



Livonia Public Schools

Finance Office

Date: November 7, 2023

To: Andrea Oquist, Superintendent

From: Alison Smith, Chief Financial Officer

Re: Sinking Fund Owner's Representative Amendment

I would like to discuss a recommendation to renew the appointment of the Owner's Representative Plante Moran Realpoint (formally known as Plante Moran Cresa) for Sinking Funds Projects. The current three-year agreement with Plante Moran Realpoint is set to expire on December 31, 2023.

Managing capital projects such as those funded out the district's Sinking Fund require making hundreds of informed decisions about construction delivery methods, architects and contractors, efficient space usage, project budgets, and phasing schedules. That's where Plante Moran Realpoint and their experienced team of professionals come in to offer the time and resources to our district to make sure our capital projects are planned and executed in such a manner that meets the expectations of our Board of Education and our community. The Plante Moran Realpoint team includes: architects, engineers, construction experts, project managers, real estate professionals, CPAs, and attorneys.

Our district has been very pleased with the services provided by Plante Moran Realpoint throughout the 2013 Bond program, 2021 Bond program, and on our Sinking Fund projects. They assist us in defining clear project parameters, securing the best qualified team of professionals, creating and enforcing contracts that minimize risk, and overseeing every project detail to ensure successful project completion. The value they have brought to our district is immeasurable. From negotiating contracts on the district's behalf to helping us oversee vendors schedules and safety, they helped and continue to help us keep our projects moving forward.

Specific Owner's Representative Services outlined in the agreement include:

- Project Liaison
- Program Development
- Architect/Engineer Selection
- Architect/Engineer Contract Negotiation
- Construction Manager Selection

- Construction Manager and/or General Contractor Contract - Negotiations
- Design Process Review
- Contractor Selection
- Construction Process Review
- Technology and Equipment Procurement Assistance
- Move Coordination
- Building Startup and Project Closeout

I am proposing a three-year extension that would secure these services through December 31, 2026, for a fixed fee of \$540,000 due in thirty-six equal monthly installments of \$15,000 which is the same fee the district is paying under the current three-year agreement.

Based on the recommendation of our legal counsel, this extension of Owner's Representative Services for the Sinking Fund would be executed as an amendment to our agreement for Owner's Representative Services for our 2021 Bond program.

Please include this item on the agenda for the Board of Education Building & Site Committee meeting on Monday, November 13, 2023. As always, please contact me if you have any questions.

Attachment

c: Board of Education