; Darren Favello; John Hartman; Sara Hrinak; Tom Kelo; Andrew Russell; Alan Sheiness; Cara Zimmerman

Committee Members Remote, via Zoom: none- ALL PRESENT

Administration Present: Ian Neviaser, Superintendent of Schools; Ronald Turner, Director of Facilities & Technology; Brian Howe, Assistant Facilities Director; Kelly Enoch, Principal of Mile Creek Elementary School; Mark Ambruso, Middle School Principal; Noah Ventola, Center School Principal; Allison Hine, Lyme School Principal

I. Call to Order:

The meeting was called to order by Steve Wilson at 6:30pm.

Welcome and introductions by Ian Neviaser.

II. Establish meeting schedule: agenda item moved for needs of committee members present.

Open discussion of schedule of meeting schedule, resolving in a tentative meeting schedule as described below.

Next meeting Feb 15, to review of qualifications of applicants and create short list for interviews.

Interview meetings dates TBD. Meetings will need to start at 5pm to allow for each firm to present for ½ hour, have a group discussion between applicants, and then discuss all candidates at the end.

Other scheduled meetings will include, 3/20/23; 4/17/2023; 5/15/2023 and 6/19/2023.

Additional meetings will be scheduled as needed. In addition, for future meetings, paper copies will not be provided, instead members asked to bring their own printed copies or a device or use a district provided Chromebook. User log-ins will be created for members needing them.

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III. Review Committee Charter:

Ian Neviasser highlighted the role of this sub-committee of the Board of Education, with decision-making and voting authority limited as provided by this charter. With this authority, the Building Committee will recommend an Owner's Representative, Project Architect, and Construction Manager to the Board of Education for approval. The Board of Education will have the final approval of all.

IV. Review and possibly approve RFQ's for architectural and design services and owner's representative:

Review of RFQ's Architectural and Design services and Owner's Representation discussion lead by Ian Neviasser with member contribution. Differences between Architect, Construction Manager and Owner's Rep were explained and questions answered. Discussion on benefits of having an Owner's Rep, further discussion can be completed after interviews.

Attention drawn to laid out aggressive schedule to get someone on board, HVAC grant requires construction be complete by Dec 2024- grant qualification met, awaiting approval notice.

The Time Line in RFQ, 2nd page, notes to publish by Jan 20th, applicants can submit questions by Jan 31st, Qualifications due by Feb 3rd- architects and construction managers well aware we are in this process. Interviews will be on around Feb 27th for Architect. Construction Manager and Owner's Rep. If decision made, recommendation will be presented to the March 1st BOE meeting.

Motion made from Richard Conniff to move forward with the schedule for RFQ and Owner's Representatives as outlined in each draft document. Seconded by Ken Biega, all in favor, and approved.

In discussion a request for architect qualifications to be sent out to all committee members prior to interviews as google drive documents.

Questions for interviewing for architect- Ken will provide a suggested list and the committee will decide on protocol / etiquette of interview procedures.

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V. Adjournment:

The meeting adjourned at 8:10 p.m. by Richard Conniff and seconded by John Hartman.

REQUEST FOR QUALIFICATIONS
Lyme-Old Lyme Middle School, Center School, Lyme Consolidated School and Mile Creek
School Renovation Project.

ARCHITECTURAL AND ENGINEERING SERVICES

Regional School District No. 18
(Lyme-Old Lyme Schools)
Board of Education
49 Lyme Street
Old Lyme, CT 06371

January 20, 2023

The Connecticut Regional School District No.18 through its Pk-8 Building Committee ("RSD 18") is seeking qualification statements from qualified architectural and engineering firms for the design, construction documents, and construction administration, as further defined in the attached contract (Attachment A) of four school projects: Center School, Lyme Consolidated School, Lyme-Old Lyme Middle School, and Mile Creek School.

This procurement shall be in accordance with Conn. Gen. Stat. Sec. 10-287. Qualifications statement from respondents shall be evaluated and RSD 18 shall select the four most qualified respondents based on the statutory and other specific criteria set forth in this RFQ. Evaluation and selection of the four most qualified respondents shall be made by RSD 18 in its sole discretion and in the best interests of RSD 18. The four selected respondents shall be invited to submit fee proposals. Selection of the respondent, if any, shall be made with due consideration of price and the factors necessary for faithful performance of the work based on the criteria and scope of work included in the request for qualifications and the respondent's proposal.

Responses to this Request for Qualification ("RFQ") shall be in a bound booklet with a table of contents and tabs for each heading. Six (6) copies of the response are to be submitted to the office of Mr. Ronald Turner, Director of Facilities and Technology, Regional School District No 18, 49 Lyme Street, Old Lyme CT, 06371 by 2:00 p.m. on February 6, 2023. Late proposals will not be accepted and will be returned unopened. Specifications may be obtained from the district website at www.region18.org. The school district reserves the right to reject any or all submissions.

I. Project Overview

A. Project Background

In 2021, The RSD 18 commissioned a study to develop a comprehensive plan to address facility deficiencies at Center School, Lyme Consolidated School, Mile Creek School, and Lyme-Old Lyme Middle School. RSD 18 decided to pursue an as-new renovation and addition at Mile Creek School, and HVAC replacements, code compliance, safety, and security updates at Center School, Lyme Consolidated School, and Lyme-Old Lyme Middle School. The conceptual designs, conceptual

project budgets and educational specifications were accepted by the Board of Education, and a referendum was passed in November of 2022 for the four projects in the amount of \$57,555,000.

Center School was built in 1934 and is located at 49 Lyme Street in Old Lyme, and contains a Pre-K program, a post graduate program, an alternative secondary school program, and the BOE Central offices. While the building envelope and materials are generally in good condition, the HVAC system is at end of life for most components. Lyme Consolidated School was built in 1934 and is located at 478 Hamburg Road in Lyme, and contains grades K-5. While the building envelope and materials are generally in good condition, the HVAC system is at end of life for most components. Lyme-Old Lyme Middle School was built in 1957 and is located at 49 Lyme Street in Old Lyme and contains grades 6-8. While the building envelope and materials are generally in good condition, the HVAC system is at end of life for most components. Mile Creek School was built in 1963 and is located at 205 Mile Creek Road in Old Lyme and contains grades K-5. Mile Creek requires a classroom expansion for student enrollment, and updated HVAC to be renovated "as-new."

In June of 2022, RSD 18 applied for a priority list renovate as-new and addition grant for Mile Creek School. In December of 2022, RSD 18 applied for HVAC grants for Center School, Lyme Consolidated School, and Lyme-Old Lyme Middle School. All four grant applications were submitted to the State of Connecticut Office of School Construction Grants and Review, and RSD18 expects to hear on the grant commitments in January of 2023.

B. Project Descriptions

Mile Creek School will be expanded from the existing 53,000 square feet up to 67,000 square feet for additional classrooms. The as-new renovation project will consist of, but not be limited to, new HVAC systems, code compliance, doors & windows, ceilings, and finishes. Center School is 37,000 sf, Lyme Consolidated School is 35,000 sf, and Lyme-Old Lyme Middle School is 88,000 sf; all three of these projects consist of code compliance, safety and security, along with HVAC systems replacement and related architectural ceilings and components disturbed by the HVAC work.

II. Project Schedule, Site Visit and Construction Delivery Method

A. Schedule

The overall project schedule for the 3 HVAC projects will run simultaneously for all three projects. This schedule will result in phased owner occupancy construction starting in 2023 and final completion no later than December 1, 2024. The Mile Creek School as-new renovation and addition project will bid later in 2023. Owner occupied construction will begin in 2024 at Mile Creek with final construction completion expected in 2025. The architect design team awarded with this work will hold contracts for all four of these projects, with the goal of consistent design systems and components and expeditious delivery of design and construction.

The tentative designer selection schedule is as follows:

- | | | |
|----|---------------------|------------------|
| 1. | RFQ Published: | January 20, 2023 |
| 2. | Questions Deadline: | January 31, 2023 |
| 3. | Questions Response: | February 3, 2023 |

- | | | |
|----|--|-------------------|
| 4. | Qualifications Due: | February 6, 2023 |
| 5. | Short-list of no more than four respondents: | February 13, 2023 |
| 6. | Request for Fee Proposal: | February 14, 2023 |
| 7. | Submission of Fee Proposal: | February 21, 2023 |
| 8. | Interview of the four respondents, if necessary: | February 27, 2023 |
| 9. | Tentative Architect Award Date: | March 1, 2023 |

All questions are to be emailed to Ron Turner at turnerr@region18.org no later than 2:00PM on January 31, 2023.

B. Site visit

A site visit and interviews will be arranged for short-listed firms.

C. Construction Delivery

RSD18 will retain the services of a Construction Manager "At Risk" for the four projects during construction. The Construction Manager (CM) will also provide preconstruction services for estimating, construction schedule and constructability review of the design and construction documents. Each of the four projects must be bid separately in order to qualify for state grant aid. The CM awarded with this work will hold contracts for all four of these projects. By having a single CM for all of the projects, the owner is attempting to maximize consistency in construction materials and systems, and expedited delivery and completion.

III. Project Budgets

The total budget for all four projects is \$57,555,000 as approved by the local referendum. Individually, as submitted in the grant applications, the project budgets are as follows: Mile Creek \$24.9M, Center School \$7.4M, Lyme Consolidated \$8.3M, and Lyme-Old Lyme Middle School \$17M.

IV. Special Requirements - State Coordination

The plans and budgets will be subject to review by the State of Connecticut Department of Administrative Services Office of School Construction Grants & Review (OSCG&R). The selected design team will be required to coordinate all OSCG&R submissions including the building project, and any submission packages deemed necessary to maintain the schedule. The selected firm will work with a third-party code consultant retained by RSD 18 to obtain a building permit for the pre-bid conformance review meetings. Candidates shall demonstrate project experience and knowledge of these state requirements. Experience with projects similar in size and scope of this project is equally important.

V. Statement of Qualification Proposal Requirements

The following is a list of the Statement of Qualifications elements required for the submission:

1. Letter of Interest

2. A copy of architectural/engineering licensure by Connecticut Department of Consumer Protection. A copy of the licenses of the lead architectural firm, licensed individuals, and all proposed subconsultants shall be provided with your proposal.
3. A profile of the lead design firm. The profile shall include:
 - Resumes of lead staff designated to the project. Include a brief description of the role of each key staff member.
 - Geographic location of the headquarters of the firm.
 - Description of equipment, facilities and other resources assigned to this project.
 - Statement of financial condition of the firm and the ability to appropriately support the required efforts for a project of this size and scope.
4. A list of sub-consultants and roles. Provide the names and addresses of each sub-consultant. Include relevant experience of each sub-consultant. At a minimum, provide the following sub-consultants information:
 - Site / Civil
 - Structural
 - Mechanical / Engineering / Plumbing
 - Interior design
 - Information Technology / Security Consultant
 - Acoustical Engineer
5. List a minimum of five completed school projects in the past ten years that are similar in size and scope to this project. Information for each project shall include the following:
 - Project name, location, and owner.
 - Building Committee chairman or owners project manager, including contact information.
 - Superintendent of the school district under which the project was designed including contact information.
 - Initial project budget, final cost, initial completion date, actual completion date, total change orders (owner requested changes, unforeseen conditions, and design team coordination, errors, or omissions).
6. Provide a narrative on the project approach you propose for this project and a corresponding schedule.
7. Include a statement of experience with OSCG&R as described in section IV above.
8. Include a statement of team experience with High Performance or LEED Certified projects.
9. Include the firm's current workload (projects in design and or construction with anticipated completion dates).
10. Provide a list of litigation history for the past ten years.

V. Insurance Requirements

Contractor shall agree to maintain in force at all times during the contract the following minimum coverages and shall name RSD 18 as an Additional Insured on a primary and non-contributory basis to all policies, except Workers Compensation. All policies should also include a Waiver of Subrogation.

Insurance shall be written with Carriers approved in the State of Connecticut and with a minimum AM Best's Rating of "A-" VIII. In addition, all Carriers are subject to approval by RSD 18.

		(Minimum Limits)
General Liability	Each Occurrence	\$1,000,000
	General Aggregate	\$2,000,000
	Products/Completed Operations Aggregate	\$2,000,000
Auto Liability	Combined Single Limit	\$1,000,000
Professional Liability	Each Occurrence	\$5,000,000
Umbrella/Excess Liability	Each Occurrence	\$5,000,000

If any policy is written on a "Claims Made" basis, the policy must be continually renewed for a minimum of two (2) years from the completion date of the awarded contract. If the policy is replaced and/or the retroactive date is changed, then the expiring policy must be endorsed to extend the reporting period for claims for the policy in effect during the contract for two (2) years from the completion date.

Workers' Compensation and WC Statutory Limits Employers' Liability

EL Each Accident	\$100,000
EL Disease Each Employee	\$100,000
EL Disease Policy Limit	\$500,000

Original, completed Certificates of Insurance must be presented to RSD 18 prior to contract issuance. Contractor agrees to provide replacement/renewal certificates at least 30 days prior to the expiration date of the policies. Should any of the above described policies be cancelled, limits reduced or coverage altered, 30 days written notice must be given to RSD 18.

VI. Evaluation Criteria

The RSD 18 will utilize the following criteria to evaluate each firm's Statement of Qualifications:

1. Firm and key personnel's experience with projects of similar size and scope
2. Organization / assigned team structure for this project
3. Current workload and availability of the team
4. Financial stability of the firm
5. Ability to design within the established schedule and budget
6. Approach to, and understanding of, the project
7. To the extent not included above, the statutory criteria set forth in Conn. Gen. Stat. Sec. 10-287

VII. Design Team Selection Process

A. Review Process

RSD 18 will review all submissions. The Committee will determine a short list of no more than four firms, request fee proposals, potentially interview, and make a final selection.

B. Presentation and Interview

The firms to potentially be interviewed will be determined by RSD 18. Key members of the proposed design teams are expected to participate in the interview. The following criteria, not listed in priority order, will be addressed in the interview for the final evaluation and selection of the design team:

- Relevant experience of the members of the design team assigned to these projects
- History and involvement with of the team members with OSCG&R projects
- Clarity and method of presentation
- Knowledge of the proposed projects key issues
- Proposed approach and schedule
- Questions concerning evaluation criteria as defined herein.

Although RSD 18 plans to select the design firm through a "Quality Based Selection Process" not solely based on proposed fee, the selected firm's proposed fee will be examined to ensure its consistency with that of competing firms. If agreement upon a fee for services from the firm of first choice cannot be reached, RSD 18 may choose to engage an alternate firm. However, RSD 18 reserves the right to reject any and all proposals, to negotiate with any respondent, and to waive informalities and technical defects if it finds, in its sole judgment, that it would be in the best interests of RSD18 to do so.

VIII. Form of Contract

The form of contract the successful respondent, if any, shall be required to execute is attached hereto as Attachment A. By responding to this RFQ, the respondent agrees and warrants that it will execute the attached contract.

IX. Attachments

Attachment A – AIA Document B133-2019, as modified.

Attachment B – Owner's Facilities Study

DRAFT

REQUEST FOR QUALIFICATIONS
Lyme-Old Lyme Middle School, Center School, Lyme Consolidated School and Mile
Creek School Renovation Project.

OWNER'S REPRESENTATIVE SERVICES

Regional School District No. 18
(Lyme-Old Lyme Schools)
Board of Education
49 Lyme Street
Old Lyme, CT 06371

January 20, 2023

A. Introduction

The Regional School District 18 Board of Education ("RSD 18") is soliciting statements of qualifications ("RFQ") for the provision of Owner's Representative Services of four school renovation projects: Center School, Lyme Consolidated School, Lyme-Old Lyme Middle School, and Mile Creek School.

This procurement shall be in accordance with Conn. Gen. Stat. Sec. 10-287. Qualifications statement from respondents shall be evaluated, and RSD 18 shall select the four most qualified respondents based on the statutory and other specific criteria set forth in this RFQ. Evaluation and selection of the four most qualified respondents shall be made by RSD 18 in its sole discretion and in the best interests of RSD 18. The four selected respondents shall be invited to submit fee proposals. Selection of the respondent, if any, shall be made with due consideration of price and the factors necessary for faithful performance of the work based on the criteria and scope of work included in the request for qualifications and the respondent's proposal.

B. Background

In 2021, The RSD 18 commissioned a study to develop a comprehensive plan to address facility deficiencies at Center School, Lyme Consolidated School, Mile Creek School, and Lyme-Old Lyme Middle School. RSD 18 decided to pursue an as-new renovation and addition at Mile Creek School, and HVAC replacements, code compliance, safety, and security updates at Center School, Lyme Consolidated School, and Lyme-Old Lyme Middle School. The conceptual designs, conceptual project budgets and educational specifications were accepted by the Board of Education, and a referendum was passed in November of 2022 for the four projects in the amount of \$57,555,000.

Center School was built in 1934 and is located at 49 Lyme Street in Old Lyme, and contains a Pre-K program, a post graduate program, an alternative secondary school program, and the BOE Central offices. While the building envelope and materials are generally in good condition, the HVAC system is at end of life for most components. Lyme Consolidated School was built in 1934 and is located at 478 Hamburg Road in Lyme, and contains grades K-5. While the building envelope and materials are generally in good condition, the HVAC system is at end of life for most components. Lyme-Old Lyme Middle School was built in 1957 and is located at 49 Lyme Street in Old Lyme and contains grades 6-8. While the building envelope and materials are generally in good condition, the HVAC system is at end of life for most components. Mile Creek School was built in 1963 and is located at 205 Mile Creek Road in Old Lyme and contains grades K-5. Mile Creek needs a classroom expansion for student enrollment, and updated HVAC to be renovated "as-new."

In June of 2022, RSD 18 applied for a priority list renovate as-new and addition grant for Mile Creek School. In December of 2022, RSD 18 applied for HVAC grants for Center School, Lyme Consolidated School, and Lyme-Old Lyme Middle School. All four grant applications were submitted to the State of Connecticut Office of School Construction Grants and Review, and RSD18 expects to hear on the grant commitments in January of 2023.

C. Proposed Contract Services

RSD 18 requires the services of a qualified professional experienced in similar projects to act as the Owner's Representative. This professional will be responsible for management of all phases of the project including, but not limited to, grant preparation and management, design planning, architect/engineer management, construction supervision, field verification, change order review, recordkeeping, and project close-out. The attached **contract** outlines the services required by this RFQ.

D. Selection Process

The solicitation, review and selection process to be used for procurement of the professional services firm for the project will be conducted as outlined in the following four phases:

1. A public notification (Request for Qualifications) shall be made requesting qualifications from firms interested in providing the services.
2. A short list of no more than four (4) firms shall be established by RSD 18 based on objective criteria including, but not limited to, the firm's proposed personnel, qualifications and capabilities, and factors set forth in Conn. Gen. Stat. Section 10-287, as indicated in the response to the Request for Proposals.
3. The four most qualified firms shall be invited to submit fee proposals.

4. The selected firms will be required to make a formal 30-minute presentation at an interview followed by Q & A.
5. A final selection will be made on the basis of the presentation, references and information provided in the proposal response including, but not limited to, the following criteria:
 - a. The firm's and the firm's proposed project team members' experience with projects of similar size and scope. The firm will be committed to assigning the "proposed project team" to this project;
 - b. Number of years in business and the financial condition of the firm;
 - c. Demonstrated ability to work with RSD 18 as a member of a team for the benefit of the school district;
 - e. Demonstrated knowledge of project management services including experience managing a project through the State of CT OSCGR;
 - f. Recommendations from previous clients with an emphasis on working with boards of education and the support of educational facilities;
 - g. Scope of services offered and firm capabilities;
 - h. References and reputation;
 - i. Fee structure (including the proposed fee as a percentage of total construction costs, reimbursable rates, expense multipliers and the like);
 - j. Insurance capabilities and costs for project specific insurance.
 - k. Such evaluation criteria shall include due consideration of the proposer's pricing for the project, experience with work of similar size and scope as required for the order or contract, organizational and team structure, including any subcontractors to be utilized by the proposer, for the order or contract, past performance data, including, but not limited to, adherence to project schedules and project budgets and the number of change orders for projects, the approach to the work required for the order or contract and documented contract oversight capabilities.

D. Required Information

Responses to this Request for Qualifications and Proposal shall include the following information:

1. Firm history
 - a. Name of firm, and location of principal and branch offices;
 - b. Number of years in business under current name or any other name;
 - c. Firm ownership structure;
2. Personnel
 - a. List total number of firm's and/or team's personnel, other than secretarial/clerical, by professional or skill group (i.e., Architects, Engineers, Cost Estimators, etc.).
 - b. List any outside firms that will be used to provide such services as estimating, value engineering analysis, scheduling or computer services.
 - c. Identify your company's proposed management team for the project. Provide an organizational chart identifying all of your key staff members and showing how each interacts with other staff members assigned to this project. For each key staff member, include a detailed resume that summarizes:
 1. Education, including name of institution, field of study, degree(s) earned and year(s) received;
 2. Professional registration(s) and/or professional society membership(s);
 3. Professional experience.

Please note that the personnel proposed by the firm shall be the personnel used for the project. Substitution of personnel shall not be allowed without the written consent of RSD 18, which it may grant or deny in its sole discretion. Substitutions will be allowed

if a member of the proposed project team ceases to be employed by the firm. This will be a contract requirement.

3. Firm Experience

- a. List all projects of a similar nature, with emphasis on projects performed in the State of Connecticut, in which the firm has provided design and/or construction administration services for the past five years. The following information is requested on each completed project:
 1. Project name and address;
 2. Year completed;
 3. Reference (name, position and telephone number).
 4. For each project listed, include information concerning and demonstrating adherence to project schedules and project budgets and the number of change orders for projects, the approach to the work required for the order or contract and documented contract oversight capabilities for each project.
 5. Experience with and involvement with OSCGR

Submission of these names shall constitute your permission for RSD 18 to contact those individuals.

- b. Provide any information on any involvement in litigation or arbitration. Explain the circumstances that led to it and describe the resolution.

4. Insurance

- a. Provide a description of the firm's standard insurance;
- b. Provide the cost per million for additional professional liability insurance. State any cap on available professional liability insurance.
- c. State whether the insurance set forth in the attached contract can be procured.

E. Form of Agreement

The form of contract the successful respondent, if any, shall be required to execute is attached hereto as Attachment A. By responding to this RFQ, the respondent agrees and warrants that it will execute the attached contract

F. Format of Response to Request for Proposal

Responses to this Request for Proposal shall be in a bound booklet with a table of contents and tabs for each heading. Six (6) copies of the response are to be submitted to the office of Mr. Ronald Turner, Director of Facilities and Technology, Regional School District No 18, 49 Lyme Street, Old Lyme CT, 06371 by 2:00 p.m. on January 5, 2023. Late proposals will not be accepted and will be returned unopened.

G. Questions and Clarifications

Any questions or clarifications should be directed to the Mr. Ronald Turner, Director of Facilities and Technology, Regional School District No 18 via email at turnerr@region18.org. No telephone calls will be accepted. Responses to questions submitted shall be provided to all known respondents to this Request for Proposal. No questions will be accepted or answered after January 31, 2023.

RSD 18 reserves the right to reject any or all responses submitted. RSD 18 reserves the right to communicate with any respondent to seek clarifications in any responses. RSD 18 reserves the right to waive any informality or defect in any or all proposals if such action is in the best interests of RSD 18. The selection of the successful firm, if at all, will be based on several factors including, but not limited to, qualifications, track record, experience, and price and required by Conn. Gen. Stat. Section 10-287. To that end, RSD 18 reserves the right to award this contract to a firm other than the lowest bidder if, in its sole discretion, it is in RSD 18's best interests to do so.

H. Proposed Schedule of Procurement

1.	RFQ Published:	January 20, 2023
2.	Questions Deadline:	January 31, 2023
3.	Questions Response:	February 3, 2023
4.	Qualifications Due:	February 6, 2023
5.	Short-list of no more than four respondents:	February 13, 2023
6.	Request for Fee Proposal:	February 14, 2023
7.	Submission of Fee Proposal:	February 21, 2023
8.	Interview of the four respondents, if necessary:	February 27, 2023
9.	Tentative Contract Award Date:	March 1, 2023

I. Attachments

Attachment A – Form of agreement

Attachment B – Owner's Facilities Study

DRAFT