REQUEST FOR PROPOSAL

Construction Manager Services
Due Date: October 30, 2025
Submit to Ben Prather - pratherb@elmbrookschools.org

INTRODUCTION

The School District of Elmbrook ("District") is seeking to partner with a qualified construction management firm with statewide exposure and specialization in public K-12 educational facility planning. The district seeks to develop a 20-year Facility Plan and associated financing strategies that may include a referendum.

Specifically, the District is seeking a construction manager to provide facility assessment, facility planning, option development and costing, and phasing strategies. In a similar fashion, the District is hiring an Architectural services firm, and the selected Construction Manager will be asked to work seamlessly in coordinating and collaborating with the Architectural firm throughout the development of the 20-Year Plan. While the district expects to have the 20-Year Facility Plan substantially complete by April 2026, it should be clearly noted that implementation phases beyond the Facility Plan are subject to School Board approval.

In addition to the services associated with the 20-Year Facility Plan, the District is also seeking a construction partner to help with the continued execution of its 10-year capital maintenance plan which, over the last 10 years, has yielded $60 million in facility maintenance and improvements without going to referendum. The selected firm will serve as the lead construction manager (CM) for the District's large, annual facility improvement projects. Recent projects include Fairview South School renovation ($3.5M in 2025), high school pool and locker room renovations ($3.6M in 2023 & 2024), and a Robotics lab at Brookfield East ($1.6M in 2023).

BACKGROUND

The School District of Elmbrook serves over 7,800 students and has experienced slow, steady enrollment growth over the past 10 years. Enrollment is expected to flatten over the next several years, although demand for housing by families with children far exceeds the current supply which could result in a continued upward enrollment trend.

Included in the District's facility portfolio are five elementary buildings, two middle schools, and two high schools. In addition, the District has a facility that serves a small, special education cooperative, another that is leased to a Montessori school, and a new district office (2020). The District also leases space for its high school LAUNCH program. Facility profiles are linked at the end of this document.

The District has preserved a $2.8 million annual operating budget to address facility maintenance needs and prioritizes an additional $2.3 million for Fund 46 capital improvement needs each year. Over the past 10 years this approach has yielded an investment of $60 million in facility maintenance and capital improvements across the District. Further, the Board of Education has actively managed its facility portfolio by closing one elementary school in 2012 and approving the sale of three District properties over the past eight years.

REQUEST FOR PROPOSAL
Construction Manager Services
Due Date: October 30, 2025
Submit to Ben Prather - pratherb@elmbrookschools.org

In April 2008 a capital referendum in the amount of $62.2M was passed with 52% support to remodel both high schools, swimming pools, and site improvements. In 2000, a referendum was passed to build two new elementary schools; Brookfield Elementary and Dixon Elementary. They were designed with identical footprints in order to save costs.

SCOPE OF SERVICES
While the District's efforts to prioritize funds in support of facility maintenance and capital improvement projects have been a differentiator amongst our peers, the age of some of our facilities are putting pressures on facility improvement needs that will soon exceed available financial resources. The District seeks assistance in the creation of a 20-year facility plan that prioritizes and anticipates the District's current and future facility needs.

The selected construction management and architectural services firms are expected to assist the District's Administrative Team and Board of Education in reviewing recently conducted Education Adequacy, Facility Maintenance, and Security assessments, as well as the District's Capital Maintenance Plan, and to use that information to guide options development and phasing strategies. The CM will be responsible for developing all associated project budget modeling, constructability reviews, and support the development of all project phasing strategies.

Once a 20-year facility plan has been established, the Board of Education may endorse a referendum strategy to meet some or all of the needs as early as the November 2026 ballot. Based on preliminary forecasts, the District could assume an additional $60M-$120M of debt with minimal tax impact (no impact to $.45 per $1,000 of assessed value).

Project Implementation - Construction Management Services
It is the intent of the district to enter into two contracts for the selected firm:

1. A contract for the services related to the development of the District's 20-Year Facility Plan (Phase 1 outlined below). For any future phase efforts, the District would enter into a separate, Construction Management - At-Risk contract. In this model, the CM would hold all the subcontracts, and provide a single bond for the entire project as a single source of construction responsibility. The District will secure a pre-negotiated fee from its Architectural Services firm and pay such firm directly from the School District
2. A separate, Construction Management – At-Risk contract will be issued for the District's annual capital improvement plan projects.

REQUEST FOR PROPOSAL
Construction Manager Services
Due Date: October 30, 2025
Submit to Ben Prather - pratherb@elmbrookschools.org

PHASE 1 - Pre-Construction: (Estimated Timeline: September 2025 - June 2026)

The selected construction management firm will assemble a team of specialists to provide the following services during the 20-Year Facility Plan development project:

1. The construction manager shall review and understand recent facilities assessment reports completed under previous contracts.
2. The construction manager shall work with the Architectural Services firm and assist the Administration and Board of Education in identifying and prioritizing potential facility plan project components.
3. The construction management firm shall perform constructability reviews of the plans and specifications throughout multiple stages of design
4. The construction management firm shall attend 8-10 Board work sessions as needed and serve as a resource for the Administration in developing presentation content.
5. The construction management firm shall work with the architectural firm and assist the Administration and Board of Education in developing phased facility planning scenarios that address identified District priorities and project components.
6. The construction management firm shall provide cost estimates for all proposed facility planning scenarios.
7. The construction management firm shall assist the Administration and Board of Education in narrowing and finalizing the scope of the 20-Year Facility Plan.

POTENTIAL PHASE II (Estimated Duration of 3-4 Months)
Should the Board of Education authorize a future referendum, the selected construction management firm will provide the following services:

1. Supply information for the development of key messages regarding referendum fact sheets and other informational materials.
2. Support strategy and coordination of referendum information / open house events.
3. Provide ongoing consultation to the Administration and the Board of Education, as needed.

REQUEST FOR PROPOSAL
Construction Manager Services
Due Date: October 30, 2025
Submit to Ben Prather - pratherb@elmbrookschools.org

POTENTIAL PHASE III (Estimate 12 Months for Design, 18-24 Months for Construction)

The timeline for Phase III is dependent upon the work of Phase 1 and any referendum outcome.

Construction Management Services

1. Coordination with District and project stakeholders
2. Conduct weekly construction progress meetings
3. Document control of correspondence and all relevant project records
4. Track and expedite contractor submittals and RFI's with the architect
5. Track and process contract change orders
6. Review and comment on contractor schedule submittals
7. Review and approve contractor payment requests for submission to client
8. Coordinate field inspection and testing
9. Monitor and report on contractor labor compliance
10. Daily coordination with contractors
11. Attend coordination meetings with the client to discuss project issues
12. Produce monthly progress reports for distribution to client and stakeholders
13. Produce punch-lists for project completion

Close-out Responsibilities Include:

1. Transfer final project records to client
2. System testing and client maintenance staff training, as appropriate
3. Deliver warranties and certificate of occupancy to client
4. Claims support, as required
5. Write and submit a Final Summary Report for the project Services will include coordination with District's architect and associated design professionals, as well as monitoring building contractors and construction professionals hired by the District to undertake design and construction of the facilities.

Responsibilities listed above are not a comprehensive list of CM responsibilities.

REQUEST FOR PROPOSAL
Construction Manager Services
Due Date: October 30, 2025
Submit to Ben Prather - pratherb@elmbrookschools.org

SUBMITTAL REQUIREMENTS

Construction managers who meet the expectations described above are invited to submit proposals with the following components:

1. **Firm Profile**: Provide a brief overview of your firm, officers, the number of years your firm has been providing construction management services, as well as other services performed.
2. **Why You:** Indicate why your firm should be chosen for this project (Limit to 1 page).
3. **Consultants**: Identify and provide background information on consultants that would be engaged as part of the project team.
4. **School District Clients**: Provide a list of school districts for which the firm has completed similar construction management services.
5. **Education Experience**: Provide examples of education projects managed by the firm that are similar in nature. Include dates and project costs (both initial budget and final construction costs). Explain your role and process provided throughout the project from pre-referendum to a successfully completed construction project.
6. **Firm Ownership:** Indicate if your firm is owned or partially owned by any other organization or individuals. If so, state the name and address of said organization or individuals.
7. **Firm's Methodology:** Describe your approach to management of the construction budget, schedule, selecting sub-contractors, maintaining quality and project safety.
8. **Fees:** See fee structure requirements below
9. **Litigation and Ethics Information:** List any current or concluded litigation involving your firm within the past ten (10) years specifically including Client involvement. Describe your firm's involvement in the matter and the outcome of the matter if concluded.
10. **Dismissal from Project:** List all projects from which the firm was dismissed prior to completion in the past five(5) years and the reasons for the dismissal.

FEE STRUCTURE

Fees must be listed in your proposal to be considered for this project and should address:

1. Any fees associated with Phase 1 and/or Phase 2 construction management services

In order for Respondents to accurately project general conditions and related costs for a potential Phase 3 construction, this RFP includes a scenario project that shall be used for the creation of a General Conditions cost proposal. The purpose of this scenario is to establish projected costs that will be used for proposal comparison and as a basis for adjustment, should the project successfully proceed to Phase 3.

Scenario - $80M Referendum, $68M Estimated Cost for Construction (85%)

REQUEST FOR PROPOSAL
Construction Manager Services
Due Date: October 30, 2025
Submit to Ben Prather - pratherb@elmbrookschools.org

Scenario timeline: Referendum passes Nov 2026, Design in 2027, Construction begins in 2028

Pilgrim Park Middle School - Additions and Renovations

- Project Cost = $46M,
- Construction Cost $39.1M
- Duration 18 months

Tonawanda Elementary – Renovations

- Project Cost = $20M
- Construction Cost $17M
- Duration 18 months (with a possible break or limited work during the school year)

Other Capital Improvement Projects (spread across 4 other buildings)

- Project Cost = $14M
- Construction Cost $11.9M
- Duration 8 months (primarily Summer 2028 and Summer 2029)

Phase 3 Proposed Fees (Assume Construction begins in 2028)

1. Provide construction management fees for Phase 3 construction, to include a full-time, on-site superintendent and full-time project manager
2. List work that could potentially be self-performed and provide the percentage of mark-up on self-performed work
3. Provide the percentage of mark-up on bid categories
4. Provide the percentage of mark-up on change orders
5. Provide a list showing general conditions categories and if they will be included in the fee or as a reimbursable cost.

EVALUATION / SELECTION PROCESS

Construction Management firms submitting Proposals are advised that all proposals will be evaluated to determine the firms that will be able to meet the needs of the District. The selection criteria will
include, but not be limited to, the items listed below:

- Alignment to the School District of Elmbrook's Mission and Vision
- Experience and expertise of the firm on education projects
- Past record of meeting time schedules and budgets for comparable projects
- Completeness and quality of the Proposal
- Demonstrated commitment to industry best practices
- References for recently completed projects
- In-person interview, if invited

- Fee schedules

The School District of Elmbrook will be the sole judge of these factors and reserves the right to reject any or all proposals that do not meet the outlined criteria. All costs associated with the preparation of a response is the sole responsibility of the submitting vendors.

Facility Walkthrough Option

Meetings with District personnel and/or a walk-through of existing schools will be conducted on October 15, 2025 from 12pm-3pm. Contact Ben Prather (pratherb@elmbrookschools.org) for details.

Background Information Files Include:

- Elmbrook Schools' Facility Profiles
- 10-Year Capital Improvement Plan
- Pilgrim Park Educational Adequacy and Facility Maintenance Assessment Summaries
- Tonawanda Elementary Educational Adequacy & Facility Maintenance Assessment Summaries
- Board Work Session Presentation from August 26 Providing an Overview of the Facility Planning Approach

DIGITAL SUBMISSION

Proposals shall be submitted via E-MAIL to Ben Prather, Assistant Superintendent of Business Services (pratherb@elmbrookschools.org). Submit one signed copy of your entire proposal in a single Adobe Portable Document (.pdf) format. Acknowledgment of receipt will be provided via an email response. No paper format hard copies are to be provided. Based on the proposals submitted, a select number of firms will be invited to attend an in-person interview which is tentatively scheduled for the evening of Monday, November 10.