Attachment A - Consultant Fee Proposal Form

Milwaukee County

Date: Nov. 11, 2026

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MILWAUKEE COUNTY DEPARTMENT OF PUBLIC WORKS

ARCHITECTURE AND ENGINEERING DIVISION

PROJECT: **WJ 012101 Community Reintegration Center (CRC) Roof Replacement**

CONSULTANT PROPOSAL

I. PHASE I - BASIC SERVICES (Include services of all subconsultants needed)

A. "LUMP SUM" fee for **100% Field Investigation, 100% Construction Documents, Cost Estimation & Construction Contract Procurement Services**:

() $ _____

II. PHASE II - BASIC SERVICES (Include services of all subconsultants needed)

A. "LUMP SUM" fee for **Construction Administration:**

() $ _____

PRINCIPAL IN CHARGE

Name of Principal

Engineer's Registration No. in Wisconsin Flat hourly rate for principal

Participation of Disadvantaged Business Enterprises at the rate of 10% will be required.

Firm Name

Authorized Signature

Title

Date

Attachment B

Proposal Preparation Submission and Evaluation Guidelines

PROPOSAL PREPARATION, SUBMISSION & EVALUATION

I. Explanation to Prospective Offerors

Any prospective offeror desiring an explanation or interpretation of this RFP must request it in writing no later than seven business days before the last date for submission of proposals. Requests should be directed to the individual in charge at the address listed in the RFP. Any information given to a prospective offeror concerning a solicitation will be furnished promptly to all other prospective offerors as an amendment to the RFP, if that information is necessary in submitting offers or if the lack of it would be prejudicial to any other prospective offerors.

II. Complete Proposals

Proposals shall represent the best efforts of the offerors and will be evaluated as such. Proposals must set forth full, accurate, and complete information as required by this section and other sections of this RFP.

III. Unnecessarily Elaborate Proposals

Brochures or other presentations beyond those sufficient to present a complete and effective response to this solicitation are not desired and may be construed as unnecessarily elaborate and an indication of the offeror's lack of cost consciousness. Elaborate art work, expensive paper and binding, and expensive visual and other presentation aids are neither necessary nor desired. Concise and clear proposals are sought.

IV. Retention of Proposals

All proposal documents shall be retained by the County and therefore, will not be returned to the offerors. The County will not pay for preparation of proposals or for proposals that are retained by the County.

V. Examination of Proposals

Offerors are expected to examine the Site, Statement of Work and all instructions and attachments in this RFP. Failure to do so will be at the offeror's risk.

VI. Legal Status of Offeror

Each offeror must provide the following information in its proposal:

A. Name of the offeror;

B. Whether offeror is a corporation, joint venture, partnership (including type of partnership), or individual;

C. Copy of any current license, registration, or certification to transact business in the State of Wisconsin if required by law to obtain such license, registration, or

certification. If the offeror is a corporation or limited partnership and does not provide a copy of its license registration, or certification to transact business in the State of Wisconsin, the offeror shall certify its intent to obtain the necessary license, registration or certification prior to contract award or its exemption from such requirements; and

D. Copies of any current license, registration or certification required in RFP;

E. If the offeror is a partnership of joint venture, names of general partners or joint venturers.

VII. Organization of Offeror

Each proposal must further contain a chart showing the internal organization of the offeror and the numbers of regular personnel in each organizational unit.

VIII. Offerors Authorized Agent

Each proposal shall set forth the name, title, telephone number, and address of the person authorized to negotiate in behalf of the offeror and contractually bind the offeror, if other than the person signing the proposal.

IX. Price Schedule Submission

Offerors are to submit prices for each item identified in the Proposal. Offers for services other than those specified will not be considered. The prices set forth in the schedule will be used for evaluation purposes and for establishing a contract price. Milwaukee County reserves the right to accept or reject any and all Proposals.

X. Certification and Representations

Offerors shall return with their proposal resumes and any other documents as may be requested in the RFP.

XI. Signing of Offers

The offeror shall sign the proposal and print or type its name on the form. Erasures or other changes must be initialed by the person signing the offer. Offers signed by an agent shall be accompanied by evidence of that agent's authority, unless that evidence has been previously furnished to the County.

XII. Proposal Guarantee

By submitting a proposal the offeror guarantees that it will keep its initial offer open for at least 60 days.

XIII. Acknowledgement of Amendments

Offerors shall acknowledge receipt of any amendment to this solicitation by signing and returning the amendment or by letter or telegram including mailgrams. The

County must receive the acknowledgment by the date and time specified for receipt of offers. Offeror's failure to acknowledge an amendment may result in rejection of the offer.

XIV. Late Proposals and Modifications and Withdrawals of Proposals

Any proposal received at the office designated in the solicitation after the exact time specified for receipt will not be considered.

XV. Proposal Evaluation Criteria

Following a list of general criteria which will be used to evaluate the proposals:

a. Quality and responsiveness to the RFP. Weight: 20%

b. Project approach and understanding, including strategy to perform requested work and time schedule. Weight: 30%.

c. Qualifications and experience. Weight: 35%

d. Fee and hourly rates. Weight: 15%.

XVI. Staffing

Consultant shall provide, at its own expense, all personnel required in performing the services under this agreement. Such personnel shall not be employees of Owner.

The offeror must describe his or her qualifications and experience to perform the work described in this RFP. Information about experience should include direct experience with the specific matter and similar facilities. Areas of expertise of each proposed staff member shall be provided (i.e., engineering, economics, architecture, planning). Specific examples of similar or related projects previously conducted shall cite:

- Name of client organization

- Name, address, and current telephone number of client contact person

- Contract number and inclusive dates

- Contract amount

Offeror shall provide the following information for every resume:

- Full name

- Title and areas of specialty

- Affiliation (that is, staff of offeror or subconsultant)

- Experience directly related to the proposed project

- Education/training

- Individual personnel hours and percentage of total project time which will be devoted to the proposed project in total and broken down by task. (See suggested matrix below)

- Resumes shall be included for all personnel expected to work on the project. Only resumes of staff or subconsultant staff employed by or under contract with the firm as of the date of proposal submission are to be included.

	NAME OF EMPLOYEE 1	NAME OF EMPLOYEE 2	ETC.....	EXPENSES	SUB TASK	TASK TOTAL
TASK	HOURLY RATE W/OH	HOURLY RATE W/OH	ETC.....		TOTAL	
DESCRIPTION						
1. TASK 1	Number of Hrs/Task	Number of Hrs/Task				
2. TASK 2						
3. TASK 3						
4. TASK 4						
5. TASK 5						
6. TASK 6						
TOTAL HOURS						
TOTAL COST						
% OF TIME						

TOTAL FEE

« Attachment D – Targeted Business Enterprise (TBE) and Disadvantaged Business Enterprise (DBE) Requirements »

COMMUNITY BUSINESS DEVELOPMENT PARTNERS

MILWAUKEE COUNTY

TARGETED BUSINESS ENTERPRISE (TBE) UTILIZATION SPECIFICATIONS for PROFESSIONAL SERVICES

1. The award of the contract is conditioned upon achieving the project's Targeted Business Enterprise (TBE) participation goal of 17**%**. Firms that qualify as a TBE include DBE firms certified by and listed in the Wisconsin Unified Certification Program (UCP) directory, MBE and WBE firms certified by the State of Wisconsin DOA and listed in the directory, SBE firms certified by Milwaukee County and listed in the Milwaukee County directory, and SBE firms that meet the SBA size standards and are listed in the SAM directory. All firms must be certified prior to the proposal submission deadline. A firm certified in another state must be certified by the Wisconsin UCP or State of Wisconsin DOA prior to submission of bid.

2. **TBE Participation**: The participation goal is based upon the total dollar value of your proposal less reimbursable items. Participation must be maintained throughout the contract, including any fee increases. TBE Prime self-performance may be counted to achieve the goal.

PROPOSAL CONSIDERATIONS

3. The County may reject your proposal if it does not include the ***Commitment to Contract with TBE*** (**TBE-14**) form(s), one completed for each of the firms you are including for participation. The Prime must indicate the dollar amount of work to be provided to the sub-consultant, sign the form, and have the TBE firm sign the form in the affirmation section prior to acceptance of your proposal by the County.

4. If awarded the contract, you will enter into a contractual agreement, directly or through sub-consultant, according to the ***Commitment to Contract with TBE*** (**TBE-14**) form(s) provided with your proposal. Copies of the executed agreements(s) will be submitted to the County.

5. TBE participation credit is calculated as follows:

   a. All of the identified scope(s) of work must have a commercially useful function in the actual performance of the contract and work must be performed directly by the TBE with their own employees.

   b. One hundred percent (100%) for the work performed by a TBE firm. If a TBE subcontracts a portion of work to another firm, the value of the subcontracted work will not be counted towards the TBE participation unless the work is performed by another TBE.

   c. You must notify the County if any TBE contractor(s) sublet any portion of their work.

6. The County reserves the right to request supporting documentation from both you and any listed TBE. If you fail to respond within the time specified, the County may determine you to be non-responsive and remove you from further consideration for contract award.

FOLLOWING CONTRACT AWARD

7. The County reserves the right to conduct compliance reviews and request, both from you and your subs, supporting documentation to verify TBE participation, in addition to the information entered monthly into the County's online reporting system. The County will notify you if you are not in compliance with contract terms. If you fail to take corrective action as directed, the County may take one or more of the following actions:

a. Terminate or cancel your contract, in whole or in part;

b. Remove you from the list of qualified consultants, and refuse to accept future proposals from you for a period not to exceed three (3) years;

c. Withhold contract payments to cover shortfall; and/or

d. Bring suit to recover damages up to the amount of the shortfall, including interest at the rate of 12% annually, plus the County's costs, expenses and actual attorney's fees incurred in the collection action.

8. You must submit copies of the executed subcontract agreement(s) for each of the sub-consultants listed on the contract**.** REQUESTS FOR PAYMENT WILL BE DELAYED IF NOT SUBMITTED.

9. If the TBE sub(s) are unable to perform, or any other issues arise, you must immediately contact CBDP Compliance at (414) 278-4851. You must submit written notification of your desire for substitution to the TBE affected, and copy the County. This notice must state the reason for the request. The TBE has five (5) business days to provide written objection/acceptance to you. Approval must be obtained from County prior to making any substitutions. TBE consultants are also required to notify and obtain approval from the County prior to subletting work.

10. The Prime will record payments received from the County and payments made to sub-consultants directly into the County's online reporting system on a monthly basis. These entries will cover payments during the preceding month and will include zero dollar ($0) entries where no payment has occurred. You must also indicate on the invoice work being performed by TBEs. Either a) place the word "TBE" behind the work item or b) break out the work done by TBEs at the end of the report. Failure to comply may result in withholding of payments, or enforcement of other sanctions including those listed in Section 7, above.

11. The County has a revolving loan program for DBE firms. If you have contracted with a DBE that is using these County funds, you must assist the County for repayment of these funds. This may include, but is not limited to, providing written information regarding the sub's contract balance, prior payment (two or three party) agreements, and the issuance of two-party checks payable in the name of Milwaukee County and the DBE indebted to the County under this program.

12. The County reserves the right to waive any of these specifications when it is in our best interest.

DISADVANTAGED BUSINESS ENTERPRISE (DBE) UTILIZATION SPECIFICATIONS

18.1 The award of this contract is conditioned upon the Good Faith Efforts (GFE) put forth by the bidder/proposer in achieving this contract's assigned Disadvantaged Business Enterprise (DBE*) goal. The bidder/proposer shall operate in good faith to ensure that DBEs have opportunities to participate on this contract.

18.2 **DBE Goal**: This contract's DBE participation goal is __%. For purposes of responsiveness, this participation goal shall be met based upon the dollar value of the base bid, initial offer or initial scope of work. As it may be in the best interest of Milwaukee County to accept the inclusion of alternates, or a best-final offer, approval of DBE participation shall be based upon total contract award. Likewise, if the successful contractor/consultant receives additional work on the contract, e.g., change orders, addendums, use of allowances, etc., DBE participation shall be based upon the revised contract total. **Contractors/Consultants, who are also DBE firms, must perform** at least thirty (30) percent of the contract with their own work force.

PRIOR TO BID/PROPOSAL OPENING

18.3 As a matter of responsiveness, the contractor/consultant shall submit with its original bid/proposal, the completed ***Subcontractor/Subconsultant/Supplier Information Sheet*** (**DBE-02**) and the signed and notarized ***Commitment to Contract with DBE*** (**DBE-14**) form(s) detailing the participation plan being proposed to meet or exceed this contract's participation goal. In the event the contractor/consultant is not successful in meeting the DBE goal, a complete ***Certificate of Good Faith Efforts*** (**DBE-01**) form and all relevant documentation shall be submitted with the bid/proposal in addition to the aforementioned forms. CBDP reserves the right to reject a bid/proposal, as non-responsive, if the required documentation is not submitted with the original bid/proposal.

18.4 Milwaukee County's Community Business Development Partners Department (CBDP) determines the sufficiency of the intended contract awardee's good faith efforts undertaken to achieve the assigned DBE participation goal. These efforts are proven by doing either of the following:

a. Evidencing that it has met the DBE participation goal by submitting with its bid/proposal a signed and notarized ***Commitment to Contract with DBE*** (**DBE-14**) form for each DBE documenting sufficient participation; or

b. Documenting the good faith efforts made to meet the DBE participation goal, even though it did not succeed in achieving the goal. In this case, the contractor/consultant shall submit the ***Certificate of Good Faith Efforts*** (**DBE-01**) and all relevant documentation, which will include a signed and notarized ***Commitment to Contract with DBE*** (**DBE-14**) form for each DBE documenting the participation achieved toward satisfying the goal, with its bid/proposal. CBDP is prohibited from ignoring *bona fide* good faith efforts when making determinations on requests for modification of the contract goal, in whole or part. Determinations are made on a contract-by-contract basis.

18.5 The efforts employed by the contractor/consultant should be those that one could reasonably expect to be taken if the contractor/consultant were actively and aggressively trying to obtain DBE participation sufficient to meet the goal. Mere pro forma efforts are not good faith efforts. (49 CFR, §26.53, and Appendix A to 49 CFR, Part 26, provide guidance regarding GFE).

18.6 In the event CBDP determines that the contractor/consultant has failed to meet the GFE requirements, the contractor/consultant is entitled to appeal this determination. The provisions of 49 CFR, §26.53(d), apply to such an appeal.

18.7 Listing a DBE on the ***Commitment to Contract with DBE*** (**DBE-14**) form shall constitute a written representation and commitment that the contractor/consultant has communicated and negotiated directly with the DBE firm(s) listed and secured actual pricing from the DBE firm. If awarded the contract, the contractor/consultant shall enter into contract agreement, directly or through subcontractors, with each DBE firm listed on the ***Commitment to Contract with DBE*** (**DBE-14**) form(s) for the work and price set forth thereon. The agreement(s) must be submitted to CBDP within seven (7) days from receipt of the "Notice-to-Proceed" or execution of the purchase order.

18.8 The DBE participation credited towards the contract goal for both DBE and non-DBE prime contractors is calculated on the following criteria and is further identified in 49 CFR §26.55:

a. Prime Contractor shall count towards the DBE requirement and be credited one hundred percent (100%) of expenditures to DBE firms, if all of the identified scope of work has a commercially useful function in the actual work of the contract and is performed directly by the listed certified DBE firm. CBDP through the application of 49 CFR §26.55(c) is responsible for the determination and evaluation of whether or not the firm is performing a commercially useful function on this project.

b. Prime Contractor shall be credited with one hundred (100%) percent for the work performed by the DBE subcontractor with its own forces. If a DBE further subcontracts a portion of its work to another firm, the value of the subcontracted work will not be counted towards the DBE goals unless the work is performed by another DBE firm. The Prime Contractor will be given credit for the cost of material and supplies obtained by the DBE and installed by the DBE for work on the contract. The Prime Contractor will also be given credit for the cost of equipment leased by a DBE subcontractor provided the equipment is not leased from the prime contractor or its affiliates.

c. Prime Contractor shall be credited with one hundred percent (100%) of the expenditures to DBE manufacturers. A DBE manufacturer is a firm that operates or maintains a factory or establishment that produces on the premises goods from raw materials or substantially alters the materials or supplies obtained by the contractor.

d. Prime Contractor shall be credited with sixty (60%) of the expenditures for materials or supplies purchased from a certified DBE regular dealer.

A Regular Dealer is a firm that owns, operates, or maintains a store, warehouse, or other establishment in which the materials or supplies are kept in stock, and regularly sold to the public in the usual course of business. A regular dealer in such bulk items as steel, cement, gravel, stone, and petroleum products need not keep such products in stock, if it owns or operates distribution equipment.

Brokers, packagers and manufacturers' representatives or other persons who arrange or expedite transactions are not regarded as regular dealers within the meaning of section 26.55.

e. Prime Contractor shall be credited one hundred percent (100%) for the fees or commissions charged for assistance in the procurement of material and supplies. A prime contractor shall also be credited with one hundred (100%) percent for fees or transportation charges for the delivery of material or supplies by a DBE to a job site provided that the County determines that the fee is reasonable and not excessive as compared with fees customarily allowed for similar services. The cost of the material and supplies will not be credited towards its DBE goals.

f. Prime Contractor shall be credited with one hundred percent (100%) of transportation expenditures with DBE trucking firms provided the DBE firm is responsible for the management and supervision of the entire trucking operation for which it has contracted. The DBE must also use trucks it owns, insures, and operates using drivers it employs. The DBE may lease trucks from another DBE firm, including an owner-operator who is certified as a DBE. The DBE who leases trucks from another DBE receives credit for the total value of the transportation services the lessee DBE provides on the contract. The DBE may also lease trucks from a non-DBE firm, including an owner-operator; however, the DBE who leases trucks from a non-DBE is entitled to credit only for the fee or commission it receives as a result of the lease arrangement. The DBE does not receive credit for the total value of the transportation services provided by the lessee, since these services are not provided by a DBE. (Concrete ready mix operations will not receive credit for leased concrete delivery trucks from non-DBE firms).

g. Contractor/Consultant is required to notify the County Contract Administrator and CBDP if any DBE contractor(s) working on this contract will sublet any portion of their work on this project. Work will be credited based on actual participation by DBE firms.

18.9 Contractors/Consultants should note that for the purpose of determining compliance with the DBE requirements of this contract, only DBEs certified by the State of Wisconsin Unified Certification Program (UCP) prior to the bid/proposal submission deadline count towards the satisfaction of the goal. If a bidder/proposer wishes to utilize a DBE certified in another state for credit on this contract, the bidder/proposer shall include a copy of DBE certification from the home state along with its good faith efforts documentation upon submission of bid/proposal as a matter of responsiveness. Additionally, any such named DBE must apply for certification with the Wisconsin UCP prior to bid opening or proposal due date. For assistance related to certified DBE firms, contact the Certification and Compliance Administrator at (414) 278-4747.

18.10 When evaluating a contractor/consultant's proposed DBE commitment, Milwaukee County reserves the right to request supporting documentation from both the contractor/consultant and any listed DBE. If the information requested is not submitted by the contractor/consultant within the time specified for such submission, Milwaukee County may determine the contractor/consultant to be non-responsive and thereby remove them from further consideration for contract award.

FOLLOWING CONTRACT AWARD

18.11 When evaluating the performance of this contract after execution, Milwaukee County reserves the right to conduct compliance reviews and request, both from the contractor/consultant and any subcontractors/ subconsultants or material suppliers, documentation necessary to verify actual level of DBE participation. If the contractor/consultant is not in compliance with these specifications, CBDP will notify the contractor/consultant in writing of the corrective action that will bring the contractor/consultant into compliance. If the contractor/consultant fails or refuses to take corrective action as directed, Milwaukee County may take one or more of the actions listed below:

a. Terminate or cancel the contract, in whole or in part;

b. Remove the contractor/consultant from the list of qualified contractors/consultants and refuse to accept future bids/proposals for a period not to exceed three (3) years;

c. Impose other appropriate sanctions, including withholding any retainage or other contract payments due which are sufficient to cover the unmet portion of the DBE contract commitment, where the failure to meet the DBE contract commitment is the result of a finding by CBDP of less than adequate good faith efforts on the part of the contractor/consultant; and/or

d. If the contractor/consultant has completed its contract, and the DBE contract commitment was not met due to an absence of good faith on the part of the contractor/consultant as determined as determined under 49 CFR, Part 26, the parties agree that the proper measure of damages for such non-compliance shall be the dollar amount of the unmet portion of the DBE contract commitment. The County may in such case retain any unpaid contract amounts otherwise due the contractor/consultant, up to the amount of the unmet DBE contract commitment. If insufficient funds remain in the contract account to compensate the County up to that amount, Milwaukee County may bring suit to recover damages up to the amount of the unmet commitment, including interest at the rate of 12% annually, plus the County's costs, expenses and actual attorney's fees incurred in the collection action.

18.12 Contractor/Consultant shall be credited for expenditures to DBE firms toward the requirements, if the entire identified scope of work has a commercially useful function in the actual work of the contract and is performed directly by the listed DBE firm. CBDP, through the application of 49 CFR, §26.55(c), is responsible for the determination and evaluation of whether or not the firm is performing a commercially useful function on this project.

18.13 After the execution of the contract, contractor/consultant must submit copies of executed **Subcontract Agreement(s)** for each DBE firm listed on the contract. Attach agreements to the first payment application. **APPLICATIONS FOR PAYMENT WILL NOT BE PROCESSED IF AGREEMENTS ARE NOT SUBMITTED AS REQUESTED**. In addition, **contractor/consultant** shall document that each DBE is notified at least three (3) working days before start of their subcontract work.

18.14 Contractor/Consultant is required to notify the County Contract Administrator and CBDP if any DBE contractor(s) working on this contract will sublet any portion of their work on this project. Work will be credited based on actual participation by DBE firms.

18.15 Contractor/Consultant must maintain DBE participation and performance logs. If the DBE firm(s) cannot perform, if the contractor/consultant has a problem in meeting the goal, or any other problem relative to these requirements, the contractor/consultant shall immediately contact CBDP at (414) 278-4747. The prime contractor/consultant must submit written notification of desire for substitution to the DBE affected, and forward a copy to CBDP, specifying the reason for the request, including the performance log. Any DBE so notified has five (5) business days to provide written objection/acceptance to the prime making the notification. The "right to correct" must be afforded any DBE objecting to substitution/termination for less than good cause as determined by CBDP (Refer to 49 CFR §26.53). Approval must be obtained from CBDP prior to making any substitutions. DBE contractors are also required to notify and obtain approval from CBDP prior to subletting work on this project.

18.16 **Requests For Payment**: A ***DBE Utilization Report*** (**DBE-16**) form shall be submitted with each payment request by the contractor/consultant after contract award. This report must cover the period from the start of the project to the end of each period covered by the request for payment being

submitted. This report must be submitted even if no DBE activity took place during the period being reported. Contractor/Consultant must indicate on the AIA Document ***G703 - Continuation Sheet***, or similar, work being performed by DBEs by either a) placing the word "DBE" behind the work item or b) breaking out the work done by DBEs at the end of the report. Contractor/Consultant shall notify DBEs of the date on which they must submit their invoices for payment. Failure to submit required forms with requests for payment will result in denial of payment, or other sanctions deemed appropriate by Milwaukee County, including those listed in Section 11, above.

18.17 **Final Payment Verification**. Contractor/Consultant shall submit a ***Contract Close-Out DBE Payment Certification*** (**DBE-18**) form completed by the contractor/consultant and each DBE along with its final request for payment, in addition to a final ***DBE Utilization Report*** (**DBE-16**) covering the entire project. Milwaukee County will not process the final request for payment without inclusion of these required forms.

18.18 Milwaukee County has a revolving loan program for DBE firms. The program is administered by CBDP. Should the Prime Contractor utilize a DBE that is a participant in this revolving loan program, the contractor will cooperate fully and completely with the County to facilitate repayment of said loan. Said cooperation includes, but is not limited to, written information regarding balance of DBE subcontractor's contract, prior payment (two or three party) agreements, and the issuance of two- party checks payable in the name of Milwaukee County and the DBE indebted to the County under the revolving loan program

18.19 Milwaukee County reserves the right to waive any of these specifications when it is in the best interest of the County and with the concurrence of CBDP.

« Attachment E – Manpower, Direct Salary Rate and Overhead & Profit Factor Schedule »

« Attachment F – Guideline for Reimbursable Expenses »

MILWAUKEE COUNTY
DEPARTMENT OF TRANSPORTATION, TRANSPORTATION SERVICES DIVISION

GUIDELINES FOR REIMBURSABLE EXPENSES

GENERAL

Milwaukee County reimburses consultants under contract for expenses in connection with authorized out-of-town travel; long distance communications; fees paid to approving authorities; reproductions which are products of service; requested renderings, presentation models and mockups; and the expenses of requested additional insurance coverage. There may be other qualifying reimbursable expense items if the project or circumstances are unique and terms concerning them are contained in an approved and signed contract. These guidelines are intended to clarify the County's general policies concerning payments for reimbursable items.

DEFINITION

Reimbursable expenses are out-of-pocket expenses incurred by the consultant and consultant's employees in direct support of the project. Over and above compensation for Basic and Additional Services, they are unique and non-recurring costs. By their nature, the cost is not predictable in advance of occurrence.

Approved reimbursable expenses are billed at the same cost paid by the consultant and are not subject to retainage provisions found in Milwaukee County service agreements.

DOCUMENTATION

Most reimbursables can be documented by presenting a copy of the original sales slip or invoice clearly highlighted, dated, and labeled with the appropriate job number/name and person incurring the expense. When the original charge has been recorded on an employee expense log, an in-house printing or copy log, or on a phone bill printout, for examples, a copy of the appropriate log or journal can be submitted as long as the costs are clearly highlighted, dated and labeled. All documentation must be attached to a cover sheet which itemizes and sub-totals the charges, by type. The documentation and cover sheet is attached to the consultant's monthly invoice.

REIMBURSABLES BUDGET ALLOWANCE

All agreements shall establish a pre-approved budget allowance for the total out-of-pocket reimbursable expenses of consultant's. Changes to the approved allowance total require a written amendment to the consultant's contract. As part of final contract negotiations, the consultant shall prepare an itemized budget estimate for reimbursables for review and approval by the County. Special care should be taken to differentiate those out-of-pocket expenses that will be initially borne by the consultant and those that will be paid directly by the County (under a separate County Services line item in the project budget).

AUTHORIZED OUT-OF-TOWN TRAVEL

Reimbursable travel expenses can accrue for both travel to and from Milwaukee for work in connection with a project if that travel involves a distance greater than a 100 mile radius from Milwaukee **or if the consultant's working office is more than 100 miles from Milwaukee.** Milwaukee County will reimburse consultant's for reasonable expenses incurred for such transportation, subsistence and lodging. Mutual agreement about what constitutes an authorized travel expense begins at the time of contract negotiations when the budget for these items is established and continues as the project proceeds. Milwaukee County policy is to pay for essential, not luxury, services.

Whenever possible, air travel dates should be planned in advance to take advantage of the lowest coach fares available on connecting airlines; Milwaukee County does not pay for first-class or business-class travel.

Daily rental car rates are rarely competitive with airport van or taxi fares to and from the airport, hotel and project meeting sites. Consultants should confer with Milwaukee County's project manager regarding the most reasonable and cost-effective means for transportation while in Milwaukee.

If traveling by personal car, the total mileage may be charged at the prevailing cost per mile rate allowed by the Internal Revenue Service. Highway tolls and parking fees for out of town consultants are also reimbursable, if properly documented and if the consultant's office is more than JOO miles from Milwaukee.

Meals reimbursement qualifies if the consultant's employees are required to eat in restaurants in connection with an out-of-town (JOO mile radius) visit/trip directly in service of the project. The consultant's choice of restaurants should be modest in every circumstance. Milwaukee County does not pay for meals taken in first-class restaurants, for cocktails, or for entertaining guests or in-town project team members. Milwaukee County discourages the scheduling of a business meeting over a meal period, thus avoiding the question of which meals might be authorized for reimbursement. Check with Milwaukee County's project manager if you are uncertain about which kind of meal expenditure might be disallowed.

Lodging costs at medium-priced accommodations will be approved. Deluxe accommodations and charges involving personal services of any kind will be disallowed.

LONG DISTANCE COMMUNICATIONS

Milwaukee County will reimburse the consultant for properly documented long distance telephone tolls made for project business.

FEES PAID TO APPROVING AUTHORITIES

Milwaukee County will reimburse the cost of fees paid for securing the approval of authorities having jurisdiction over the project. Consultants should plan for this expense in advance, because cutting County checks to coincide with dates of submittal cannot usually be done. The County will accept, however, an out-of-sequence invoice covering an unusually high plan exam fee in order to minimize the inconvenience to the consultant.

REPRODUCTIONS AND REPROGRAPHICS

The cost of drawings, specifications, reports, exhibits and other documents which are products of service are reimbursed with proper documentation. Charges for postage, handling and shipping of reproductions are considered overhead expenses and are not reimbursed. Bid sets, which are often the most expensive segment of the out-of-pocket expense paid by the consultant, are sometimes contracted for by the County on larger jobs that could benefit from competitive bidding for that service. Consult with the County project manager if the furnishing of bid sets is not specifically excluded form consultant's reimbursable allowance budget.

ADDITIONAL INSURANCE

When additional insurance coverage or limits, over and above that normally carried by a consultant is specifically requested by the County, the County will reimburse that additional premium cost. Specific documentation will be requested by the County project manager if this expense qualifies as reimbursable.

« Attachment G – Required Invoice Format »

MILWAUKEE COUNTY
DEPARTMENT OF ADMINISTRATIVE SERVICES FACILITIES MANAGEMENT DIVISION

INVOICE FOR CONSULTING SERVICES INVOICE # _____
(Lump Sum Contract Form)

DATE: _____

PROJECT TITLE: _____

_____

PROJECT NO.: _____

CONSULTANT: _____

SERVICES FOR THE MONTH ENDING: _____

_____

1.) BASIC SERVICES (**Attachment "D-2"**):

2.) REIMBURSABLE EXPENSES (**Attachment "D-2"**):
(Attach itemization and back-up copies of all charges)

3.) ADDITIONAL SERVICES (**Attachment "D-3"**):
(Attach itemization for each service by name, classification, direct salary rate x O.H. factor x man hours)

TOTAL THIS MONTH:

LESS: Retainage @ 5% (On Items 1. & 3. Only)……..

CURRENT PAYMENT DUE:
(Attach continuation sheet, D-2, on job status)

Approved for Billing:

_____
Consultant

_____
Signature

Approved for Milwaukee County
Department of Administrative Services
Facilities Management Division:

_____
Signature

_____
Title

_____
Date

MILWAUKEE COUNTY DEPARTMENT OF ADMINISTRATIVE SERVICES, FACILITIES MANAGEMENT DIVISION

CONSULTANT INVOICE CONTINUATION SHEET FOR REPORTING JOB STATUS PROJECT NO.: _____

CONSULTANT: _____ INVOICE # _____

Basic Services	Fee Limit Per Phase/ or Totals	Previously Billed	Billed This Month	Percent Complete (%)	Total Billed To Date	Retainage To Date	Balance To Completion
Program, Master Plan							
Schematic Des							
Design Dev.							
Contract Doc.							
Bidding							
Const. Admin.							
Subtotal							
Reimbursables (Itemized)	$			N.A.		N.A.	
Subtotal							
Additional Services (Itemized) INCR.	$						
Subtotal							
Totals							

MILWAUKEE COUNTY
DEPARTMENT OF ADMINISTRATIVE SERVICES, FACILITIES MANAGEMENT DIVISION

INVOICE FOR ADDITIONAL CONSULTING SERVICES ONLY — INVOICE #_____
(Multiple of Direct Salary Rate Form)
(One FORM "D-3"/Ea. Increase/Billing) — Fee Increase # _____

DATE: _____ — Fee Increase Total $_____

PROJECT TITLE: _____

PROJECT NO.: _____

CONSULTANT: _____

SERVICES FOR THE MONTH ENGING: _____

1.) **CONSULTANT LABOR** (Refer to approved Manpower Direct Salary Rate & O.H. Factor Schedule)

Name	Classification	Direct Sal. Rate/Hr.		OH Factor		Man Hrs		Cost
_____	_____	$	x	x		_____	=	_____
_____	_____	$	x	x		_____	=	_____
_____	_____	$	x	x		_____	=	_____
_____	_____	$	x	x		_____	=	_____
_____	_____	$	x	x		_____	=	_____

Subtotal _____

2.) **SUBCONSULTANTS**
(Attach itemizations in same form as above) Subtotal _____

3.) **REIMBURSABLE EXPENSES**
(Attach itemization and backup copies of all charges) Subtotal _____

TOTAL THIS MONTH:

LESS: Retainage @ 5% (On Items 1. & 2. Only)……..

CURRENT PAYMENT DUE:
(Attach continuation sheet on job status)

Approved for Billing:

Approved for Milwaukee County
Department of Administrative Services
Facilities Management Division:

_____ Consultant

_____ Signature & Date

_____ Signature

_____ Title

MILWAUKEE COUNTY
DEPARTMENT OF ADMINISTRATIVE SERVICES

***INVOICE FOR UNIT PRICE SERVICES ONLY**
(Multiple of Direct Salary Rate Form)
(One FORM "D-4"/Ea. Billing)

Invoice Number: _____

DATE:
PROJECT NUMBER:
PROJECT TITLE:
CONSULTANT:

Amount Previously Billed: $ _____
Amount This Bill: $ _____
Total Billed to Date: $ _____

Fee Limit: $ _____
Balance to Completion: $ _____

SERVICES FOR THE MONTH ENDING:

Item No.	Description	Unit of Measurement	Cost per Unit		Number of Units		Total Cost
_____	_____	_____	$ _____	x	_____	=	_____
_____	_____	_____	$ _____	x	_____	=	_____
_____	_____	_____	$ _____	x	_____	=	_____
_____	_____	_____	$ _____	x	_____	=	_____
_____	_____	_____	$ _____	x	_____	=	_____
_____	_____	_____	$ _____	x	_____	=	_____
_____	_____	_____	$ _____	x	_____	=	_____
_____	_____	_____	$ _____	x	_____	=	_____
_____	_____	_____	$ _____	x	_____	=	_____
_____	_____	_____	$ _____	x	_____	=	_____

CURRENT PAYMENT DUE **Total $**

Approved for billing:

_____
Consultant

_____
Signature

Approved for Milwaukee County
Department of Administrative Services:

_____
Signature

_____
Title

_____
Date

« Attachment I – Record Documents »

Attachment I – Record Documents

MILWAUKEE COUNTY DEPT. OFADMINISTRATIVE SERVICES
FACILITIES MANAGEMENT DIVISION
RECORD DOCUMENT STANDARDS FOR PROFESSIONAL SERVICES

I. RECORD DOCUMENTS

The Prime Consultant shall prepare and file record documents of the project with Milwaukee County DEPT. OF ADMINISTRATIVE SERVICES - FACILITIES MANAGEMENT DIVISION, as per this attachment. Prime Consultant agreement close-out and final payment will be contingent on approval of complete record document submittal by Prime Consultant.

II. ELECTRONIC MEDIA REQUIREMENTS

A. Produce Project Manuals, Reports, and other permanent records in an electronic word processing format that can be read by Microsoft Office 365. Produce Project Manual technical sections in Milwaukee County format. Obtain electronic formats for Project Manual technical sections through the Project Manager.

These materials shall be submitted using a secure file sharing program, as stated in G201-2013, ARTICLE 3.

B. BIM models shall be produced in Revit version 2021 or newer unless stated otherwise on G201-2013. CAD files shall be produced in AutoCAD version 2018 or newer. BIM and CAD models need to be in .RVT and .DWG formats. No other file types will be accepted. Print sets to be provided in .PDF format.

Obtain Milwaukee County drawing format standards for title blocks and cover sheets: B_1711, D_ 3624, and/ or F_4230 by contacting the Project Manager for the Project.

III. BIM MODELING STANDARDS

The Prime Consultant and his/her sub-consultants shall prepare BIM models in accordance with the following document standards:

A. Purge all Revit models of unused families, materials, groups, views, etc.
B. Remove unused views and sheets.
C. All Revit links will be linked using the Project Base Point, unless otherwise noted in G202-2013. Maintain the links and transfer files using e-transmit to include all linked files.
D. All views, sheets, and groups should be named appropriately.
E. Modeled elements and links should be placed on the correct worksets.
F. All AutoCAD files need to be linked into the Revit model, and not imported.
G. Include all accompanying files, including shared parameters .txt file, any linked AutoCAD files, PDFs, image files as .jpg or .png, etc.

The Prime Consultant and his/her sub-consultants shall maintain/update their respective models throughout construction by incorporating the following at a minimum (based on approval or direction to proceed):

A. RFC's
B. ASI's, CD's, CCD's, or other change documents that affect the contract documents.
C. Submittal comments and revisions on approved shop drawings.
D. As-built field modifications.
E. Changes in the sequencing of the work.
H. Consultants shall utilize the Milwaukee County drawing format standards setup in the startup project.
I. Drawing Sheet numbers and electronic drawing files shall consist of the following:
    1. Alphanumeric discipline designation
        A - Architectural Interiors and Facilities Management
        C - Civil Engineering and Site Work

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E - Electrical
EV - Environmental
F - Fire Protection
L - Landscape Architecture
M - Mechanical
P - Plumbing
S - Structural

2. A maximum of 3 characters for sheet number
   Example: A101.rvt
   I I
   I I____Sheet Number
   I_____Discipline

J. The drawing sheet naming convention shall be Discipline then Sheet Number (e.g., A101).

K. BIM Model naming convention: [Capital Project Number or other approved identification number]_[Building Number]_[Project Name]_[Revit Version]. (e.g., WS0126_5600_COGGS RENOVATION_R21.rvt)

L. Consultants shall utilize the Milwaukee County Standard Workset Naming Convention, as setup in the starter Revit model.

M. The room attributes shall be provided on all Revit floor plan views. Window attributes shall be shown on elevation views. The following attribute data shall be included:

1. **Rooms**
   Room name & number (serves as the room tag)
   Dimensions (length, width, height)
2. **Tag number**
   Door size
   Frame size
   Fire rating
3. **Windows**
   Tag number
   Size
   Glazing
   Framing material

IV. GIS Record Standards

a. GIS data must be obtained via resources found at: http://mclio.maps.arcgis.com/apps/webappviewer/index.html?id=1d1bc0975f414049ace560b95b377adc

b. GIS data must be edited to match the as-built state, edited to include all changes to all assets affected by the project, including all relevant/affected attributes and geometries, and returned to Milwaukee County with the same layers, fields, and Esri file geodatabase (.gdb) format as originally obtained via above resource.

c. Editors may edit the GIS data using their preferred software. Suitable commercial software packages that can read and edit the data are available from Esri and Autodesk (e.g. ArcMAP, ArcGIS Pro, AutoCAD Map3D, ect.)

d. Edited data must be returned in a zipped file geodatabase via the upload process documentation & resources found at

DRAFT

Attachment I – Record Documents

http://mclio.maps.arcgis.com/apps/webappviewer/index.html?id=1d1bc0975f414049ace560b95b377adc

V. DOCUMENT REQUIREMENTS

A. **Design Documents:** Prepare and submit the following documents to the Project Manager:

1. City/State Approved Drawings	(1) Original set
2. Bid Set Drawings	(3) Set hard copy (marked as "ORIGINAL")
	(1) Electronic file (RVT & PDF)
3. Project Manual & Detail Manual	(1) Set hard copy

1. **As-Built/Record Documents:** Prepare and submit the following record documents to the Project Manager:

1. As-Built/Record Drawings	(1) Set hard copy (marked as "ORIGINAL")
	(1) Set electronic file (RVT & PDF)
2. Project Manual & Detail Manual	(1) Set hard copy
	(1) Set electronic file (RVT & PDF)
3. Operating/Maintenance Manuals	(1) Set hard copy
	(1) Set electronic file

The Prime Consultant and his/her sub-consultants shall prepare and submit the required As-Built/Record Drawings and Project Manuals in accordance with the following procedures:

1. Obtain from each Prime Contractor marked-up prints, clarification drawings, shop drawings and/or any other data showing significant changes in the work made during the construction phase, including all changes described in the original addenda.

2. Update the original electronic drawings and project manuals by transferring all addenda and field changes from the contractor's marked-up documents, describing significant changes to the original drawings and project manuals.

   The Prime Consultant shall list all revisions with dates on each drawing and identify each revision with boundaries. Each drawing shall be labeled **AS-BUILT/RECORD DRAWINGS** and **PROJECT and DETAIL MANUAL.**

3. The end product shall consist of a composite set of Record Drawings and Project Manuals accurately showing the as-built, on-site conditions of the entire project.

2. **Studies/Analysis/Survey Reports**: Prepare and submit the following documents to the Project Manager:

1. Final Approved Report	(2) Sets hard copy
	(1) Set electronic file

VI. FINAL DOCUMENT REQUIREMENTS FOR ELECTRONIC MEDIA

The Prime Consultant and his/her subconsultants shall prepare and submit:

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A. A cover sheet containing a drawing index that is sorted by:
    1. Discipline
    2. Sheet number
    3. Sheet name
B. Cover sheet shall include:
    1. MILWAUKEE COUNTY Project Name and Number
    2. MILWAUKEE COUNTY Site I.D. and Building I.D.
    3. Seals and signatures of the Architect/Engineer of record.
    4. MILWAUKEE COUNTY signature block.

Detail Drawings produced as a MANUAL shall include a Drawing Index consisting of the detail title and/or description, and identification number sorted by discipline and page number. The Drawing Index shall be submitted in hard copy and shall be incorporated in the Detail Manual.

A. Consultants may insert their logos on Milwaukee County's Standard Cover Sheet with PRIOR APPROVAL from the Project Manager.

Submit the Project Cover Sheet Layout to the Project Manager for review and approval. Consultants **MAY NOT** insert their logos on the Project Drawing Sheets. The consultant firm's name may be inserted in the designated space provided within Milwaukee County's Standard Title Block.

SUBMIT HARD COPIES TO:

(PROJECT MANAGER)
MILWAUKEE COUNTY DEPARTMENT OF ADMINISTRATIVE SERVICES
FACILITIES MANAGEMENT DIVISION
ARCHITECTURAL, ENGINEERING & ENVIRONMENTAL SERVICES SECTION
600 NORTH PLANKINTON AVENUE-SUITE 600
MILWAUKEE, WI 53203

SUBMIT ELECTRONIC COPIES THROUGH SECURE FILE TRANSFER PROTOCOL

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Attachment J - Subconsultant Listing

MILWAUKEE COUNTY
DEPARTMENT OF ADMINISTRATIVE SERVICES, FACILITIES MANAGEMENT DIVISION

COMPLETE LISTING OF SUBCONSULTANTS
(To Be Completed by Prime Consultant)

DATE:_____

PROJECT TITLE:_____

PROJECT NO.:_____

PRIME CONSULTANT: _____

In the execution of the subject Prime Consultant Agreement, I/We propose to use the following subconsultants:

No.	Name & Address	Type of Service	Principal Contact

For Prime Consultant:

For Milwaukee County
Department of Administrative Services
Facilities Management Division

Approved (No.'s): _

Rejected/Resubmit (No.'s) _

_____
_____

_____
Signature

_____
Name

_____
Title

_____
Date

_____
Signature

_____
Name

_____
Title

_____
Date

ATTACHMENT "I"

Attachment K - Subconsultant Compliance Certification

MILWAUKEE COUNTY
DEPARTMENT OF ADMINISTRATIVE SERVICES, FACILITIES MANAGEMENT DIVISION

SUBCONSULTANT COMPLIANCE CERTIFICATION

DATE: _____

PROJECT TITLE: _____

PROJECT NO.: _____

PRIME CONSULTANT: _____

This is to Certify that I/We:

SUBCONSULTANT NAME: _____

ADDRESS: _____

_____

Shall provide the following subconsulting services to the above named Prime Consultant:

TYPE OF SERVICES: _____

_____

We also certify that if I/We are approved for this project, we shall be bound by all the applicable terms and conditions, including the "Audit and Inspection of Records" requirements, required of the Prime Consultant. No work shall be started until we have an executed Agreement with the Prime Consultant incorporating all of the above requirements.

SUBCONSULTANT

_____ _____
Subconsultant's Name Date

_____ If Principal is a Corporation
Signature IMPRINT CORPORATE SEAL

_____
Title

ATTACHMENT "J"

« Attachment L – Consultant Agreement Closeout Checklist »

MILWAUKEE COUNTY
DEPARTMENT OF ADMINISTRATIVE SERVICES, FACILITIES MANAGEMENT DIVISION
CONSULTANT AGREEMENT CLOSEOUT CHECKLIST

Consultant: _____

Project Title: _____

Project No.: _____

Agreement (Contract) No.: _____ Effective Date: _____

Type Agreement: A: ___ B (Annual): ___ C: ___ D: ___

Consultant Selection Documentation in File: Yes No

These deliverable item from the consultant must be in the FACILITIES MANAGEMENT DIVISION Project (job) File:

☐ Final Project Program Report (Sec. 3.1.3) (*Scope of project as agreed by all parties*)

☐ Final Estimate of Probable Construction Costs (Sec. 3.4.2) (*Submitted before bid process begins*)

☐ Copies of all State and Local Plan Examination approvals and receipts for paid application fees (Sec. 3.5.2.2)

☐ Project Manual and all addendum originals (Sec. 3.4.2, 3.5.2.3)

☐ Written recommendation as to Substantial Completion and final acceptance of the project (Sec. 3.6.2, 5.4.1.1) (AIA Form G704)

☐ Written confirmation of compliance of the Work with Contract Documents (sec. 3.6.2) (WI Commercial Bldg. Code, Form SBDB-9720)

☐ Final updated cost loaded schedule (Attachment "G-1")

☐ Record documents (Attachment "H-1") are accessible and useable _____
(FCAP Records)

☐ Operation and maintenance manuals and data (CONSULTANT approved)

☐ Confirmation of Site Clean-Up (*i.e., environmental or geotechnical soil cuttings, purge water*)

☐ DBE Participation (Attach Approved Final Utilization Report): DBD-018PS

All of the above items applicable to this project have been submitted

Prime CONSULTANT Signature: _____

County Project Manager Approval: _____ Date: _____

SCORE: _____

MILWAUKEE COUNTY
DEPARTMENT OF ADMINISTRATIVE SERVICES, FACILITIES MANAGEMENT DIVISION

CONSULTANT EVALUATION FORM

Consultant: _____

Consultant P.M.: _____

Project Title: _____

Project No.: _____ Contract No.: _____

Date of Evaluation: _____ Evaluation Form Completed By: _____

Basic Services Provided by the CONSULANT: _____

_____

_____

Please circle the Appropriate Response:
Performance Assessment:

I. Quality of Work:
- (4) Satisfied/Above Average
- (3) Acceptable/Average
- (2) Marginally Acceptable/Below Average
- (1) Unacceptable

Comments: _____

_____

II. Adherence to Schedule/Timeliness/Responsiveness:
- (4) Satisfied/Above Average
- (3) Acceptable/Average
- (2) Marginally Acceptable/Below Average
- (1) Unacceptable

Comments: _____

_____

III. Budget Management/DBE Compliance:
- (4) Satisfied/Above Average
- (3) Acceptable/Average
- (2) Marginally Acceptable/Below Average
- (1) Unacceptable

Comments: _____

_____

ADDITIONAL COMMENTS: _____

_____

Composite Score = I + II + III / 3