

Request for Qualifications & Proposal

For: Owner's Representative
Services

Posting Date: January 29, 2024
Response Deadline: February 19,
2024



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**REQUEST FOR QUALIFICATIONS &
PROPOSAL OWNER'S REPRESENTATIVE
SERVICES**

REQUEST FOR QUALIFICATIONS

Services Overview

Through this Request for Qualifications and Proposal, the **Village of Antioch** invites responses from qualified firms who possess the experience, capability, and expertise in Owner's Representative Services. The scope of work is further outlined in the Project Information section.

The Owner's Representative must have a proven track record of successfully providing services to municipalities of comparable size and complexity and will work directly with the Village's leadership team.

This RFQ/P is not an Invitation to Bid. Responses will be evaluated on the basis of the relative merits of the qualifications. There will be no public opening or reading of responses received by the Village pursuant to this request.

Description of Village

The Village of Antioch, Illinois is nestled into the Chain O' Lakes waterway system. The Village is located in the northern part of Lake County, bordering the Wisconsin state line. Antioch is located approximately halfway between the major cities of Chicago and Milwaukee.

As of the 2020 census, the population was 14,622 and continues to grow. The Village is a non-home rule community governed by a Mayor-Trustee form of government. The Village of Antioch's over 8.2 square miles includes over 5,033 housing units.

Since 1892, Antioch has provided a high quality of life for its residents and businesses. The Village is a full-service organization consisting of 75 full-time employees. The Village consists of six departments, including Administration/Village Clerk's Office, Community & Economic Development, Finance, Parks & Recreation, Police, and Public Works.

RFQ/P Submission

RFQ/P submissions are due by **February 19, 2024** before **11:00 a.m.** CST.

**The Village of Antioch
874 Main Street
Antioch, IL 60002
Attention: Acting Village Administrator Geoff Guttschow**

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Qualifications and proposals must be enclosed in a sealed envelope (or other sealed container): the submission must clearly display “**Request for Qualifications & Proposal – Owner’s Representative Services**” for **The Village of Antioch** and the respondent’s company name.

Submittals should be prepared as standard 8-1/2” x 11” letter size via PDF, and shall be limited to 50 pages, exclusive of required attachments. Front and back covers, table of contents pages and tabbed divider pages will not be counted if they do not contain submittal information. The information should be submitted in a double sided, readable, and/or bound in a book format. Electronic submissions should also be sent but four hard copies shall be submitted. Each submission must be delivered by the due date and time; documents received after the established deadline will not be considered. The Village shall not be responsible for the loss, non-delivery, or physical condition of documents sent by postal or courier/parcel service. Each respondent is responsible for the full cost and expense of his/her/its submission.

Anticipated Village Schedule to Award the OR Services

RFQ/P Released	January 29, 2024
Last date to submit questions/clarifications.	February 12, 2024
RFQ/P Due to Village	February 19, 2024
RFQ/P Interview List Released	February 26, 2024
Interview Process	March 4, 2024
Committee recommends firm for Board Approval	March 13, 2024
Award by the Board of Trustees	

Respondents’ Inquiries and Addenda

The Village reserves the right to make clarifications, corrections, or changes in this RFQ/P at any time prior to the time Proposals are due. The Village reserves the right to withdraw this RFQ/P at any time prior to the time proposals are due.

Questions and requests for information must be submitted in writing via email before February 12, 2024 at 12:00 p.m.. to Dennis Heimbrot Director of Public Works at dheimbrodt@antioch.il.gov.

The Village will issue addendums and/or responses to RFI’s to known respondents to the RFQ/P. It is the respondent’s responsibility to notify the Village that it is planning to submit by contacting Rachel Alcozer at (847)395-1000 ext. 1303 or ralcozer@antioch.il.gov, and asking to be placed on the respondents list. Failure to receive an addendum/response is not cause for delay in submission.

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General Information and Notifications

- a) Respondents are advised to carefully review all sections of this RFQ/P carefully, and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the submission. Qualifications which depart from or materially alter the terms, requirements, or scope of work defined by this Request may be rejected as being non-responsive.
- b) Joint venture and cooperative qualifications may be considered, provided that their use is clearly indicated in the submitted qualifications.

Purpose

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

Owner's Representative (OR)

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

As the point person, the Owner's Representative is the Village's project leader responsible to oversee and coordinate the activities of the Village's design and construction team and to provide the primary coordination between the Village (Village Board, Public Works Department, Administration and Staff) and the design and construction team. The Owner's Representative works closely with and reports to the Village Administrator in the financial administration of the project as it relates to budget status and reporting, contract change order approval, and project financial tracking and reporting for the Village. All direction and communication with all entities of the project from the Village runs through and is coordinated by the Owner's Representative under the direction of the Village Administrator.

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

General Terms & Conditions

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

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

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

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

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

This RFQ/P does not commit the Village of Antioch to enter into a contract. The Village of Antioch reserves the right to reject any/all submissions, award one contract, award multiple contracts, or delay award of contract(s) beyond the date specified, in response to this RFQ/P.

Selection Criteria and Process

The tentative date for the interview (subject to change as may be required) is **March 4, 2024**. A reasonable inquiry for additional information may be conducted by the Village as to respondents past performance, financial stability, and ability to perform on schedule, within budget, and in a fashion which results in customer satisfaction with quality results.

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

A final evaluation of all the presenting Respondents will be made by the Selection Committee in order to determine the best qualified for the project. The Selection Committee shall determine the selection of respondents for the interview process by reviewing the written qualifications of the respondents based on the responses to the RFQ/P. A "short list" of an estimated 3-5 firms may be developed. These firms or a lesser number will be invited to an interview with the Selection Committee.

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

Recommendation by the selection committee is based on the combination of the proposer's response to the Submittal Requirements, the composition, and qualifications of the proposer's staff for this project, the interview process, and proposed fees and costs. The Selection Committee recommended firm will be submitted to the Village Board for approval. The Village, following Board Approval, may then enter negotiations with the selected firm and ultimately execute a contract upon completion of negotiated contract terms and fees. The final contract terms and fees must be approved by the Village Board.

Freedom of Information Act

All information submitted to the Village in response to this RFQ/P will be a public record and will be subject to disclosure, subject to applicable exemptions, under the Illinois Freedom of Information Act, 5 ILCS 140, et. Seq. ("Act") after the potential award of a contract. Firms are advised that Section 7(1) (g) of that Act exempts the following information from disclosure: Trade secrets and commercial or financial information obtained from a person or business where the trade secrets or commercial or financial information are furnished under a claim that they are proprietary, privileged or confidential, and that disclosure of the trade secrets or business, and only insofar as the claim directly applies to the records requested. Firms that desire to have portions of their proposals considered for this exemption should identify those portions accordingly.

Project Information

The project is subject to approval of budgets and funding by the Village of Antioch. The Board may suspend or terminate any project at any stage up to and including following receipt of bids.

The Project scope is to renovate an existing building to become the New Village Hall, and to Construct a New Public Works Facility. Space needs analyses have already been conducted by Williams Architects for the new Village Hall and new Public Works facilities. The space needs Analysis must be integrated in the completion of the project.

Individual Projects Include:

- Village Hall Building Rehabilitation. The former Centegra building (935 Skidmore), has been acquired by the Village. This project requires altering the building from medical use to functionality for a Village Hall. This will require architectural design for the alterations to the building, with plans to add an addition at a later date. Following

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design, the project would be put out for bid and Construction.

- Construct a New Public Works Facility. The existing Public Works facility is dilapidated and space restricted. The current office is an old trailer and fails to meet the needs of the expanding Village. Office, staff, vehicle repair space and equipment storage is not sufficient. A larger salt storage structure is also required. The facility is largely in the floodplain/floodway of the Sequoit Creek, and the facility is surrounded by residential. A new location for Public Works has been identified.

It is anticipated that the new Village Hall renovation/ construction work will start in Spring of 2024 and continue into 2025. The New Public Works Facility construction is scheduled to begin in summer of 2024.

Total Anticipated Budget for the Cost of Work: \$15,000,000 to \$20,000,000

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

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

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

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

- a. Principal-in-Charge / Project Executive (recommended 15 years' experience in municipal Projects).
 - b. Project Manager (recommended 10 years' experience in municipal Projects) and include percentage of time Project Manager will be on site (if needed).
 - c. Construction Site Representative (recommended 5 years' experience in municipal Projects).
 - d. Administrative Staff (if needed).
 - e. Any other assigned staff.
5. **Experience and References:**
- a. Profile several municipal clients and/or projects specifically related to our owner's representative needs that your firm has performed within the past five years.
 - b. Provide a brief overview of other municipalities your firm has worked with that illustrates the depth, experience, and service capabilities of your firm with municipal clients:
 - c. Number of years the firm has provided Owner's Representative Services for municipal projects.
 - d. Provide a minimum of three (3) projects of similar scope and type your firm has completed in the past five years, including:
 - Project name, location, and Community: Name, title, telephone number and email of municipal contact,
 - Name, address, telephone number and email of project architect, and
 - Project description including size in square feet, schedule, and services provided.
6. Describe the planning processes your firm has developed that illustrates the depth, experience, and service capabilities of your firm.
7. Define your typical insurance coverage for Owner's Representative Services.
8. List all public sector Owner's Representative Projects that your firm is currently involved with, and the estimated value of each. Include state of completion and contact person.
9. List a minimum of three (3) construction manager/contractor references with whom your organization has worked with in the past five (5) years. Submit company name, contact person, and phone number.
10. List a minimum of three (3) architect references with whom your organization has worked with in the past five (5) years. Submit company name, contact person, and phone number.
11. List a minimum of three (3) municipal client references with whom your organization has worked with on similar projects in the past five (5) years and include their contact information.

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12. Supporting Data: Include any other supporting data which you feel will assist the Village in evaluation of your firm.
13. Service Offerings/Approaches:
 - a. Describe the firm's view and approach to the role of Village Owner's Representative in partnering with the Village of Antioch, Architect and Construction Manager.
 - b. Describe the firm's responsibility for participating in the "change order process" during construction.
 - c. Describe the firm's familiarity and assistance with obtaining or processing grants, rebates, or utility incentives.
 - d. Discuss the approach to value analysis / controlling cost at various points in the design, bidding, and construction process. Provide an example of proposed cost reduction developed on a recent project during the pre-construction phase.
14. Litigation
 - a. Litigation and Ethics Information: List any current or concluded litigation involving your company within the past five (5) years specifically including client involvement. Describe your company's involvement in the matter and the outcome of the matter if concluded. List all entities from which you are legally barred from working.

Compensation:

The Owner's Representative shall provide a fee and costs proposal in a separate sealed envelope. (Envelope shall be labeled "Fee and Costs Proposal"). The Owner will open proposals at the conclusion of all interviews.

1. Professional Fee
 - Should be stated as a fixed fee based on the anticipated cost of work and proposed schedule.
 - Fee % of total scope of work will not be considered.
2. Staff Hourly Rates - List all staff hourly rates for the project duration.
3. Staff / Firm Monthly Rates - should schedule exceed beyond current planned duration.
4. Reimbursable items
5. List items that will be requested as reimbursable on top of fee. All reimbursement expenses shall be at the actual expense incurred by the Owner's Representative without markup.
6. Invoicing: Owner's representative shall submit invoices monthly describing in reasonable detail the service provided in the preceding month.

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GENERAL SCOPE OF SERVICES

The primary role of the Owner's Representative is to act as the Village's primary agent and representative of the Village in order to help ensure that the project is completed according to the Contract Documents within the currently approved project budget and schedule.

The Owner's Representative will be responsible for assisting the Village with advising on and assisting with coordination of four primary phases including: 1) Pre-construction; 2) Design; 3) Construction; 4) Post Construction / Project closeout.

The Owner's Representative shall establish and implement procedures for and maintain coordination or activities and communication on behalf of the Village and between the Village, the Architect, Engineers, and the Contractor.

OWNER'S REPRESENTATIVE GENERAL SERVICES

1. **Pre-Construction Services:**

- 1.1. Review annual budget items to assist the Village in prioritizing these items and refining item budget cost estimates.
- 1.2. Identify for the Village a list of Project Consultant professionals required to develop the Project that has not already been envisioned.
- 1.3. Develop an initial Project development schedule describing the steps and duration of the major tasks required to develop the Project.
- 1.4. Identify other parameters, such as code, zoning, land use or other such restrictions, which have a potential impact on the design development or construction of the Project.
- 1.5. Work with Project Architect to refine the current Project program and master plan.
- 1.6. Review and refine the preliminary Project budget outlining the expected costs to develop the Project.
- 1.7. Develop the organizational structure of the development team, establish responsibilities, and line of authority and establish communication procedures to be used throughout the development process.

2. **Design Completion Phase:**

- 2.1. Manage the design and development team (including, without limitation, the Project Architect, and all Project Owners Representatives) throughout the entire documentation process to ensure adherence to the approved program, budget, and schedule.
- 2.2. Provide periodic review of design documents for completeness, feasibility, constructability, and appropriateness of building systems and materials.
- 2.3. Provide periodic budget checks throughout the design process and cost estimating for all components of the Project and propose and review value engineering alternates required to maintain the Project budget.

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- 2.4. Recommend any design changes required to maintain the Project Budget.
 - 2.5. Identify required site studies, such as soil and environmental reports, necessary to design and obtain construction permits for the Project.
 - 2.6. Assist the Village, Project Architect and/or Contractor in the review of the Project with code officials and submission of the Project to obtain required building permits.
 - 2.7. Work with the Project Architect and Village staff to prepare bid packages.
 - 2.8. Review contractor submittals and make recommendations. Assist the Village with negotiating the contractor contracts and Project Architect contract if project delivery method requires this action.
 - 2.9. Develop and manage a Project accounting process to include receipt and review of all Project related invoices and payment applications, and assembly of such documents into a monthly draw package. Submit this package to the Village with recommendation for payment and manage and/or monitor payment by the Village.
 - 2.10. Establish and monitor any FF&E delivery / procurement process with Village staff for adherence to the approved Project budget and schedule.
 - 2.11. Maintain Project records and Project communication procedures throughout the development process.
 - 2.12. Provide advice on selection of Project Consultants.
3. **Construction Phase:**
- 3.1. Provide on-site representation throughout the entire construction process as the Village's representative.
 - 3.2. Monitor the development and maintenance of the construction schedule by the Contractor(s) and maintain and update the overall project schedule as necessary.
 - 3.3. Conduct regular on-site meetings with the Contractor(s), Project Architect, and other appropriate development team members (including, without limitation, the Project Owners Representatives) to coordinate and maintain the construction process.
 - 3.4. Review and coordinate all Requests for Information from the Contractor(s) for timely response by the Project Architect. Review and monitor all supplemental instructions and directives for potential impact on the project budget and schedule.
 - 3.5. Review all invoices and applications for payment from the Contractor(s) and design team and include all approved requests in the monthly draw package to be submitted to the Village for payment.
 - 3.6. Provide a monthly report to the Village that summarizes the status of the Project costs and schedule.
 - 3.7. Review change proposals submitted by the Contractor(s) for appropriateness and accuracy and recommend acceptance and/or payment of such changes to the Village.
 - 3.8. Monitor the submission of shop drawings and product samples by the

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Contractor(s) and response and review by the Project Architect for timeliness and appropriateness.

- 3.9. Monitor the procurement, warehousing, delivery, and installation of any FF & E with Village staff and associated vendors and contractors to ensure timeliness.
 - 3.10. Develop with the design team and Contractor the construction punch lists for all areas of the Project. Monitor implementation and completion of all punch list items.
 - 3.11. Monitor the acquisition of all government approvals, by the Contractor, required to receive all requisite certificates of occupancy, including, without limitation, all site plans, special exception, subdivision, zoning, and other land use approvals.
 - 3.12. Maintain all Project records throughout the construction process.
 - 3.13. Coordinate with third-party insurance and risk management Owners Representatives and monitor compliance with insurance requirements by the Contractor, Project Architect, and Project Owners Representatives.
 - 3.14. Provide advice and assistance to the Village in resolving construction issues, claims, and disputes prior to engagement of a lawyer to handle the matter (excluding legal advice and arbitration and litigation support).
 - 3.15. Recommend appropriate levels of contingency to carry during all phases of the Project.
4. **Post-Construction Phase:**
- 4.1. Assist the Contractor(s) and Village in conducting all move-in operations, equipment demonstrations and training, system start-ups and testing, and other transitional requirements.
 - 4.2. Manage the close-out of the construction contract; punch list completion and receipt of documentation of all final lien waivers and other close-out documents, such as as-build surveys.
 - 4.3. Close out the Project accounting and provide the final status of the Project budget.
 - 4.4. Obtain on behalf of the Village, and turn over to operations all keys, manuals, plans, and specification, and all product and warranty information pertaining to the Project.
5. **Village Board Meetings:**
- 5.1. The Owner's Representative will attend Village Board meetings, as necessary, and assist in providing presentations to the Village Board members and other stakeholders.