



REQUEST FOR PROPOSALS
Owner's Representative for Lake County Educare Project
September 6, 2023

TO BE CONSIDERED, PROPOSALS MUST BE RECEIVED BY 4:00 PM (CST) ON
OCTOBER 2, 2023

LATE PROPOSALS WILL NOT BE ACCEPTED

I. BACKGROUND AND PROJECT DESCRIPTION

Start Early is seeking Owner's Representative services to support the new construction of an early learning facility in Zion, Illinois, or Beach Park, Illinois for the Educare of Lake County project.

Start Early was founded in 1982 as the Ounce of Prevention Fund, a nonprofit public-private partnership. Since the beginning, we have delivered best-in-class doula, home visiting and Early Head Start and Head Start programs and advocated for thoughtful policies and adequate funding at the local, state, and federal levels. From our roots directly serving families and children on Chicago's South Side and rural Illinois, we have expanded nationwide impacting early childhood programs and policies with partnerships in 25 states. Our role as on-the ground practitioners continues to be the bedrock of our expertise and source of innovation and leadership in the field.

Our story is focused on the idea that starting early and nurturing the attachments between children and adults are essential to a child's present and future well-being. Decades of research have proven that quality early childhood programs are a smart investment. Our founder, businessman and philanthropist Irving B. Harris, understood that the best hope for leveling the playing field and allowing children to thrive is to invest in the earliest days and create intensive, long-term support for a developing child and their family. For 40 years, Start Early has been a champion for quality early learning and care, focused on closing the opportunity gap for our youngest learners.

We are seeking an Owner's Representative to manage the project with an approximate total project budget of \$20,000,000. That will include the construction of an approximately 35,000 square foot state-of-the-art Educare early learning center for 174 children and families.

Background

Start Early completed an early childhood landscape analysis of Lake County, met with local stakeholders, and reviewed local assessments before making the decision to focus on Beach Park and Zion as potential community areas for the Lake County Educare. Start Early is in the process of further exploring the potential land options in these areas in partnership with the communities. Start Early has also secured anchor funding for the project. Start Early will be able to leverage insights gained from building and operating the first Educare as well as the knowledge and experiences of the 25 other Educare programs built across the nation that are part of the Educare Learning Network.

We hope to select an Owner's Representative by October 13, 2023, so they can work in partnership with Start Early to manage the project budgets, assist with work to secure loans if needed, manage the bidding and selection of contractors and oversee construction project completion according to the scope of work.

All phases of construction and close out must be completed by January 31, 2025. (See Attachment B for a proposed timeframe.) When submitting the proposal please break out the proposed scope of services and costs associated with: Planning/Pre-Construction Services and Construction.

In responding to this RFP, please feel free to suggest a different project timeline / scope of services if you think that would be more appropriate to completing the work.

Working with Start Early

Our core values lay the foundation for our identity and the way we do our work. They reflect our ongoing commitment to instilling a culture that makes Start Early a great place to work and supports our role as a catalyst for change. [See more on our website.](#)

- **Empowerment** - Listen Well
- **Appreciation & Respect** - Do What We Say We Will Do
- **Learning** - Be Curious, Keep Learning
- **Communication** - Collaborate to Deliver Our Mission
- **Diversity** - Drive Change Together
- **Excellence** - Focus on Results

In addition to our core values, we want to prioritize staff and community perspectives throughout the design, procurement, and construction. We expect the Owner's Representative to work closely with the Start Early team to ensure key vendors (architect, contractor, etc.) collaborate closely together and have a demonstrated passion and experience with leading community architecture along with participatory design processes for soliciting community input on the design and build of projects.

We have also highlighted additional design principles we expect to shape the approach and physical space:

- Diversity, Equity & Inclusion
 - We want the vendors we work with to be reflective of the community in which we serve, prioritizing minority-owned, women-owned, local businesses.
 - We want the space to be at the forefront of inclusivity for children and families, including those with disabilities and dual language learners.
- Continuity of Programming
 - Educare Lake County will be one of 27 early learning centers across the country. We want to ensure that all Educare spaces embody the same excellence and high standards.
- Innovation & Environment
 - Start Early believes that all children have the right to environments that support their healthy development and that the impacts of climate change undermine the development and physical safety of young children. Taking a climate focused approach to the design and construction of the Educare space is essential.

II. SCOPE OF WORK

Serve as owner's representative in all aspects of the construction and renovation project. We plan to use the services outlined in the basic services of the agreement attached to this RFP (See Attachment C for a draft form of Agreement) as a guide for services requested including:

Throughout the Project

- Schedule and facilitate regular project meetings.
- Be available to meet with Start Early Facilities Committee and other pertinent meetings as needed.
- Throughout the project, assist Start Early to manage any local, state, and federal reporting processes.
- Work with Start Early and design team to co-lead stakeholder and community engagement process.
- Prepare and update a Project schedule including timing of anticipated services and construction work.
- Coordinate requirements with federal, state, and local agencies.
- Advise on project delivery methods.

Project Initiation Phase

1. Review budget and assist in updating project budget and schedule.
2. Pre-qualify consultants, vendors and contractors to be considered for the project, based on Start Early's goals and specific project requirements.
3. Assist with site selection.
4. Prequalify architectural firms for the project.
5. Draft and issue solicitation to select an architect.
6. Review bids and provide recommendation to Start Early.
7. Draft and issue a Notice of Award letter to the selected architect.
8. Assist Start Early and its attorney on agreement to be used and negotiations with the architect and other contractual agreements for vendors, contractors, and consultants selected.
9. Manage hiring and coordinating Owner-provided consultants: surveyor (boundary, topographic, utility survey); environmental testing and abatement; geotechnical engineering and other consultant.
10. Prepare Requests for Qualification or Proposal documents to retain design and specialized consultant team member(s).
11. Assist Start Early and its legal counsel in negotiating terms of final contractual agreements.
12. Prepare monthly reports throughout the project including the following:

- Executive Summary – include a summary of financial status, highlights of major events and a schedule summary.
- Status of Design/Construction – summarize project activities, including changes in current anticipated start and completion dates by project elements.
- Outstanding Items – include items to be completed by the Owner's Representative, design team members, Start Early, and general contractor.
- Purchasing Activity – detail current status of long-lead materials procurement.
- Budget Status Report – include a summary of anticipated costs, status of scope changes that are approved, pending, and/or anticipated, and cash flow.
- Schedules – include schedule indicating current project status and a look-ahead plan for the following period.
- Progress Sketches/Photographs – arrange for production and distribution of professional photographs as required by Start Early.
- Anticipated Project Activity – indicate, in a narrative form, the activities of the project in the upcoming month, actions to be taken during that period, and any scheduled governing agency reviews/approvals, etc.
- Other – include such additional or revised information as shall be requested by Start Early.

Design Phase

1. Coordinate the requirements of any federal, state, or local agencies with the design team and Start Early.
2. Develop an overall design schedule and coordinate the schedule with Start Early's key milestones and desired project completion date.
3. Conduct periodic progress meeting with Start Early and the appropriate design team members.
4. Review design documents at the completion of programming, schematic design, design development and contract documents to assure design is in compliance with the owner's goals.
5. Recommend potential value engineering alternatives throughout the Design Phase.
6. Advise the design team with respect to availability and price of material, avoidance of jurisdictional disputes and feasibility of details.
7. At appropriate points in the design process, manage the preparation of cost estimates (prepared by others). The estimate shall contain the following:
 - A budget in appropriate detail to understand the various cost components of the project.

- A detailed comparison and reconciliation of the current budget against the previous budget(s) with an explanation of any variance by component.
 - A summary of all approved budget revisions.
 - A cash flow analysis of the project based on the latest budget information.
8. Consult with Start Early regarding issues that impact the constructability and feasibility of the project.
 9. Identify long lead-time items and recommend to Start Early's methods of procurement to achieve the project schedule.

Procurement Phase

1. Facilitate analysis of bid proposals and prepare written recommendations.
2. Draft and issue a Notice of Award letter to the selected contractors.
3. Assist Start Early and its attorney with contract negotiation, including the contractor's initial schedule.
4. Review permit drawings and cost estimates/preliminary bids and provide feedback to Start Early.
5. Expedite approvals and coordination issues between federal, state, and local agencies to obtain any required permits, licenses and fees for the project. In certain instances, a permit expeditor may be recommended.

Construction Phase

1. Review and negotiate the contractor's initial schedule.
2. Conduct periodic meetings with Start Early, design team, specialty consultants and general contractor. Review the project schedule, submittals, scope change, requests for information, outstanding bulletins, pending issues and field problems.
3. In instances where schedule slippage and/or schedule conflicts are forecasted to occur, make recommendations to Start Early as to how to remedy the schedule slippage and/or schedule conflicts.
4. Review monthly payment applications and submit payment requests for approval and payment by Start Early.
5. Assure all aspects of the work with utility companies involved in the project have been coordinated.
6. Conduct regular construction site observations to ensure that the general contractor's work on the project is progressing on schedule and in accordance with the requirements of the contract documents.
7. Facilitate the meaning and intent of construction document between architect and contractor.

8. Establish a quality inspection control system based on the technical sections of the specifications and applicable codes and regulations.
9. Track shop drawings, materials and all other required submittals transmitted to the architect of record to assure schedule compliance is maintained.
10. Assure the contractor establishes and maintains a complete library of all contract documents, addenda, bulletins, scope changes, approved shop drawings and material samples.
11. Change Order Management
 - a. Review all scope changes proposed by vendors, Start Early and/or design team. Make recommendations regarding feasibility, practicality, costs, effect on schedule.
 - b. Review requests for change orders required by field conditions and other unforeseen conditions and submit such appropriate requests to Start Early for approval prior to instituting any changes to the contract documents.
 - c. Receive and review all change order requests from the general contractor. Review unit prices, time and material changes and similar items. Submit recommendations to Start Early.
 - d. Monitor all scope changes during construction to ensure compliance with approved revisions.

Project Closeout Phase

1. Conduct a comprehensive final project inspection with the project team to verify that the materials furnished and work performed is in accordance with the contract documents.
2. Coordinate the preparation of punch lists indicating the items of work remaining to be accomplished. Coordinate the completion of such items in an expeditious manner.
3. Ensure a Certificate of Occupancy is obtained from the necessary authorities.
4. Ensure the architect prepares Certificates of Substantial and Final Completion.
5. Ensure that contractor assembles and delivers to Start Early all guarantees, warranties, operating and maintenance manuals required by the contract documents.
6. Coordinate equipment and systems training sessions for user personnel.
7. Expedite the preparation of "as-built" drawings for the project in accordance with the specifications.
8. Determine the value of any uncorrected and/or deficient work. Make recommendations as to the withholding of payments to the general contractor.
9. Make recommendation for final payment after determining 100% completion of Work.

III. RFP RESPONSE INSTRUCTIONS

A. Proposal Format

- *Contact Person:* All contact and questions regarding this Request for Proposal should be directed to RFP@startearly.org. A summary of questions and responses will be disseminated to all respondents by September 15, 2023. Only those representations made via written addenda shall be binding upon Start Early.
- *Proposal Due Date:* October 2, 2023 by 4 pm. All proposals must be received by Start Early no later than the date and time specified on the request for proposals. Start Early will not be responsible for proposals delivered by Proposer, Postal Department, or any other means to any location other than the provided email address.
- *Submission:* All proposals shall be saved in PDF format to RFP@startearly.org. In addition, the name and address of the proposer must appear on the cover page of the document. If you have any questions, please do not hesitate to reach out to RFP@startearly.org. Inquiries made in person or by telephone will not be accepted. Inquiries shall not be accepted after the date and time indicated in the Schedule of Activities.
- *Quantity:* Proposers shall submit one (1) electronic copy via email to RFP@startearly.org of their proposal and all attachments.
- *Page Limitation:* Proposals shall be limited to a maximum of 30 single sided pages with 11-point font, single line spacing. Proposer can provide as an attachment other relevant information the respondent would like the selection committee to consider specific to Start Early's project providing it is not marketing materials.
- *Withdrawal of Proposal:* Proposers are to submit proposals that are accurate, complete and contain all terms and conditions that they feel are necessary. If after submitting a proposal, the proposer finds changes are necessary, the proposer may change or withdraw their proposal any time up to the time of the proposal due date. However, after the due date, the proposal may not be changed or altered in any way. If accepted, a proposal is considered non-cancelable, and the proposer will be expected to honor a binding contract.

Proposals shall be valid for a period of ninety (90) days from the due date.

An award of the contract to any proposer shall not constitute a rejection of any other proposal.

- *Prohibition of Alterations.* Proposals that are incomplete or conditioned, or that contain any alterations, or that contain irregularities of any kind, or that are not in conformity with the standards set forth in this RFP may be rejected.
- *Incurred Costs:* Start Early is not liable for any costs incurred by providers in the preparation and presentation of their proposals. Proposals should be prepared simply and economically, providing a straightforward, concise description of provider capabilities to satisfy the requirements of the proposal. Special bindings, colored displays, promotional materials, etc., are not desired of the original copy. Emphasis should be on completeness and clarity of content.
- *Equal Employment Compliance Requirements.* By submitting this proposal, the proposer certifies conformance to the applicable Federal Acts, Executive Orders and Illinois Statutes and Regulations concerning Affirmative Action toward equal employment opportunities. All information and reports that are required by the State of Illinois or City of [name] Governments having responsibilities for the enforcement of such laws shall be supplied to Start Early upon request, for purposes of investigation to ascertain compliance with such acts, regulations and orders. Start Early is an equal opportunity employer. Women and minority businesses are strongly encouraged to apply for this contract.
- *Transfer or Assignment:* Neither this contract nor any interest therein shall be transferred to any other party or parties, and in case of such transfer, Start Early may refuse to carry out this contract, either with the transferor or the transferee. All rights of action for any breach of this contract by a successful proposer are reserved to Start Early. No officer of said Start Early, nor any person employed in its service, is, or shall be, permitted any share or part of this contract or any benefit which may arise here from. The successful proposer further agrees to make payment promptly as due, to all persons supplying labor or material for the implementation of the work provided for herein. The successful proposer shall not permit any lien or claims to be filed or prosecuted against Start Early for or on account of any labor or material furnished aforesaid.
- *Protests.* Any protest must be submitted in writing. Any protest of the solicitation must be in writing and received by the Chief Operating Officer by close of business on September 20, 2023. Any protest of the award must be submitted in writing and received by Chief Operating Officer within five (5) business days of the notice of intent to award the contract.
- *Disclosure of Intent.* No employee or member of Start Early's Board of Directors may own any percentage of a business that is submitting a proposal

on any awards with Start Early.

IV. PROPOSAL REQUIREMENTS

The submitted proposal shall include a readily identifiable response to each of the following:

- *Cover letter:* signed by a duly authorized agent of the company/individual, expressing the Firm's or individual's overview, office location, service area, and interest and understanding of the project.
- *Firm Overview:* Describe your Firm's relevant experience as an Owner's Representative on cultural institution projects or other projects within the region. Identify any projects that were identified as of Landmark or Historical significance.
- *Project Approach:* Describe your Firm's philosophy of service as Start Early's Owner's Representative.

Describe your Firm's approach to effective project communications, collaborative team management, and the Owner's Representative role as Start Early's representative to coordinate services of the other consultants towards accomplishment of project goals of Start Early.

Describe what special services, systems or qualifications your Firm has that would benefit Start Early in carrying out this program. Expound on any experience with other projects whose funding was grant based and what support/services you offered and what challenges you encountered.

- *Project Budget Approach:* Describe your Firm's approach to designing the Project's budget (i.e., working with design team, general contractor, etc.)
- *References:* Provide a reference contact person and phone number for relevant projects (over \$10,000,000) the Firm has completed in the last five years.
- *Project Personnel and Lead Owner's Representative:* Identify the specific personnel to whom responsibility for Start Early's project will be assigned, including individual name(s), title(s), role(s), and relevant experience. Include individual resumes as an attachment to your submission. Identify the lead project manager and provide three reference contact persons and phone numbers. Discuss other simultaneous project assignments these staff are involved with, their duration and commitment requirements as a percentage of time of the named staff.
- *Project Consultants:* If appropriate, identify the specific sub-contractors /

consultants you will hire to complete the project, including Firm name and background, as well as individual name(s), title(s), role(s), and relevant experience of those who will work on the project. Provide three reference contact persons and phone numbers. Discuss other simultaneous project assignments these staff / Firms are involved with, their duration and commitment requirements as a percentage of time of the named staff.

- *Schedule:* Provide a proposed schedule outlining key milestones and deliverables to ensure completion by December 2024. (See Attachment B for a proposed timeframe for consideration.)
- *Fee:* Detail your proposed fee, including escalation and expense for Owner's Representative services (including any sub consultants). Please break out the fee associated with: Redevelopment Phase; and Development/Construction Phase. The fee provided shall be the basis for fee negotiations with the successful Firm.
- *Insurance:* Provide a sample certificate of insurance indicating all coverage carried.

V. SELECTION PROCESS

- *Selection Committee:* The proposals shall be subjectively evaluated by the Committee with points assigned based upon desirable features. Those proposals submitted that do not meet requirements outlined in the RFP will not be rated.
- The Selection committee may consist of: Start Early staff, consultants, and representatives from the Board of Directors and other persons as deemed necessary by the Board.

The role of the Selection Committee shall include a complete review of all documents submitted and may include conferring with selected clients of the proposing Firm(s). It may also involve meeting with those Firms selected to review their proposals. Start Early will make the final decision on hiring an Owner's Representative.

- *Selection Criteria:* All proposals from qualified Firms that provide all the minimum required qualifications will be evaluated on the following criteria:
 - Firm: Demonstrated successful experience in providing owner's representative services for Educare construction projects or other similar early learning center projects by the proposing Firm. (25 points)
 - Project Team: Demonstrated recent successful experience in owner's representative services by the proposed project lead and proposed

- team including consultants and sub-contractors. (20 points)
 - Approach to Program: Knowledge and understanding of the required services as shown through the proposed approach to managing the roles and responsibilities as outlined in the scope of services. Ability to effectively manage project budgets, schedules and work of contractors, sub-contractors and design team on behalf of Start Early. Ability to represent Start Early's interests in all phases of the project. (20 points)
 - Values: Alignment with Start's Early values, community/staff experience, and demonstrated collaboration with architect, general contractor, and other members of project teams (20 points)
 - Fee: (20 points)
 - Interviews: Start Early, through the Selection Committee, if they deem necessary, may at their sole discretion invite one or more proposers to present their proposal, in person or virtually, to the committee. Interviews will be scored on thoroughness of preparation and fit with Start Early's needs. (50 points)
- *Contract and Insurance Coverage:* Within ten (10) business days after receipt of notice of proposal award, the proposer to whom the contract is awarded, shall draft and submit a written contract for Start Early's review and approval. Owner's Representative shall make any and all changes mutually agreed to by Start Early and the Owner's Representative. Upon mutual consent to the agreement, the Owner's Representative shall furnish a certificate of insurance acceptable to Start Early. Submission of a proposal indicates agreement and acceptance of all terms and conditions outlined in this RFP.
- *Disclosure:* Proposals will be considered confidential materials and will not be made a part of the public record unless so required by the State of Illinois or Lake County.

Thank you for considering this project. We look forward to hearing from you.

[Attachment A]

	Number
Preschool Classrooms	7
Infant Classrooms	3
Toddler Classrooms	3
Twos Classrooms	4
Playgrounds	3, plus patios off each classroom

[Attachment B]

High-Level Project Timeline

1. Project Initiation & Planning – November 2023
2. Design – November-December 2023
3. Procurement – January-February 2024
4. Construction – March-December 2024
5. Project Close Out – January 2025

[Attachment C]

Schedule of Activities

Request for Proposals Issued	September 6, 2023
Prospective Vendors Written Inquiry Deadline (No questions will be accepted after this date and time)	September 12, 2023
Start Early's response to written inquiries	September 15, 2023
Proposal Submission Deadline	October 2, 2023
Firm Selection	October 13, 2023
Contract	November 15, 2023
Completion of Project	January 31, 2025