



February 28, 2019

Village of Wellington - Purchasing Office  
12300 Forest Hill Boulevard  
Wellington, FL 33414

Also via e-mail to:  
edelavega@wellingtonfl.gov

Attn: Ed De La Vega  
Re: Preconstruction Services Proposal - RFQ #013-18/ED  
Water Treatment Plant Warehouse, Generator Storage & Field Services Building Modifications

Wharton-Smith greatly appreciates the opportunity to provide this proposal for preconstruction services for the above referenced project in follow up to our initial meeting on February 19, 2019.

Our proposal is based on the following:

- CM's Preconstruction Services Agreement will be approved within 90 days of this letter
- Wharton-Smith (W-S) to perform a conceptual estimate based on Conceptual Design Documents dated February 22, 2019 prepared by Colome & Associates, Inc.
- Design schedule duration of 6 months to achieve 100% documents ready for submittal to building department for permit review process
- Design document review & approval cycles at 30, 60, and 100% are anticipated
- W-S will provide updated estimates at each design review cycle
- Attendance at six design/preconstruction coordination meetings
- Miscellaneous, reproduction, office & postage supplies, phone & travel expenses, etc. are included
- Other customary CM at Risk preconstruction services per the RFQ Sample Agreement to be conducted at appropriate times such as schedule updates, constructability reviews, phasing plan coordination, identification of long lead items, subcontractor solicitation, development of trade contractor scopes, subcontractor bid packages, conduct pre-bid conferences, receipt and analyze subcontractor bids, compile the Guaranteed Maximum Price (GMP) Proposal, subcontract award recommendations

In lieu of monthly cost referenced in the Sample Agreement, preconstruction services will be billed per the following 4 step schedule as requested:

1. Conceptual Estimate	\$ 10,000
2. 30% Estimate / Design Review	\$ 10,000
3. 60% Estimate / Design Review	\$ 15,000
4. 100% Completed Documents	<u>\$ 12,000</u>
Total	\$ 47,000

Wharton-Smith looks forward to serving the Village of Wellington and bringing value to your project. Please contact me at 561-748-5956 at your earliest convenience if there are any questions.

Respectfully,  
**Wharton-Smith, Inc.**

Gerry Kelly  
Director of Operations  
S. FL Commercial



**Village of Wellington  
WTP Warehouse, Generator Storage & Field Services Building Modifications  
RFQ #013-18/ED**

**Preconstruction Services Narrative**

The following narrative is to provide a list of activities and/or services associated with the cost breakdown indicated on the Preconstruction Services Worksheet. The duration of the preconstruction activities is assumed to be 4 months from Village Council approval to complete design development and building permit application submittal and 6 weeks thereafter for production of the Guaranteed Maximum Price (GMP) Proposal.

**Step 1 Conceptual / Budget Confirmation Estimate**

- 1.1 Wharton-Smith (W-S) estimating & preconstruction staff will attend an initial project kickoff meeting with the Village of Wellington's (VOW) selected architect/design team led by Colome & Associates. The preliminary conceptual design will be thoroughly reviewed to determine if the initial concept size, systems and materials align with the VOW's desired project budget parameters. W-S will compare their estimate with the conceptual estimate performed by design team and any original information utilized by the VOW as a formation of the project budget if available.
- 1.2 W-S will provide recommendations for value engineering, system or material alternatives and/or scope modifications as applicable for VOW consideration pending the results of the conceptual estimate.
- 1.3 W-S will develop a preliminary schedule utilizing Primavera scheduling software (or applicable alternate). The schedule will include preconstruction/design, construction and post-construction phase activities. The preliminary schedule will indicate design, permitting, procurement, construction, occupancy and closeout durations and milestones. A detailed sequence of construction activities will be provided for site development and each structure as more information becomes available with the progress of the design. Any occupancy phasing requirements to facilitate WTP operations will be incorporated after a plan is developed with applicable VOW personnel.

**Step 2 30% Design Estimate / Review**

- 2.1 W-S will attend a preconstruction/design coordination meeting with VOW and design team to review design and progress of the documents. W-S will attend any meetings with VOW Building Department or other agencies connected to the project. It is W-S understanding that the design team will provide meeting minutes and their timely distribution to W-S for all meetings held during the preconstruction/design phase.
- 2.2 W-S will identify long lead items and equipment and any specialty contractors that may need to be identified and courted earlier in the process. W-S will coordinate with VOW if certain items are to be identified for VOW's Owner Direct Purchase/ Sales Tax Savings Program.
- 2.3 W-S will determine occupancy phasing plans with VOW end users and confirm VOW Building Dept. concurs with plan. Design team to coordinate and incorporate occupancy phasing plans on design documents for trade contractor bidding clarity.





- 2.4 30% Design Cost Estimate – W-S will update project cost estimate by performing detailed takeoffs (based on available drawing concepts) on construction trades such as concrete, masonry, steel, roofing, doors, windows, finishes etc. to determine that estimated cost aligns with previous established design concept and associated budget. A full cost estimate will be provided showing material, labor, and equipment take-offs and any preliminary subcontractor cost estimates received, if applicable.
- 2.5 W-S will commence subcontractor solicitation and outreach activities to generate interest in the project
- 2.6 Prequalification packages will be developed and distributed to participating vendors with no previous contracting history with W-S.
- 2.7 The project schedule will be updated based on current information available at this stage through design progression and determination of construction activity sequencing.

**Step 3 60% Design Estimate / Review**

- 3.1 W-S will attend a preconstruction/design coordination meeting with VOW and design team to review design and progress of the documents. W-S and the design team may utilize this meeting to conduct a "redline page turn" review in conjunction with the constructability review for ease of communicating items that may need clarification or further development.
- 3.2 W-S will perform site visit(s) to investigate/confirm visible existing conditions, review spatial constraints, develop ingress & egress plan during construction, and analyze site conditions for development of site specific safety and quality plans. The site visit will also be to obtain information for overall site utilization plan which includes both temporary and permanent facilities (field office, water, sewer, power, phone, data, etc.).
- 3.3 W-S will perform detailed design and constructability review to identify potential conflicts, constructability concerns, spatial concerns, general questions, and overall consistency of the design disciplines (structural, architectural, civil, etc.). Value engineering options may also be offered for consideration as applicable.
- 3.4 60% Design Cost Estimate – W-S will update project cost estimate based on the additional information provided with the 60% design documents.
- 3.5 W-S will commence review of the project specifications for consistency with the plans and established budget parameters utilized in the cost estimate.
- 3.6 Long lead items will be reviewed/confirmed to ensure compatibility with the needs of the project schedule.
- 3.7 W-S will commence preparation of trade contractor work scopes and bid package documents. Bid packages will be divided into sections that include Instructions to Bidders, Insurance and Bonding Requirements, Scope of Work, Form of Proposal, Value Engineering Suggestions Form, and anticipated Schedule requirements. W-S will serve as the point of contact to all participating subcontractors and will respond to all questions from bidders related to scope of work as well as coordinate any questions regarding design clarifications with the design team. Bid packages will be compiled utilizing CSI Division and specification sections as a basis for work scopes.
- 3.8 Project schedule will be updated based on current information available at this stage through design progression and determination of activity sequencing.



- 3.9 W-S will attend a preconstruction/design coordination & project review meeting with VOW and design team to review overall status of the estimate and schedule to confirm that project remains on target to meet the Team's established goals.

**Step 4 100% Design Estimate / Review / Guaranteed Maximum Price (GMP) Proposal**

- 4.1 Confirm design documents are complete and are available to all bidding trade contractors
- 4.2 W-S will conduct a pre-bid conference at the project site with participating trade contractors. W-S will host, coordinate, and manage a pre-bid site visit for all potential bidders and answer any questions that may arise. W-S will coordinate with the design team if formal clarifications/addenda need to be issued to properly address any questions that arise in the bidding process.
- 4.3 W-S will coordinate a workshop meeting with the design team to confirm that any previous value engineering suggestions or alternatives driven by budget or quality concerns are incorporated into the design documents and can be clearly interpreted by bidding trade contractors.
- 4.4 Receive and analyze bids – A formal bid date will be established in the bid packages. Upon receipt, bids are reviewed for completeness, responsiveness, exceptions, clarifications, and deviations from the contract documents. Any voluntary value engineering suggestions arising from bidder's proposals not already under consideration will be brought forward for VOW and design team review.
- 4.5 Prepare bid tabulations - W-S will record subcontractor/supplier bid results on a bid tabulation worksheet which will then be utilized to rank participating bidders for price and ability to perform and ultimately make recommendations for awards.
- 4.6 W-S will conduct post-bid review conferences with major trade contractors to confirm understanding and compliance with all requirements and capability to perform and meet safety, schedule and quality goals. Subcontractors determined to be best qualified will be offered subcontracts and become a member of the Construction Team.
- 4.7 W-S will utilize all current design information, available building department and/or other reviewing agency comments, along with trade contractor bids received, to produce the project cost estimate that will be incorporated into the GMP Proposal and establish the Contract Sum per the GMP Amendment.
- 4.8 Project schedule will be updated based on current information available at this stage through design progression and determination of activity sequencing. Design at this stage will be assumed to be able to develop a schedule worthy of inclusion into the GMP Proposal. This schedule will serve as the basis for establishing the anticipated duration of construction to achieve Substantial Completion (Contract Time per the GMP Amendment) and as the basis for calculating project staff and schedule dependent general conditions cost.
- 4.9 GMP Proposal assembly - The required documentation to be provided with the GMP Proposal and serve as its basis will be compiled and submitted for VOW formal approval process.
- 4.10 W-S may commence initial subcontractor negotiation for trades that will be needed immediately and shortly after the Notice to Proceed is issued. The Notice to Proceed will be issued upon execution of the GMP Amendment by both parties and only after all required permits and approvals for the project have been received from the applicable governing agencies and provided to W-S.





**Miscellaneous**

- 5.1 Site Specific Safety Plan – W-S will develop a site specific plan that covers all policies related to safety that may be applicable to the project including Material Safety Data Sheets (MSDS), trench safety, confined spaces, fall protection, drug free policy, hurricane preparedness, emergency medical care plans, etc. Note: Cost to develop this plan is not covered in the Preconstruction Services Proposal but will be included in the GMP. The plan will be finalized by project staff and be available within 10 days of the Notice to Proceed.
- 5.2 Site Specific Quality Plan – W-S will develop a site specific quality plan that outlines the contract requirements, VOW expectations, and Wharton-Smith policies for quality control. The quality plan will essentially consist of Wharton-Smith's quality manual specifically tailored to the project. This manual outlines W-S best practices/requirement for the execution of all areas of construction. Note: Cost to develop this plan is not covered in the Preconstruction Services Proposal but will be included in the GMP. The plan will be finalized by project staff and be available within 10 days of the Notice to Proceed.
- 5.3 Preconstruction Video – W-S will hire an appropriate firm to video and/or photograph existing conditions at the project site and the surrounding area immediately adjacent to the site to help document existing conditions at the start of the project in the event that claims from a 3<sup>rd</sup> party arise during or after the construction phase of the project. Note: Cost for the video service is not covered in the Preconstruction Services Proposal but will be included in the GMP. The service will be performed immediately after issuance of the Notice to Proceed and W-S mobilization at the site.
- 5.4 Work at the project site during preconstruction phase – W-S will not be conducting any work onsite unless specifically authorized by VOW. No work is included at the site other than a site visit to verify above ground and readily visible existing conditions. The preconstruction services proposal does not include any testing, subsurface investigation or demolition of any kind. Any subsurface investigation, verification or location of any utilities, verification of structural conflicts, etc. is assumed to be performed as necessary by the design team or other independent firms directly for VOW.

PRECONSTRUCTION SERVICES WORKSHEET

The Village of Wellington - Warehouse, Field Services Offices and Generator Storage Pavillion



Wharton-Smith, Inc.  
CONSTRUCTION GROUP

DESCRIPTION	POSITIONS			LABOR TOTALS							MISC	TOTAL		
	Precon Manager Hrs	Rate 90.48	Estimator Hrs	Rate 75.48	Project Manager Hrs	Rate 90.48	Project Executive Hrs	Rate 130.00	Scheduler Hrs	Rate 90.48	Hrs		\$	
Conceptual Estimate														
Site Visit	0.00	0.00	8.00	603.83	4.00	361.92	4.00	520.00	0.00	0.00	16.00	1,485.75		
Meeting to discuss contract terms	0.00	0.00	0.00	0.00	4.00	361.92	4.00	520.00	0.00	0.00	8.00	881.92		
Owner preconstruction coordination meeting	0.00	0.00	4.00	301.92	4.00	361.92	4.00	520.00	0.00	0.00	12.00	1,183.83		
Attend conceptual design meeting	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
Develop preliminary project schedule	2.00	180.96	0.00	0.00	6.00	542.87	0.00	0.00	6.00	542.87	8.00	1,266.71		
Develop conceptual estimate	4.00	361.92	40.00	3,019.16	4.00	361.92	0.00	0.00	0.00	0.00	48.00	3,742.99		
Evaluate Owner's budget vs conceptual estimate	2.00	180.96	8.00	603.83	2.00	180.96	0.00	0.00	0.00	0.00	12.00	965.75		
Conceptual Phase subtotal	8.00	723.83	60.00	4,528.74	24.00	2,171.50	12.00	1,560.00	6.00	542.87	104.00	9,526.94	500.00	10,000.00 rounded
30% Design Estimate / Review														
Owner preconstruction coordination meeting	0.00	0.00	4.00	301.92	4.00	361.92	4.00	520.00	0.00	0.00	12.00	1,183.83		
Identify long lead items & specialty contractors	0.00	0.00	2.00	150.96	2.00	180.96	0.00	0.00	0.00	0.00	4.00	331.92		
Update estimate	4.00	361.92	40.00	3,019.16	8.00	723.83	4.00	520.00	0.00	0.00	56.00	4,624.91		
Generate trade contractor interest	0.00	0.00	4.00	301.92	4.00	361.92	0.00	0.00	0.00	0.00	8.00	663.83		
Develop & distribute prequalification packages	0.00	0.00	8.00	603.83	4.00	361.92	0.00	0.00	0.00	0.00	12.00	965.75		
Update project schedule	0.00	0.00	0.00	0.00	2.00	180.96	0.00	0.00	4.00	361.92	2.00	542.87		
Review phasing plans with operations personnel	0.00	0.00	4.00	301.92	4.00	361.92	4.00	520.00	0.00	0.00	12.00	1,183.83		
30% subtotal	4.00	361.92	62.00	4,679.70	28.00	2,533.41	12.00	1,560.00	4.00	361.92	106.00	9,496.94	500.00	10,000.00 rounded
60% Design Estimate / Review														
Owner preconstruction coordination meeting	0.00	0.00	4.00	301.92	4.00	361.92	4.00	520.00	0.00	0.00	12.00	1,183.83		
Site Visits	0.00	0.00	8.00	603.83	4.00	361.92	4.00	520.00	0.00	0.00	16.00	1,485.75		
Update project schedule	0.00	0.00	0.00	0.00	2.00	180.96	0.00	0.00	2.00	180.96	2.00	361.92		
Constructability review	0.00	0.00	4.00	301.92	4.00	361.92	0.00	0.00	0.00	0.00	8.00	663.83		
Review long lead items vs construction documents	0.00	0.00	2.00	150.96	2.00	180.96	0.00	0.00	0.00	0.00	4.00	331.92		
Prepare detailed scope packages & documents	0.00	0.00	40.00	3,019.16	4.00	361.92	0.00	0.00	0.00	0.00	44.00	3,381.08		
Select subcontractors for bidding	0.00	0.00	4.00	301.92	4.00	361.92	0.00	0.00	0.00	0.00	8.00	663.83		
Update estimate	8.00	723.83	40.00	3,019.16	4.00	361.92	4.00	520.00	0.00	0.00	56.00	4,624.91		
Review estimate with team	0.00	0.00	8.00	603.83	8.00	723.83	4.00	520.00	0.00	0.00	20.00	1,847.66		
60% subtotal	8.00	723.83	110.00	8,302.69	36.00	3,257.24	16.00	2,080.00	2.00	180.96	170.00	14,544.72	500.00	15,000.00 rounded
100% Design Estimate / Review / GMP Proposal														
Issue complete documents &/or addenda	0.00	0.00	4.00	301.92	0.00	0.00	0.00	0.00	0.00	0.00	4.00	301.92		
Conduct pre-bid conference	0.00	0.00	4.00	301.92	4.00	361.92	4.00	520.00	0.00	0.00	12.00	1,183.83		
Receive and analyze bids	3.00	271.44	16.00	1,207.66	8.00	723.83	0.00	0.00	0.00	0.00	27.00	2,202.93		
Prepare bid tabulations	2.00	180.96	8.00	603.83	8.00	723.83	2.00	260.00	0.00	0.00	20.00	1,768.62		
Conduct initial post-bid review meetings	0.00	0.00	8.00	603.83	8.00	723.83	0.00	0.00	0.00	0.00	16.00	1,327.66		
Recommend subcontractor awards	0.00	0.00	4.00	301.92	4.00	361.92	0.00	0.00	0.00	0.00	8.00	663.83		
Update estimate and schedule	4.00	361.92	8.00	603.83	2.00	180.96	0.00	0.00	0.00	0.00	14.00	1,146.71		
Compile & Submit GMP Proposal	2.00	180.96	6.00	452.87	8.00	723.83	2.00	260.00	0.00	0.00	18.00	1,617.66		
Commence negotiation with initial subcontractors	0.00	0.00	4.00	301.92	8.00	723.83	2.00	260.00	0.00	0.00	14.00	1,285.75		
100% / GMP subtotal	11.00	995.27	62.00	4,679.70	50.00	4,523.95	10.00	1,300.00	0.00	0.00	133.00	11,498.92	500.00	12,000.00 rounded
TOTALS	31	2,805	294	22,191	138	12,486	50	6,500	12	1,086	513	45,068	2,000	\$47,000.00

USE

\$47,000