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J. Vance Lee Superintendent
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CAPITAN MUNICIPAL SCHOOLS BOARD OF EDUCATION

AGENDA ITEM EXECUTIVE SUMMARY

1. Board Meeting Date: October 20, 2025
2. Item Title: V.B.2 Proposal for Professional Services – HVAC Design
3. Name of Presenter: V. Lee
4. This item is for: ____ Action XX Consent Agenda ____ Discussion ____ Report/Information
5. Proposed Motion (Action Items Only): I move that we approve the proposal for professional services to design, engineer and provide contract services for an HVAC Renovation to the Administration/Middle School building, as presented.
6. Executive Summary: Please see attached.

August 1, 2025

Mr. J. Vance Lee, Superintendent
Capitan Municipal Schools
519 Smokey Bear Boulevard
Capitan, New Mexico 88316

Re: Administration Building HVAC Repairs

Dear Mr. Lee,

Thank you for considering Wilson & Company to provide professional design services for the HVAC repairs at the Administration Building at Capitan Municipal Schools (the District). It is our understanding the primary goal of this work is to update the Construction Documents (CDs) previously prepared by Wilson & Company so that price proposals (bids) can be obtained from CES contractors. The following outlines our understanding of the scope of work, professional services that will be performed, schedule, and related fees.

UNDERSTANDING OF THE PROJECT SCOPE

CDs for the HVAC repairs at the Administration Building dated 29 March 2024 were prepared by Wilson & Company under a separate contract. Procurement documents (e.g., bidding requirements, general conditions, and insurance requirements) were not included in the CDs because the schedule and funding were to be identified by the District later.

It is our understanding that the District intends to furnish the Bidding Documents (CDs, instructions to bidders, etc.) to Cooperative Educational Services (CES) contractors invited by the District to submit price proposals. Wilson & Company's work for this project will be performed under our Cooperative Educational Services contract (#2023-01-C1117-ALL).

PROFESSIONAL SERVICES

Pre-Design Phase

A site visit will be conducted to compare the original CDs against current conditions to confirm site conditions that may have changed. We will meet with District personnel to confirm the original design approach is still valid. We will document the agreed approach with photos, narratives, and basis-of-design products as may be needed to help ensure the District's goals are understood.

Design Phase

Our services will include the following:

1. Review and update the CDs for compliance with current codes and regulations.
2. Basis-of-design HVAC equipment from the original CDs is being phased out by the manufacturer due to new refrigerant regulations and will be replaced with current model numbers.
3. Electrical Design: The existing electrical service is too small to support the new HVAC loads. The electrical service upgrade for the Administration Building in the original CDs was supported by upgrades at the weight room service and equipment. The upgrades with the weight room package will be incorporated into this project or a new service will be coordinated from the utility. The feasibility of each option will be discussed and agreed upon with the District prior to submitting the 90% completion CDs.
4. The specifications will be updated and expanded to include bidding requirements, general conditions, insurance requirements, and other contract requirements.

5. Electronic drawings and specifications will be prepared for the District's review and records at milestone dates identified in the Schedule below.
6. Rough order of magnitude cost estimates will be provided to the District at milestone dates identified in the Schedule below.
7. Assist the District with obtaining NM Wage Rates.
8. Deliverables will be provided to the District at 90% and final completion.
9. Final, sealed, permit-ready Construction Documents.

Bidding & Negotiation Phase

Our services will include the following:

1. Prepare and issue invitations for price proposals to CES contractors (Bidders).
2. Facilitate a Bidder's Conference on site with the District, Bidders, and other interested parties.
3. Respond to Bidder's requests for information (RFIs) and substitution requests.
4. Issue addendum.
5. Review the bids with the District.
6. Assist the District with contractor selection, preparation of the AIA Owner-Contractor Agreement, and issuance of the Notice of Award document.

Construction Phase

Our services will include the following:

1. Assist the District with the Request for Approval of School Construction (RASC) to the Public School Facilities Authority (PSFA) for approval, including:
 - a) Project coordination with the PSFA-assigned district Regional Manager.
 - b) Communications/documentation via PSFA's web based, construction information management system (e-Builder).
 - c) Project scope/program statement documentation.
 - d) Anticipated maximum allowable construction cost (MACC).
 - e) Plan review.
2. Assist the District with issuance of the Notice to Proceed (NTP) document to the Contractor.
3. Attend the preconstruction meeting.
4. Attend up to six virtual progress meetings.
5. Review and respond to the Contractor's submittals and RFIs.
6. Perform up to six site visits to determine if the Work is being performed in accordance with the Contract Documents.
7. Keep the District informed about the progress and quality of the Work completed.
8. Certify the Contractor's Applications for Payment.
9. Conduct an inspection to determine the date of Substantial Completion.
10. Conduct an inspection to determine the date of Final Completion.
11. Conduct an 11-month warranty inspection.

SCHEDULE

Milestone dates we anticipate for this project after receipt of the Notice to Proceed are as follows:

90% completion of Construction Documents4 weeks
90% District review comments:1 week
Issued for Construction Documents:1 week
Subtotal:6 weeks

Bidding & Negotiation Phase:4 weeks

Construction Administration Phase:.....26 weeks

FEE

The following is a summary of the fees associated with our services, including expenses. Our costs will be invoiced monthly, and payment is due within 21 days of receipt.

Pre-Design/Information Gathering:	\$ 3,190.90
Design Phase:	26,747.00
Bidding & Negotiations:	6,203.00
Lump Sum Fee:	\$ 32,140.90
Construction Administration (Time and Materials Price*).....	\$ 36,312.00
Subtotal, All Fees:	\$ 72,452.90
NMGRT @7.625%:.....	5,524.53
Total Fees including NMGRT:.....	\$ 77,977.43

*Time and Materials Price: Services performed will be invoiced based on billing rates indicated in the current rate schedule under our CES contract. This price will not exceed the amount indicated without prior approval from the District.

ASSUMPTIONS

1. Work area and scope will remain in accordance with the original construction documents.
2. The District's anticipated construction budget for this project is approximately \$1,000,000.00.
3. Construction phasing will not be required; the District will relocate occupants from the building for the entire construction phase of the project.
4. New model numbers for HVAC equipment will not result in a significant increase in electrical demand or scope change.
5. The local utility will be able to upgrade the weight room service or add a new service for the Administration Building.
6. Bidders will be limited to no more than three CES contractors.
7. Bids will be submitted to the District electronically.
8. Repairs and alterations to the facility will be able to be accomplished under Level 1 of the NM Existing Building Code.
9. Updates necessary to the facility to comply with current accessibility and energy code regulations will not be required.
10. Obtaining NM State wage rates will be coordinated with the District and provided to Wilson & Company prior to completion of the Bidding Documents.
11. AIA contracts and forms will be used in the construction documents.
12. Deliverables for drawings and specifications will be provided in electronic, searchable, PDF format.
13. Bidding documents and addenda will be distributed via Wilson & Company's virtual plan room.
14. PSFA will submit the construction documents to the New Mexico Construction Industries Division (CID) for plan review.
15. Upon completion, testing, balancing, and commissioning of the HVAC equipment will be provided by the District under separate contract with others.
16. Site visits will be scheduled at intervals appropriate to the stage of construction (not including pre-construction meeting and substantial completion/final completion inspections).
17. Site visits will be scheduled to occur on the same day as the Owner-Architect-Contractor (OAC) progress meetings.
18. The construction phase will not exceed 6 months (182 calendar days).

EXCLUSIONS (The following can be negotiated to be added to our fee if needed)

1. Alterations to the existing facility due to building code deficiencies outside the proposed scope of work.
2. Detailed cost estimating (rough order of magnitude (ROM) estimate will be provided).
3. Hard copies/printing.
4. LEED/Energy Star/Green Building related services.
5. Permitting-related fees.
6. District-requested modifications.
7. Conformed construction documents (updates to drawings and/or specifications to include addendum and other modifications after issuance of the Bidding Documents).
8. Record drawings (revisions to Architect's CAD files to include Contractor's "as-built" drawings).

Our design team is ready to review the services outlined in this proposal with Capitan Municipal Schools and will be available to answer any questions you may have. Thank you for this opportunity!

Sincerely,



Michael Wright, AIA, Principal in Charge
Associate Vice President
505-348-4079 | michael.wright@wilsonco.com



Rick Green, RA, FCSI, CCS, CCCA
Project Manager
505-400-4669 | crgreen@wilsonco.com

Capitan Municipal Schools agrees with the scope as outlined above and will issue a Purchase Order for these services. Work will not proceed until the Purchase Order is received by Wilson & Company. Upon receipt, Wilson & Company will prepare an Owner-Architect Agreement.

Capitan Municipal Schools: _____

Authority Signature: _____

Name / Title: _____

Date: _____