

#18089-C
AGREEMENT FOR PROFESSIONAL SERVICES
For LAKE COUNTY

This AGREEMENT is entered into by and between Lake County ("County") and Globetrotters Engineering Corporation ("Consultant"), 300 S. Wacker Drive, Suite 400, Chicago, IL 60606.

RECITALS

WHEREAS, Lake County is seeking a Consultant to provide architectural and engineering services for a variety of Facility and Construction Services projects; and

WHEREAS, the Consultant is a professional provider of Architectural and Engineering services; and

WHEREAS, Lake County Purchasing Division issued Statement of Interest Number 18089 in connection with this procurement; and

WHEREAS, the Purchasing Agent and the selection committee have determined that the Proposals submitted by the Consultant on October 18, 2018 is the most advantageous proposal received, and best serves the interests of Lake County; and

WHEREAS, the Lake County Board has passed a resolution at its regular meeting on February 11, 2020 authorizing the Purchasing Agent to execute this Agreement;

SECTION 1. AGREEMENT DOCUMENTS

The Agreement Documents that constitute the entire Agreement between Lake County and Consultant are in order of precedence:

- A. This Agreement
- B. Statement of Interest (SOI) Number 18089 noted herein as Exhibit A
- C. Facility and Construction Services Request for Proposal dated 12/5/19 "TBD Misc. Architectural and Engineering Services Request" as Exhibit B

In the event of conflict between or among the above Documents, the Documents listed above are in the order of precedence.

SECTION 2. SCOPE OF WORK

Lake County's Facility and Construction Services primarily funds its design and construction initiatives out of two sources: Capital Construction Improvements and Facility Assessment Improvements. Capital Construction is associated with major one-time initiatives; major forward planning exercises or construction of a new building would fall into this category. Facility Assessment Improvements is an annual fund allocation directed at the improvement or repair and restoration of, existing County Infrastructure. Lake County believes the majority of services provided via this solicitation will be provided as part of the Facility Assessment Improvements Projects.

Facility Assessment Projects run the gamut of operational support that FCS is asked to provide. Examples of these projects are: installation of new VAV boxes in an occupied office space, extension of fire protection lines, troubleshooting an existing lighting control system, or replacement of an ADA ramp. All of these projects must be individually designed, developed, and procured in accordance with the Lake County Purchasing Ordinance. FCS has a number of vehicles in place to solicit these services including: quotes, hard bids, unit price contracts, joint purchasing agreements, and ID/IQ contractors. Consultant will provide: design, consulting, project management, and

commissioning services as requested by the County in support of the designated project within the indicated service capabilities.

SECTION 3. DURATION

This contract shall be in effect for a two (2) years period from the date of award. Lake County reserves the right to renew this contract for three (3) additional one (1) year period(s), subject to acceptable performance by the Consultant. At the end of any contract term, Lake County reserves the right to extend this contract for a period up to sixty (60) days for the purpose of getting a new contract in place.

SECTION 4. AGREEMENT PRICE

This is a time and materials agreement. Only expended hours will be billed; work will end when the hours are depleted or on November 30th of a given calendar year, whichever comes first. Not-to-exceed pricing includes all costs (labor, material, overhead, administration, profit, travel, etc.). The total value of work shall not exceed \$400,000 in a fiscal year, subject to the appropriate of sufficient funds.

<i>Employee Classification</i>	<i>Hourly Billing Rate</i>	<i>Employee Classification</i>	<i>Hourly Billing Rate</i>
Admin Services	\$98.06	Ele Design/Technician	\$98.20
Architect - 1	\$100.44	Ele Design/Fiber Optic - 1	\$84.81
Architect - 2	\$113.85	Ele Design/Fiber Optic - 2	\$134.79
Architect - 3	\$124.80	Ele Design/Fiber Optic - 3	\$181.75
Architect - 4	\$151.42	Mec-Design Eng - 1	\$100.97
CADD Oper- 2	\$100.16	Mec-Design Eng - 2	\$137.00
CADD Oper- 3	\$113.29	Mec-Design Eng - 3	\$181.72
Civil-Const Eng - 1	\$119.03	Mec-Design Eng - 4	\$204.51
Civil-Const Eng - 2	\$129.86	Proj Accountant - 1	\$106.90
Civil-Design Eng - 1	\$115.00	Proj Accountant - 2	\$173.35
Civil-Design Eng - 2	\$172.14	Resident Eng - 1	\$177.02
Civil-Design Eng - 3	\$180.26	Resident Eng - 2	\$189.03
Computer Tech	\$94.25	Struct Eng - 1	\$139.72
Const Insp - 1	\$109.28	Struct Eng - 2	\$154.20
Const Insp - 2	\$144.14	Surveyor - 1	\$79.24
Disc Manager - 1	\$224.95	Surveyor - 2	\$114.74
Disc Manager - 3	\$268.72	Surveyor - 3	\$157.42

Lake County shall make periodic payments to Consultant based upon actual progress within 30 days after receipt and approval of invoice. Said payments shall not exceed the hourly rates identified in the Agreement, and full payments for each task shall not be made until the task is completed and accepted by Lake County.

SECTION 5. PRICE ESCALATOR

Prices throughout the twelve months initial term of the contract shall remain firm/fixed. Written requests for price revisions after the first twelve months shall be submitted at least sixty (60) days in advance of the annual contract period. Requests must be based upon and include documentation of the actual change in the costs of the components involved in the contract and shall not include overhead and profit. Changes in the contract price shall be made in the amount of the actual change in cost or the percentage increase in the U.S. Average Consumer Price Index for the Midwest Urban - per category "All Items," or 3 percent whichever is less. Surcharges for fuel and/or other costs shall not be allowed. The County reserves the right to reject any price increase and to terminate the contract.

SECTION 6. INVOICES & PAYMENT

- A. An invoice will be submitted for each project task order and Consultant shall submit invoice(s) detailing the products and services provided and identify the purchase order number on all invoices. For tasks designated as "general duties, as assigned," a brief summary of project descriptions will be included.
- B. Periodic progress reports will be provided on a monthly basis, at a minimum, summarizing the work completed during the reporting period, work anticipated to be complete in the next reporting period, and any items that the Consultant may be awaiting from LCFCFS.
- C. Invoices may be submitted for work performed on a monthly basis based actual time performed in the amount not-to-exceed in Section 4. The County's fiscal year begins December 1st of each year. Prior to December 7th of any year, an invoice shall be submitted for all work completed prior to November 30th of the completed fiscal year. Submit invoice(s) detailing the services provided. Invoices shall clearly identify the work completed during the invoice period, the overall work completed to-date, as well as the percentage completion for each task identified. Payments shall be made in accordance with the Local Government Prompt Payment Act.
- D. Consultant shall maintain records showing actual time devoted and cost incurred. The County will reimburse consultant's other direct costs incurred, without mark-up which have been approved by the County. Consultant shall permit a representative from Lake County to inspect and audit all data and records of Consultant for work and/or services provided under this Agreement. Consultant shall make these records available at reasonable times during the Agreement period and for one year after the termination of this Agreement.
- E. All payments shall be made in accordance with the Illinois Local Government Prompt Payment Act (50 ILCS 505/1 et seq.).

SECTION 7. KEY PERSONNEL

Consultant shall not replace any Key Personnel without the County's prior written consent, which shall not be unreasonably withheld. Should one of the Key Personnel be reassigned, become incapacitated, cease employment by Consultant, and/or be unable to perform the functions or responsibilities assigned to him or her, Consultant shall (i) within ten (10) business days, temporarily replace them with another properly qualified employee and (ii) within thirty (30) calendar days, permanently replace the contact. Lake County reserves the right with advance notice, and Consultant having the opportunity to remedy, to request the dismissal and removal of Consultant staff from the project for reasonable cause. Any decision to substitute or replace Key Staff for the implementation of proposed solution, will need a prior written consent from the County.

- Provide a summary organizational chart. Identify the primary contact and describe the roles of each key person.
- Provide detailed resumes for all key professionals who will be directly responsible for providing services to the County. Include the following information; title, number of years at your firm, total number of years of experience, professional designations or licenses.

SECTION 8. STATEMENT OF OWNERSHIP

The drawings, specifications and other documents prepared by the Consultant for this Project are the property of the County, and Consultant may not use the drawings and specifications for any purpose not relating to the Project without the County's consent, except for the Consultant's services related to this Project. All such documents shall be the property of the County who may use them without Consultant's permission for any current or future Lake County project; provided, however, any use except for the specific purpose intended by this Agreement will be at the County's sole risk and without liability or legal exposure to the Consultant.

The Consultant shall retain its copyright and ownership rights in its design, drawing details, specifications, data bases, computer software, and other proprietary property. Intellectual property developed, utilized, or modified in the performance of the services shall remain the property of the Consultant.

SECTION 9. INDEMNIFICATION

Consultant agrees to indemnify, save harmless, and defend Lake County, its agents, servants, and employees, and each of them against and hold it and them harmless from any and all lawsuits, claims, demands, liabilities, losses, and expenses, including court costs and attorney's fees, for or on account of any injury to any person, or any death at any time resulting from such injury, or any damage to property, which may arise or which may be alleged to have arisen out of or in connection with the work covered by this Agreement caused directly by the negligence or willful or wanton conduct of Consultant. The foregoing indemnity shall apply except if such injury, death, or damage is caused directly by the gross negligence or willful or wanton conduct of Lake County, its agents, servants, or employees or any other person indemnified hereunder.

SECTION 10. INSURANCE

The Consultant must obtain, for the Contract term and any extension of it, insurance issued by a company or companies qualified to do business in the State of Illinois with an A.M. Best Rating of at least A-and provide the County with a Certificate of Insurance 15 days before the start of the project, and thereafter annually for contracts/ projects that will last more than one year. Insurance in the following types and amounts is necessary and/or where applicable:

Commercial General Liability Insurance

In a broad form on an occurrence basis shall be maintained, to include, but not be limited to, coverage for property damage, bodily injury (including death), personal injury and advertising injury in the following coverage forms where exposure exists:

- Premises and Operations
- Independent Contractors
- Products/Completed Operations
- Liability assumed under an Insured Contract/ Contractual Liability
- Personal Injury and Advertising Injury

With limits of liability not less than:

\$ 1,000,000 Each Occurrence

\$ 1,000,000 Products-Completed Operations

\$ 1,000,000 Personal and Advertising injury limit

\$ 2,000,000 General aggregate; the CGL policy shall be endorsed to provide that the General Aggregate limit applies separately to each of the contractor's projects away from premises owned or rented to contractor.

Automobile Liability Insurance (if applicable)

Automobile liability insurance shall be maintained to respond to claims for damages because of bodily injury, death of a person, or property damage arising out of ownership, maintenance, or use of a motor vehicle. This policy shall be written to cover any auto whether owned, leased, hired, or borrowed.

The Contractor's auto liability insurance, as required above, shall be written with limits of insurance not less than the following:

\$ 1,000,000 Combined single Limit (Each Accident)

Excess/ Umbrella Liability (if applicable)

The Contractor's Excess/ Umbrella liability insurance shall be written with the umbrella follow form and outline the underlying coverage, limits of insurance will be based on size of project:

\$ 2,000,000 per occurrence limit (*minimum, and may be higher depending on the project*)

Workers Compensation (Coverage A) and Employers Liability (Coverage B)

Workers Compensation Insurance covering all liability of the Contractor arising under the Worker's Compensation

Act and Worker's Occupational Disease Act at limits in accordance with the laws of the State of Illinois. Employers' Liability Insurance shall be maintained to respond to claims for damages because of bodily injury, occupational sickness, or disease or death of the Contractor's employees, with limits listed below:

Employers Liability

- a) Each Accident \$1,000,000
- b) Disease-Policy Limit \$1,000,000
- c) Disease-Each Employee \$1,000,000

Such Insurance shall contain a waiver of subrogation in favor of Lake County.

Technology Errors and Omissions (if applicable)

The Contractor's Software Developer and/or IT Architect for the plans, including developing and implementing technology for Lake County, or of the project, shall be written with limits of insurance not less than the following: \$ 1,000,000 per occurrence limit

Liability Insurance Conditions

Contractor agrees that with respect to the above required insurance:

- a) The CGL policy shall be endorsed for the general aggregate to apply on a "per Project" basis;
- b) The Contractor's insurance shall be primary & non-contributory over Lake County's insurance in the event of a claim.
- c) Contractor agrees that with respect to the above required insurance except for Workers Compensation coverage and Technology Errors and Omissions coverage, Lake County shall be named as additional insured, including its agents, officers, and employees and volunteers and be provided with thirty (30) days' notice, in writing by endorsement, of cancellation or material change. A blanket additional insured ISO endorsement is preferred for Contractors who have multiple projects with the County.
- d) Lake County shall be provided with Certificates of Insurance and the appropriate corresponding ISO form endorsements evidencing the above required insurance, prior to commencement of this Contract and thereafter with certificates evidencing renewals or replacements of said policies of insurance at least thirty (30) days prior to the expiration of cancellation of any such policies. No manuscript endorsements will be accepted. Any hard copies of said Notices and Certificates of Insurance and Endorsements shall be provided to:

**Lake County
Purchasing Division
18 N. County 9th Floor
Waukegan, Illinois 60085
Attn: RuthAnne Hall, Lake County Purchasing Agent**

- e) **Electronic copies of Notices, Certificates of Insurance and Endorsements can be emailed to Purchasing@lakecountyil.gov in place of hard copies.**

Failure to Comply: In the event the Contractor fails to obtain or maintain any insurance coverage required under this agreement, Lake County may purchase such insurance coverage and charge the expense to the Contractor.

SECTION 11. INDEPENDENT CONTRACTOR

Consultant is defined and identified as an independent contractor, not an employee or agent of Lake County and the County has no right to control or direct Consultant's manner, detail, or means by which Consultant accomplishes tasks under this Agreement.

SECTION 12. DISPUTE RESOLUTION

All issues, claims, or disputes arising out of this Agreement shall be resolved in accordance with the Appeals and Remedies Provisions in Article 9 of the Lake County Purchasing Ordinance.

SECTION 13. NO IMPLIED WAIVERS

The failure of either party at any time to require performance by the other party of any provision of this Agreement shall not affect in any way the full right to require such performance at any time thereafter. Nor shall the waiver by either party of a breach of any provision of this Agreement be taken or held to be a waiver of the provision itself.

SECTION 14. SEVERABILITY

If any part of this Agreement shall be held to be invalid for any reason, the remainder of this Agreement shall be valid to the fullest extent permitted by law.

SECTION 15. JURISDICTION, VENUE, CHOICE OF LAW AND PROFESSIONAL STANDARDS

This Agreement shall be governed by and construed according to the laws of the State of Illinois. Jurisdiction and venue shall be exclusively found in the 19th Judicial Circuit Court, State of Illinois.

SECTION 16. NOTICES AND COMMUNICATIONS

All notices and communications which may be given by Lake County to Consultant relative to this Agreement shall be addressed to the Consultant at the address shown herein below:

Globetrotters Engineering Corporation
300 S. Wacker Drive, Suite 400
Chicago, IL 60606

Copies of any notices and communications which propose to alter, amend, terminate, interpret, or otherwise change this Agreement shall be provided to: Lake County Purchasing Division, 18 North County Street, Waukegan, Illinois 60085-4350; Attention: Purchasing Agent.

SECTION 17. ASSIGNMENT

Neither the Consultant nor the County shall assign any duties of performance under this Agreement without the express prior written consent of the other.

SECTION 18. MODIFICATION

This Agreement may be amended or supplemented only by an instrument in writing executed by the party against whom enforcement is sought.

SECTION 19. TERMINATION

The County reserves the right to terminate this Agreement, or any part of this Agreement, upon thirty (30) days written notice. In case of such termination, the Consultant shall be entitled to receive payment from the County for work completed to date in accordance with terms and conditions of this Agreement. In the event that this Agreement is terminated due to Consultant's default, the County shall be entitled to contract for consulting services elsewhere and charge the Consultant with any or all losses incurred, including attorney's fees and expenses.

SECTION 20. CONFIDENTIALITY

Both parties acknowledge that Consultant's documents and dealings related to this Agreement are subject to the Illinois Open Meetings Act (5 ILCS 120/1 et seq.) and the Illinois Freedom of Information Act (5 ILCS 140/1 et seq.).

SECTION 21. NEWS RELEASES

Consultant may not issue any news releases regarding this Agreement without prior approval from Lake County.

IN WITNESS HEREOF, the undersigned have caused this Agreement to be executed in their respective names on the dates hereinafter enumerated.

Lake County:

Globetrotters Engineering Corporation

Purchasing Agent
Lake County



Ajay Shah
CEO and President

Date _____

Date 1-20-20

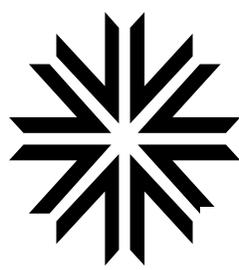


Exhibit A

Lake County

Purchasing Division

<http://doingbusiness.lakecountyil.gov/>

Waukegan Campus

Please note the submission location is:

Lake County

Attn: Purchasing Division

18 N. County Street – 9th Floor

Waukegan, IL 60085

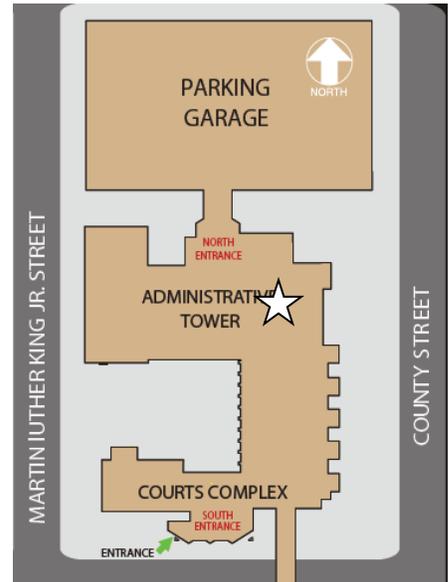
Contact information for Lake County Purchasing is:

Purchasing Division

Phone 847-377-2992

Fax 847-984-5889

Email: purchasing@lakecountyil.gov



ALL SUBMITTALS SHOULD BE LABELED ACCORDINGLY. PLEASE USE BELOW LABEL FOR YOUR CONVENIENCE.



SOI No. 18089	Deliver to: Lake County ATTN: PURCHASING DIVISION 18 N. County Street – 9 th Floor Waukegan, IL 60085
Buyer: Michael Schieve	
<u>SOI Description</u> Professional Architectural and Engineering Services for Lake County	
<u>SOI Due Date*</u> August 30, 2018 at 2:00 p.m.	

*Please note: Responses are due at the 9th floor reception desk and shall be time stamped by 2:00 p.m. local time on the required due date. Please allow sufficient time for parking, passing through security and arriving at the 9th floor.

STATEMENT OF INTEREST # 18089

STATE OF ILLINOIS Professional Architectural and Engineering Services for Lake County

Notice is hereby given that Statements of Interest (SOI) (one original and one electronic unprotected copy) will be received from qualified, professional architectural and engineering firms interested in providing the services, as described herein. Firms are encouraged to submit as much information as necessary to indicate their interest, experience, and qualifications to perform the work described for any project, service, or combination thereof. **To Lake County Purchasing, 18 N. County St., 9th Floor, Waukegan, IL 60085 until August 30, 2018 at 2:00 p.m.**

CONTACT / QUESTIONS: Please submit questions on our website at <http://lakecountypurchasingportal.com> by selecting the SOI number and addendum link. Questions may also be submitted via email to purchasing@lakecountyil.gov. All questions shall be submitted no less than seven (7) days prior to the SOI opening date. No interpretation of the meaning of the plans, specifications or other Contract documents will be made orally. Failure to request an interpretation constitutes a waiver to later claim that ambiguities or misunderstandings caused a firm to improperly submit a proposal. Lake County will review submissions and conduct negotiations in accordance with the Local Government Professional Services Selection Act (50 ILCS 510/).

LAKE COUNTY

Lake County is located in northeast Illinois, between the Chicago and Milwaukee metropolitan areas. Lake County is home to about 703,000 residents. Lake County is committed to open government and transparency, and the County board's conservative fiscal policies have allowed the County to maintain fiscal stability and achieve AAA bond rating from Standard & Poor's and Moody's. Lake County is governed by a 21-member board and managed by a County Administrator.

PROJECT BACKGROUND

The County maintains nearly 1.4 million square feet of real estate in support of a diverse range of government services. The County has made significant investments in both rehabilitation and new construction over the past decade. Major capital projects anticipated for the foreseeable future have been identified and simple estimates of all currently foreseen future major projects is over \$250 million of potential construction. To plan for future projects, the County hired Schmidt Associates in 2017, and VFA Facility in 2018 to help create and refresh a Strategic Facility Assessment Improvement Plan, and Facility Master Plan for Lake County. The intent of the plan is to develop a strategic facility plan, including a detailed five-year capital improvement plan as well as a long-term view that considers projects projected beyond five years.

GENERAL QUALIFICATIONS

The statement of interest must provide your firm's qualifications, including ability of professional staff, its past record and experience, performance data on file, willingness to meet time and budget requirements, location, workload of the firm, work on similar projects, past performance with Lake County and financial stability related to design, bidding, and construction inspection for the following projects. Please indicate, by Professional Services Trade, the trade(s) listed for which your firm is interested in providing Professional Architectural and Engineering Services.

Project and Construction Management Services

Professional A&E or PMP to manage and execute capital projects. Projects can be highly complex facility improvements with complex coordination sequencing with one or many internal departments to maintain their operational needs before, during and after a rehabilitation project A Project and/or a Construction manager will act as Lake County's principal agent in the management of administrative duties of project management or

providing construction management like a project superintendent.

HVAC Engineering Design and Commissioning

Preparation of plans, specifications and cost estimates for various mechanical improvements at Lake County facilities including, but not limited to, the replacement of air handling units, variable air volume boxes, ductwork, chillers, piping and appurtenances, independent temperature control systems and direct digital controls. Preparation of specifications and implementation protocol to transition independent project closeout documentation to Lake County Facilities' building information modeling (BIM) data archives.

Electrical Engineering Design and Commissioning

Preparation of plans, specifications, and cost estimates for various electrical improvements at Lake County facilities including, but not limited to, the replacement of electrical switchgears, automatic transfer switches, transformers, main distribution panels, local panels, stand-by generators and direct digital controls. Preparation of specifications and implementation protocol to transition independent project closeout documentation to Lake County Facilities' building information modeling (BIM) data archives.

Elevator Modernization Design and Commissioning

Preparation of plans, specifications, and cost estimates for various elevator modernizations improvements at Lake County facilities including, but not limited to, traction elevators, hydraulic elevators, screw lifts, escalators and direct digital controls. Preparation of specifications and implementation protocol to transition independent project closeout documentation to Lake County Facilities' building information modeling (BIM) data archives.

Security System Design and Commissioning

Preparation of plans, specifications, and cost estimates for various security improvements at Lake County facilities including, but not limited to, IP-wireless duress alarm systems, access control systems, high definition security camera systems, and enterprise security automation systems. Preparation of specifications and implementation protocol to transition independent project closeout documentation to Lake County Facilities' building information modeling (BIM) data archives.

Fire Alarm System Design and Commissioning

Preparation of plans, specifications, and cost estimates for various fire alarm improvements at Lake County facilities including, but not limited to, control panels, initiating devices, notification devices, networking and integration. Preparation of specifications and implementation protocol to transition independent project closeout documentation to Lake County Facilities' building information modeling (BIM) data archives.

Fire Protection System Design and Commissioning

Preparation of plans, specifications, and cost estimates for various fire protection systems improvements at Lake County facilities including, but not limited to, fire suppression systems, fire barriers, smoke barriers, smoke control, smoke evacuation, space planning and risk analysis. Preparation of specifications and implementation protocol to transition independent project closeout documentation to Lake County Facilities' building information modeling (BIM) data archives.

Landscape Architecture Design

Preparation of plans, specifications, and cost estimates for various landscape architectural improvements at Lake County facilities including, but not limited to, site planning, stormwater management, environmental restoration and green infrastructure planning.

Native Grassland, Prairie and Wetlands Management Services

Monitor, document written progress reports and provide guidance for the best management practices for our native grassland, prairie and wetland installations.

Civil Engineering Design

Preparation of plans, specifications, and cost estimates for various civil engineering improvements at Lake County facilities including, but not limited to, site planning, sewerage systems, potable water pipeline systems, stormwater management, site hardening, and structural analysis.

Detention Facility Design

Preparation of plans, specifications, and cost estimates for various detention facility improvements at Lake County facilities including, but not limited to, inmate housing, inmate management, inmate welfare, life support, accessibility, support services, surveillance, security and physical plant functionality.

Courthouse Facility Design

Preparation of plans, specifications, and cost estimates for various courthouse facility improvements at Lake County facilities including, but not limited to, accessibility, security, life safety concerns, health concerns, aesthetics, acoustics, interior finishes, signage, technology and automation.

Building Automation Design and Commissioning

Preparation of plans, specifications, and cost estimates for various building automation improvements at Lake County facilities including, but not limited to, geographical representation of mechanical equipment, geographical representation of electrical equipment, HVAC controls and monitoring, electrical system monitoring, lighting system controls and monitoring, fire alarm system monitoring, life safety controls and monitoring, equipment run conditions, energy usages, and e-mail alarming. Lake County currently incorporates usage of multiple building automation systems: TRACER ES, Metasys, and WebCTRL, with all data from equipment brought back to Lake County's server farm using the ASHRAE BACnet communications protocol.

Environmental Services

Preparation of plans, specifications, and cost estimates to monitor, document, develop abatement monitoring and a hazardous material exploration plan. This may include assistance with site remediation and cleanup.

1. SUBMISSION REQUIREMENTS

Where appropriate, the responses provided under this section shall include a brief description of examples of outcome based accomplishments that have measurable success factors to demonstrate a firm’s qualifications and expertise. All examples should include owner name and contact information.

Section 1.0 – Executive Summary

Provide a brief summary, which describes and highlights your interest, experience and qualifications for these projects. Submit documentation to establish the professional licensing necessary to be eligible for these projects.

Section 2.0 – Relevant Experience

Relevant Experience shall clearly indicate the firm and which member on the project team participated in all relevant experience submitted. All experience submitted for a team member while in the employment of a different firm shall include their title and role on the project as well as the firm name that held the contract for all work submitted for relevant experience.

Section 3.0 – Project Management Team

Describe your approach relative to the delegation of responsibility and assignment of authority and interaction points with the County. Include a listing of key personnel and/or sub consultants proposed for the project team. Include a resume and/or relevant experience of each key team member and a brief description of the tenure or work history among team members.

Provide an organization chart graphically illustrating how your firm would staff and structure your proposed team to perform these projects. Include delegation of responsibility and assignment of authority and interaction points with the County.

List specific personnel (including sub consultants) proposed for the project team, including the project assignment and role or area of responsibility of each individual. State the current assignments for personnel proposed for the project, and their percentage of involvement at Various stages. Provide a resume for each proposed team member, specifically stating tenure or experience with your firm, experience and qualifications of each individual. The above list Represents a minimum submittal for key personnel from the Owner’s Representative and Project Manager Team.

Section 4.0 – Budget

Describe your firm’s methods to maximize and maintain quality project management and project image while maintaining tight budget constraints. Cite examples of specific things that you have done on other projects to meet this objective.

Describe your firm's approach to value engineering and what contribution does the firm typically provide during each phase of design and construction. Value engineering should include the ability of the proposer to evaluate cost saving opportunities in the construction project and add value to the project by applying a creative approach to optimize lifecycle, energy consumption and operational costs resulting from the design.

Section 5.0 - Quality of Documents

List the steps and describe the quality control processes we can expect from the firm during each phase of the design process to assure careful coordination of all disciplines and a high quality of design and contract documents.

2. EVALUATION PROCESS

Lake County will review submissions and conduct negotiations in accordance with the Local Government Professional Services Selection Act (50 ILCS 510/). The following qualifications will be considered by the County:

- A. Proven experience in design and successful implementation of similar projects.
- B. The evaluation of examples of outcome based accomplishments that have measurable success factors to demonstrate a firm's qualifications and expertise including the testimonials of owners or owner's agents.
- C. The depth of talent and staffing experienced in the execution of similar projects.
- D. The ability of the proposer to work with the Architect/Engineer and other consultants to maximize a design solution while maintaining budgetary discipline.
- E. Design quality and the ability to understand and translate the client's design goals.
- F. Quality and time availability of key project team members.
- G. A proven consistent engineer team leader that listens to the client and appropriately manages and directs the team's efforts.
- H. Familiarity with applicable codes and regulations including experience with the local authorities having jurisdiction.
- I. The ability, capacity and skill of the proposer to perform the contract or provide the service required.
- J. Whether the proposer can perform the contract or provide service promptly, or within the time specified, without delay or interference.
- K. The character, integrity, reputation, judgment, experience and efficiency of the proposer.
- L. The quality of performance of previous contracts or services.
- M. Experience and quality performance with other Lake County projects, contracts, or services.
- N. The previous and existing compliance by the proposer with laws and ordinances relating to the contract or services.

As part of its evaluation process the County may seek additional information from firms found to have resources and methodologies best suited to this project.

3. TERM OF AWARDED CONTRACTS

The term of awarded contracts shall be in effect for a one (1) year period from the date of award (initial term) or other period as indicated in each Project Description. Lake County reserves the right to renew the contract for one (1) additional one (1) year period, or as indicated in each project description, subject to acceptable performance by the Contractor. At the end of any contract term, Lake County reserves the right to extend the contract for a period of up to sixty (60) days for the purpose of getting a new contract in place. For any year beyond the initial year, the contract is contingent on the appropriation of sufficient funds. No charges shall be assessed for failure of the County to appropriate funds in future contract years.

General Information Sheet

AUTHORIZED NEGOTIATORS:

Name: _____ Phone # _____ Email: _____

Name: _____ Phone # _____ Email: _____

RECEIPT OF ADDENDA: The receipt of the following addenda is hereby acknowledged:

Addendum No. _____, Dated _____

Addendum No. _____, Dated _____

In submitting this statement of interest, it is understood that the County reserves the right to reject any or all submittals, to accept an alternate submittals, and to waive any informalities in any submittal.

BUSINESS ORGANIZATION: (check one only)

____ Sole Proprietor: An individual whose signature is affixed to this proposal.

____ Partnership: State full names, titles, and addresses of all responsible principals and/or partners on attached sheet.

____ Corporation: State of Incorporation: _____

____ Non-profit Corporation

____ 501c3-- U.S. Internal Revenue Code

By signing this proposal document, the proposer hereby certifies that it is not barred from bidding on a contract as a result of a violation of either Section 33E-3 or 33E-4 of the Illinois Criminal Code of 1961, as amended.

Business Name

Signature

Print or Type Name

Title

Date

References

Provide FIVE (5) references for projects. Governmental references are preferred over others. (Attach additional pages as needed)

Entity: _____

Address: _____

City, State, Zip Code: _____

Name of Contact Person _____

Email Address: _____

Telephone Number: _____

Description of Services Provided: _____

Date of Service: ____/____/____ To ____/____/____

Entity: _____

Address: _____

City, State, Zip Code: _____

Name of Contact Person _____

Email Address: _____

Telephone Number: _____

Description of Services Provided: _____

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Entity: _____

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City, State, Zip Code: _____

Name of Contact Person _____

Email Address: _____

Telephone Number: _____

Description of Services Provided: _____

Date of Service: ____/____/____ To ____/____/____

COMPANY NAME _____

AUTHORIZED SIGNATURE _____

TITLE _____

DATE _____

FIRM QUALIFICATIONS

Name and Address of Office from which this contract will be administered
(ATTACH ADDITIONAL PAGES AS NEEDED)

Name: _____

Address: _____

Phone: _____ Fax: _____

Email Address _____

Project Manager: _____

Years in Business: _____ **Number of Employees:** _____

Annual Sales: \$ _____ **Dunn & Bradstreet #:** _____

Indicate if firm is a certified M/W/DBE and attach certification: _____

List employees who will be dedicated to the Project: (Attach additional pages as necessary)

NAME	POSITION TITLE	NUMBER OF YEARS	AREA OF RESPONSIBILITY/TASK EXPERIENCE
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____



18 North County St 9th Floor
Waukegan, IL 60085-4350
Phone 847 377 2929
Fax 847 360 6592

Facility and Construction Services (FCS)
TBD Misc. Architectural and Engineering Services Request
December 5, 2019

In accordance with Lake County Statement of Interest #18089 "Professional Architectural and Engineering Services for Lake County" we have identified your firm as a shortlist candidate for providing TBD architectural and engineering services on the categories for which your firm has indicated proficiency. (Please see attached Exhibit A and advise Lake County immediately of any discrepancies in service capabilities.) Lake County desires to enter into a, single year, renewable \$400,000 maximum, contract for the design of to be determined architectural and engineering services for a variety of Facility and Construction Services projects. It is the County's intent that this contract would include renewal options (at the County's discretion) for a period of up to 5 years (total). The following paragraphs identify the general scope of services, and firm evaluation and selection process.

Scope of Services:

Lake County's Facility and Construction Services primarily funds its design and construction initiatives out of two sources: Capital Construction Improvements and Facility Assessment Improvements. Capital Construction is associated with major one-time initiatives; major forward planning exercises or construction of a new building would fall into this category. Facility Assessment Improvements is an annual fund allocation directed at the improvement or repair and restoration of, existing County Infrastructure. Lake County believes the majority of services provided via this solicitation will be provided as part of the Facility Assessment Improvements Projects.

Facility Assessment Projects run the gamut of operational support that FCS is asked to provide. Examples of these projects are: installation of new VAV boxes in an occupied office space, extension of fire protection lines, troubleshooting an existing lighting control system, or replacement of an ADA ramp. All of these projects must be individually designed, developed, and procured in accordance with the Lake County Purchasing Ordinance. FCS has a number of vehicles in place to solicit these services including: quotes, hard bids, unit price contracts, joint purchasing agreements, and ID/IQ contractors. The selected firm will provide: design, consulting, project management, and commissioning services as requested by the County in support of the designated project within the indicated service capabilities.

In order to evaluate and compare shortlist candidates on the basis of yet to be determined projects, the County wishes to establish a baseline understanding of how these services will be requested and authorized. On a per project basis, the County's project manager will approach the selected firm, indicate the nature of the work, the desired deliverables, and the requested timeline. The firm will provide a quote which includes: write up of scope and required services, list of required tasks, hours to compete each task (with break out of hours associated with billable rate categories), reimbursable costs, and sub-consultant costs. The rates for all self performed services shall be consistent with the final billable rate schedule as accepted by Lake County. The selected firm shall provide subconsultants quote as backup documentation with mark up of subconsultant services clearly indicated. Lake County will validate the appropriateness of the proposal by utilizing the Illinois Capital Development Board 2009 Centralized Fee Negotiation Professional Services Fee Handbook (Exhibit B) for the type of project and services provided. Upon approval by the County's Project Manager/LC Purchasing Dept. the quote shall be accepted and result in an "Add Line" to the selected firm's Purchase Order with Lake County. Payments shall be made by the firm on a monthly basis with draw downs against each add-line based on progress to date as approved by the PM.

Establishment of a consistent, reliable, working relationship is a primary goal of this solicitation. The selected firm's project team (and specifically the primary point of contact) shall be committed to Lake County and will remain constant throughout the term of this contract. Should the selected firm desire to designate another individual as the primary point of contact, this must be approved by Lake County, and may be grounds for termination of the contract if a mutually acceptable successor can not be identified. The County may request replacement of the primary point of contact based

upon its needs. Failure to identify a mutually acceptable successor by both parties may be grounds for termination. Additions or subtractions from the project team shall be mutually agreeable by all parties.

Firm Evaluation and Selection:

Lake County will identify a stakeholder committee who will interview, evaluate, and negotiate a contract with the selected architectural/engineering firm. The firm will be evaluated based on the following criteria, which will receive a score from 1-5 based on the interviewee's aptitude. Candidates are advised to address all of these elements during their presentation.

- A. Project Team:** Presentation of project team members. Include: primary point of contact, architect of record, mechanical engineer, electrical engineer, commissioning agent, and project and construction management services. Present depth of talent and staffing experienced in the execution of similar relationships; **(25%)**
- B. Self-Performed Service Capabilities:** Evaluation of in-house capabilities as compared to subcontracted consultants. Scoring will be evaluated in comparison to other shortlist candidates. **(25%)**
- C. References:** Proven experience in the implementation of similar professional service agreements which include: to be determined scopes, multiple projects, and long term commitment of team members to the client; **(25%)**
- D. Quantitative Effort Analysis (Exhibit C - Typical Project):** Provide an itemized quantification of design effort required for the example "Typical Project" (Exhibit C). Rollup shall include:
 - 1.) List billable project hours required by project phase (per the 7 categories listed in Exhibit A, Table A.) Each phase shall designate hours associated with employee classifications the interviewee uses in their Hourly Rate Schedule. (ie... Principal, Interior Designer, etc...) DO NOT INCLUDE THE ACTUAL HOURLY RATES AS PART OF THIS ANALYSIS.
 - 2.) Identify outside consultants (by type, not by cost) required to complete this design
 - 3.) List reimbursable expenses (by type, not by cost) required to complete this design.Rollup will be evaluated based upon: Completeness of proposal and appropriateness of employee classifications selected. **(25%)**

The interview team will evaluate and score candidate teams to arrive at its recommendation for contract. The selected firm will be notified by Lake County Purchasing of the County's intent. Thank you for your time and interest in doing business with Lake County. I look forward to hearing from you and am available to answer any questions you may have regarding this project.

Sincerely,

Jonathan Joy
Project Manager
Lake County Government