*A/E/Consultant Proposal Template*

*(Updated 4/2021)*

*• Delete all text that does not pertain to this project and red instructional text when finished editing.*

*• DFD has two types of A/E/Consultant contracts:*

*Type 1, (DOA-4147 short form) for specialized consulting services: CONSULTANT SERVICES AGREEMENT*

***AND***

*Type 2, (DOA-4519P long form) for standard design and construction administration services: A/E CONTRACT FOR PROFESSIONAL SERVICES*

*•* ***Do not include any language pertaining to legal responsibilities, termination of agreement, claims or dispute resolution, ownership of documents, how extra services will be procured, payments or services for late payments, insurance, indemnity or “hold harmless” clauses or other similar language. DFD will not accept proposals with cross-outs, changes, conflicting information, bits and pieces of proposals from different dates, or initials of the parties****.*

*• Email a draft “Word” document to the DFD Project Manager for their review and comment.*

*• Email the final version to the DFD Project Manager as a PDF file.*

**A/E/CONSULTANT PROPOSAL**

\_\_\_\_\_\_\_\_\_\_\_ *Date of proposal*

To:

\_\_\_\_\_\_\_\_\_\_\_\_, DFD Project Manager DFD Contract Officer

Wisconsin Department of Administration Wisconsin Department of Administration

Division of Facilities Development Division of Facilities Development

PO Box 7866 PO Box 7866

Madison, WI 53707-7866 Madison, WI 53707-7866

101 E. Wilson Street, 7th floor 101 E. Wilson Street, 7th Floor

\_\_\_\_\_\_\_\_ *(email address)*

DFD Project Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Title: **\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Institution/Building \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Agency: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_ *(optional opening paragraph)*

In response to DFD’s A/E/Consultant Selection Notification dated \_\_\_\_\_ we propose to provide \_\_\_\_\_\_\_\_\_ services for this project based on the documentation listed below.

To clarify and understand the Project Scope, Budget, and Schedule we have:

Participated in an Initial Project Meeting (Kick-off) on \_\_\_\_\_. *(Kick-off meeting minutes should be sent with the*

*proposal as supporting documentation of scope, schedule, deliverables, and budget.)*

Discussed project scope, budget, and schedule with the DFD Project Manager on \_\_\_\_\_\_.

**A. PROJECT SCOPE:** Our understanding of the project scope, budget, and schedule is as described in the: *delete all that do not apply. Clarify project scope here as it differs from the initial project request document.*

Agency Request for Consultant Services dated \_\_\_\_\_.

DFD Request for Small Project Approval dated \_\_\_\_\_.

Project Kickoff Meeting Minutes or Memorandum of Understanding dated \_\_\_\_\_\_.

The following revisions to the above noted project documents are as follows:

**B. PROJECT BUDGET:** *(per solicitation documents listed above)*

Total Project Budget $\_\_\_\_\_\_

Construction Budget $\_\_\_\_\_\_

*(****Do not include the project contingency in the construction budget above****. If there are revisions to the project*

*scope, you may note how this may change the overall construction budget here)*

**C. SCHEDULE OF SERVICES (estimated):**

We propose the following schedule, commencing with receipt of a fully executed contract:

*The proposed schedule for services and/or deliverables MUST accomplish the project within the authorized overall project schedule. Identify any differences between the original project schedule and the proposed.*

*For consulting services other than design:*

Major Milestone/Task Estimated Completion *(month/year)*

Project Start \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Deliverable 1* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Deliverable 2 (add others as applicable)* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Completion of all Specialized Consulting Services \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***OR***

*For design through construction services:*

Major Milestone/Task Per Agency Request Estimated

Completion

Project Start

A/E Selection \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Predesign Services or Program \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Design Report to SBC/Concept and Development Phase (35%) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Final Design Review (100%) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bid Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Substantial Completion/Occupancy \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Final Completion and Closeout \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**D. A/E/CONSULTANT TEAM:**

Name Fee Rate

**Prime A/E/Consultant Firm:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Principal/PIC: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_

Project Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_

Project Architect/Engineer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_

Primary Contact: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(address w/ zip)*

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** *(email)*

*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (telephone no.)*

**Associate Prime A/E/Consultant:**

*(Delete if not in association)*

**Sub Consultants:**

*• An A/E Fee Rate Sheet listing all sub consultants with company name must be attached for major projects.*

*• In A/E Data Record, Professional Liability Insurance information needs to be current before a contract can be issued.*

*• Add or delete disciplines as needed.*

Discipline\* MBE/DVB Company Name City/State Contact Person\* Contact Fee Rate

Architecture

Civil Engineering

Landscape Architecture

Structural

Plumbing

Fire Protection

Mechanical

Electrical

Tele/Data

Audio/Visual

Security

Commissioning

Other

*\*Matches and coincides with qualifications submittal and interviews*

**E.** **SERVICES:** *(Edit or delete service phases that do not apply.)*

1. **Pre-Design or Specialized Services:**

*(Ex: Feasibility Studies, Engineering Studies, Programming, Master Planning, Investigations, Commissioning, Condition Assessments, Historical Structures Reports, EIS and EIA services and etc)*

We propose to provide the following services in accordance with the DOA-4147 Consultant Services Agreement and the DFD Policy and Procedure Manual for Architects/Engineers and Consultants. *(A detailed description for services is required supported by a justification of fees which should include: services divided by major tasks, meetings, and duration represented by staff by discipline, their hours and individual fee rates; present as an attachment if too lengthy here)*

1. **Basic Design Services:**

We propose to provide Basic Services in accordance with the contract and the DFD Policy and Procedure Manual for Architects/Engineers and Consultants andthe DOA-4519P A/E Contract for Professional Services for standard design and construction administration services:

*Please be aware of Services Limitation described in the contract which temporarily limits services/fees to those approved only through the Preliminary Design phase until action is taken by the State Building Commission and written approval to proceed has been issued by the DFD Project Manager.*

1. **Additional Services:**

We propose to provide the following Additional Services: *(describe tasks, associated hours, participation of sub consultants, see the list of additional services in section 4.D. of the DOA-4519P* *A/E CONTRACT FOR PROFESSIONAL SERVICES)*

1. **Alternative Services:** *(These are optional services requested by the PM for the option to select.)*
2. **Construction Site Visits:** (this is a minimum estimate and included in “Basic Design Services” and shall not include pre-construction, punchlist, or final inspections(s))

*• List all sub consultants, whether or not they are providing site visits. If a sub consultant will not provide site visits, enter “0”.*

*• A licensed professional may inspect more than one discipline on the same day however indicate the number of site visits by each discipline. (progress meetings are not considered to be site visits, a site visit must be a review of the construction on site)*

*• Add or delete disciplines as needed.*

Cost for Additional

Discipline MBE Company Name # of Visits Site Visits

Architecture

Landscape Arch.

Structural

Site/Civil

Fire Protection

Plumbing

Mechanical

Electrical

Tele/data

Audio/Visual

Security

Commissioning

Other

**F.** **DELIVERABLES:**

We propose to provide the following deliverables. *(include drafts, content, quantity of paper and digital copies, discuss any additional deliverables or changes from those required in the DFD Policy and Procedure Manual for Architects/Engineers and Consultants and* *DOA-4519P* *A/E CONTRACT FOR PROFESSIONAL SERVICES)*

**G. FEE:**

We propose the following Fee:

Pre-design Services: $\_\_\_\_\_\_\_\_\_\_\_\_

Basic Services: $\_\_\_\_\_\_\_\_\_\_\_\_

Additional Services: $\_\_\_\_\_\_\_\_\_\_\_\_

**Total Lump Sum Fee of $\_\_\_\_\_\_\_\_\_\_\_\_**

(Includes overhead costs such as travel, lodging, meals, reproduction of drawings for design meetings, handling and postage, telephone, faxes, etc.per DFD standard allowable rates)

Fee Breakdown

Primary A/E Fee: \_\_\_\_\_

Subconsultant Fee: \_\_\_\_\_

Subconsultant Fee: \_\_\_\_\_

Justification of Fee: *(include a list of the supporting documents which clarify and support the proposed fee amount.)*

* + - * *Include an A/E Fee Rate Sheet as an attachment to the A/E Proposal which shows a breakdown of tasks and hours that correspond to the narrative above, all staff assigned to the tasks (including sub consultants) and the staff hourly rates.*
      * *Include direct or overhead expenses as part of the lump sum, per DFD standard allowances.*
      * *Or another itemized breakdown of how the proposed fees were prepared.*

***OR***

Hourly Not-To-Exceed $\_\_\_\_\_\_\_\_\_ (*only as approved by the DFD Project Manager for specialty services projects using the DOA-4147 short form contract)*

The fee rates and costs should be the same as the firm’s A/E Consultant Fee Schedule uploaded to WisBuild, at the date of A/E Notification or Selection.

1. **REIMBURSABLE EXPENSES:** *(as defined by DFD)*

*When specifically allowed by the Contract, reimbursable expenses are actual expenses incurred by the Consultant, its employees or sub-consultants, in the interest of the project and must be approved by DFD prior to the Consultant incurring the expense.*

*Expenses not eligible for reimbursement, which must be included as part of the Consultant’s lump sum fee for basic services shall include, but not limited to project overhead costs such as mileage, travel, lodging, replication of drawings and document printing, handling and postage, other than for bid sets; cost of correspondence transmittals, telephone expenses, and CAD/electronic graphic services. See section 4.C. of the DOA-4519P* *A/E CONTRACT FOR PROFESSIONAL SERVICES for eligible reimbursable expenses)*

We estimate the following reimbursable expenses*: (Delete those that do not apply or add other eligible expenses.)*

Plan review fees $\_\_\_\_\_\_\_

Zoning review or other regulatory fees/services $\_\_\_\_\_\_\_\_

Site survey $\_\_\_\_\_\_\_

Geotechnical investigation $\_\_\_\_\_\_\_\_\_

Other: \_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_

**I. ASSOCIATION AGREEMENT** *(if applicable, this is a separate document to be attached)*

*DFD does not use AIA forms such as AIA Form C141: Standard Form of Agreement between Architect and Consultant or AIA Form C801: Joint Venture Agreement for Professional Services.*

*Language in the Association Agreement shall indicate that DFD’s A/E Contract language overrides any conditions of the Association Agreement and that all parties to the Association are jointly and severally liable in the event of default by any of the parties. All parties of the Association must sign the A/E Contract with DFD unless the Agreement expressly provides one firm or individual with the authority to bind al parties of the Agreement to the terms and conditions of the A/E Contract with DFD.*

\_\_\_\_\_\_\_\_\_\_\_\_\_ *(optional closing paragraph)*

Sincerely,

*Signature,*

*Position/title*

Attachments/Exhibits: (*include all that apply and delete those that do not.)*

A/E Fee Rate Sheet *(separate document in excel or pdf format)*

A/E or Consultant Labor, Expense, and Task Worksheet *(required for pre-design specialized services contracts)*

Detailed Description of Services

Detailed Description of Deliverables

Work Plan

Association Agreement

\_\_\_Other

Supporting Documents:

Kickoff Meeting Minutes

\_\_\_Other