



March 24, 2015

Ralph Padron
2600 Gateshead Dr.
Naperville, IL 60564
ralphpadron@hotmail.com

Re: FOIA Request received March 17, 2015 FOIA ID #15-12

Subject: A copy of the contract and all documents pertaining to the current Facility/Buildings Studies Contract. Contract was approximately 60K.

Dear Mr. Padron:

This letter will serve as Community Unit District 308's response to your March 17, 2015, request under the Freedom of Information Act (5ILCS 140/1 et seq.), in which you asked for the above referenced information. Attached is a copy of the current Facility and Operations Management Plan proposal. The completed 5-year 2020 Deferred Maintenance and Energy Assessment Plan is available on our website. To access the it please follow the link below: <https://docs.google.com/viewerng/viewer?url=http://www.sd308.org//cms/lib8/IL01906463/Centrality/Domain/154/Deferred+Maintenance.pdf>

To promote district transparency and assist others who may have a similar question, this responsive document will be posted online on the district's website. To access it, go to www.sd308.org and select *Our District > Freedom of Information Act Request > FOIA Request Responses*, then select *FOIA ID #15-12*.

Please let me know if you have additional questions. Thank you.

A handwritten signature in black ink that reads "Victoria R. D'Aleo".

Victoria R. D'Aleo
Freedom of Information Officer

July 14, 2014

Michael Barr
Director of Facilities Construction & Development

Bill Baumann
Director of Operations

Oswego Community Unit School District 308
71 Stonehill Road
Oswego, Illinois 60543

Re: Oswego Community Unit School District 308 Facility and Operations Management Plan
Kluber, Inc. Proposal No. 140618.01

Dear Mr. Barr and Mr. Baumann:

Thank you for the opportunity to present this Proposal for Professional Services for the above referenced Project. Kluber, Inc. delivers integrated and comprehensive solutions to its clients and has cultivated a team of professionals that are sensitive to the performance feedback we receive over the life of the buildings we design. Kluber encourages on-going collaboration well after the buildings are constructed. Over the years, the Kluber team has sought feedback from building users and reviewed building consumption profiles and wear condition of building components to develop a grounded perspective of the real-world impact of our design and engineering decisions.

OVERVIEW OF PROJECT SCOPE

The Oswego Community Unit School District 308 is requesting Kluber, Inc.'s assistance in preparing a 5-Year Plan for facility capital improvement and operations budgets. OCUSD 308 and Kluber have been discussing ways to improve upon the planning process and believe that Kluber's unique qualifications would benefit OCUSD 308 in its planning efforts. This proposal addresses Kluber's involvement in OCUSD 308's capital improvement and operations planning. OCUSD 308 wishes a draft of the report to be completed by Sept. 1, 2014 and the final report complete by Oct. 1. Our involvement will include the assessments of and recommendations for the following facilities:

Elementary Schools:

- Boulder Hill Elementary School, 163 Boulder Hill Pass, Montgomery, IL
- Churchill Elementary School, 520 Secretariat Lane, Oswego, IL
- East View Kindergarten Center, 4209 Route 71, Oswego, IL
- Fox Chase Elementary School, 260 Fox Chase Drive N, Oswego, IL
- Grande Park Elementary School, 26933 Grande Park Blvd., Plainfield, IL
- Homestead Elementary School, 2830 Hillsboro Blvd., Aurora, IL

- Hunt Club Elementary School, 4001 Hunt Club Dr., Oswego, IL
- Lakewood Creek Elementary School, 2301 Lakewood Creek, Montgomery, IL
- Long Beach Elementary School, 67 Long Beach Road, Montgomery, IL
- Old Post Elementary School, 100 Old Post Road, Oswego, IL
- Prairie Point Elementary School, 3650 Grove Road, Oswego, IL
- Southbury Elementary School, 820 Preston, Oswego, IL
- The Wheatlands Elementary School, 2290 Barrington Drive, Aurora, IL
- Wolf's Crossing Elementary School, 3015 Heggs Road, Aurora, IL

Junior High Schools:

- Bednarcik Junior High School, 10250 Heggs Road, Aurora, IL
- Murphy Junior High School, 26923 W. Grande Park Blvd., Plainfield, IL
- Thompson Junior High School, 440 Boulder Hill Pass, Oswego, IL
- Traughber Junior High School, 570 Colchester, Oswego, IL
- Plank Junior High School, 510 Secretariat Lane, Oswego, IL

High Schools:

- Oswego East High School, 1525 Harvey Road, Oswego, IL
- Oswego High School, 4250 Route 71, Oswego, IL

Early Learning Center:

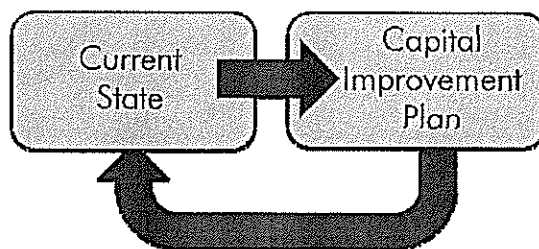
- Brokaw Early Learning Center, 1000 Fifth Street, Oswego, IL

Other District Facilities:

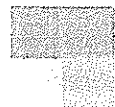
- District Administrative Center, 4175 Route 71, Oswego, IL
- District Building Services Facility, 71 Stonehill Road, Oswego, IL
- Maintenance Building, 4006 Wolf's Crossing Road, Oswego, IL
- Oswego 308 Center, 61 Franklin Street, Oswego, IL
- Transportation Building, 55 Stonehill Road, Oswego, IL
- Transportation Bus Building, 4439 Route 71, Oswego, IL

SCOPE OF SERVICES

Our approach in assisting OCUSD 308 will be to take full advantage of the existing facility maintenance plans and documentation already prepared and utilize OCUSD 308 resources on an on-going basis to create an enhanced facility management plan that goes beyond maintaining buildings at their current state operating conditions.



Typical Preventative Maintenance Plans focus on maintaining current state of system performance.



We propose to utilize our Facility Operations Management Plan ("FOMP") process to synthesize information from your capital improvement and preventative maintenance plans to create an overall management plan that will shift your facilities to a higher-performing state. Our role in the development of a FOMP is to provide the planning process, to collaboratively identify the critical metrics and develop objectives, and to provide additional tools and analysis beyond those typically employed in capital planning projects.

Kluber will assemble and analyze information taking a slightly different approach than past practices. Our goal is to move away from the concept of maintaining a building's condition through simple direct maintenance and replacement. We will measure your buildings' performance, compare that performance to benchmarked industry peers (and to our assessment of your buildings' individual potentials), and establish a path to achieving reduced energy consumption, and greater sustainability for each facility.

In short, the existing condition inventory becomes a "measured state" condition and the FOMP is guided by performance expectations and goals. By adopting this approach, your buildings will consistently move toward a "high performance state".



Kluber's FOMP focuses on achieving a higher level of building performance

BASIC SERVICES

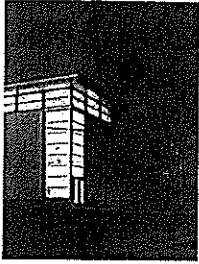
Our approach to developing this plan centers on four primary phases of planning. A complete understanding and execution of each phase is critical to creating a FOMP that is an effective tool for driving future decisions.

1. Current State

The FOMP development begins by identifying major system components to establish and quantify the current state of facilities. The majority of this information exists within Owner's building archives and the knowledge base of the Owner's facilities operations and maintenance staff. This task consists of guiding and empowering our clients to assemble and inventory all available data for all major property components. Specific steps to be taken are:

1. Obtain and review existing facility audits and space allocation information for facilities, including site plans, floor plans and related documents. If no recent audits exist, the recommendation will be to perform those audits.
2. Conduct interviews with maintenance representatives of each building to understand the general condition of their respective facilities and infrastructure.





Kluber will assist OCUSD 308 by creating survey tools for documenting for the major building system components as well as assembling utility consumption data, available preventative maintenance plans and active warranties.

While assembling this information, Kluber will take note of information gaps in the collected information. This information will be retrieved during our building assessment walk-through, which will be conducted during the second phase.

Current State Phase Deliverables:

- Written Report
 - Executive Summary
 - Information Gap Listing
 - Warranty Listing

2. Measured State

The measured state consists of performing an evaluation of each building, consisting of the following steps:

1. Conduct a major system component condition walk through of each building to obtain information necessary to fill inventory gaps identified during the Current State phase.
2. Establish building materials, components useful life and maintenance.
3. Establish building utility usage profiles.
4. Benchmark building energy usage consumption against its peers utilizing CBEC data base at the USDOE and Energy Star program.
5. Coordination of Energy Assessments and Feasibility Study as administered by SEDAC to minimize cost of energy audit.
6. Initial assessment of buildings to determine feasibility of candidacy for LEED Certification.

Measured State Phase Deliverables:

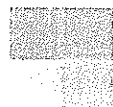
- Written Report
 - Executive Summary
 - Keyed Component Description and Rating
 - Utility Usage Profile
 - Building Energy Usage Benchmark
 - SEDAC Energy Assessment and Feasibility Report
 - LEED EB Certification Candidate Feasibility Ranking



3. FOMP Adoption

Once a measured state is achieved, Kluber and OCUSD 308 will be prepared to establish performance goals for each of its properties. The measured state will readily identify deficiencies and opportunities within the OCUSD 308 property inventory.

Kluber and OCUSD 308 will collaboratively determine realistic and achievable goals within funding limits to achieve the highest performance state possible for each building. These goals become the basis for the development of the 5-Year Facilities Operations and Management Plan



The final component develops strategies and procedures for monitoring and implementing the Plan. A key element of this component will include conceptual cost development to be used for the capital and operations planning process.

A flexible and realistic timeline will be developed as well as an initial prioritization of planning and development initiatives. The 5-Year Plan will be composed of planning concepts that address anticipated, but uncertain future conditions.

FOMP Adoption Phase Deliverables:

Written Report (electronic copy in PDF format):

Executive Summary

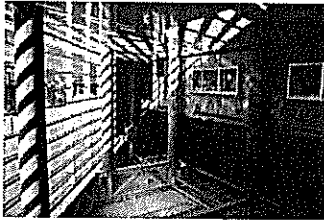
Performance Goals Description and Summary

Deficiency Schedule with Conceptual Solution

Deficiency Cost Estimates

Improvement Plan with Prioritized Deficiency Schedule and Cost

Separate presentations of report to Principals (as a group), Administration Directors (as a group) and to Board of Education



PROJECT LEADERSHIP

Kluber will assign a Project Leader who will be responsible for all of the day-to-day communications with District representatives, and all project team members. He will make sure that all correspondence is properly distributed and that all stakeholders in the process are kept appropriately informed of the status of the work. The Project Leader will also prepare a project schedule that will outline the project process and establish a calendar of milestones for the project.

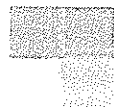
FORM OF AGREEMENT

Kluber, Inc. proposes to provide usual and customary architectural and engineering services for the Project as set forth in the standardized AIA B727 – 1988 *Standard Form of Agreement between Owner and Architect for Special Services*, and in accordance with the general understandings applicable to our relationship with you, with limitations as follows:

COMPENSATION

Kluber, Inc. proposes to provide the Basic Services described above for a Lump Sum of \$66,204.00. This amount reflects Kluber's commitment to our original pricing offered in 2009 for physical needs assessment services, and considers that the District now has the additional building at 71 Stonehill Road to be considered as part of the work scope.

Compensation for Basic and Additional Services does not include the services of other independent professionals, associates, or other consultants. If they are required, our fee will be increased by the direct costs of those services multiplied by a factor of 1.15 for overhead, coordination and management of the delivery of those services.



Reimbursable Expenses incurred in connection with our services will be charged on the basis of cost, without additional markup. Anticipated reimbursable expenses for this project include expedited courier services, printing and plotting, document reproduction, and are anticipated not to exceed \$750.

ADDITIONAL SERVICES

Additional Services beyond the Basic Services described above are not included, but may be required for the Project or specifically requested by Oswego Community Unit School District 308.

Changes in services, when authorized, will be charged on an hourly rate as scheduled hereafter and amended annually in accordance with our hourly rate schedule (2014):

Staff	Hourly Rate
Principal.....	\$225.00
Project Mechanical Engineer.....	\$165.00
Project Electrical Engineer.....	\$165.00
Project Structural Engineer.....	\$165.00
Project Architect.....	\$135.00
Engineering Intern	\$115.00
Architectural Intern.....	\$95.00
Senior Project Coordinator	\$75.00
Project Coordinator.....	\$55.00

Limitation of Liability: to the fullest extent permissible by law, Kluber, Inc. limits its liability, to include defense costs such as attorney's fees, for any reason to an amount no greater than two times fee, excluding reimbursable expenses.

TIMING

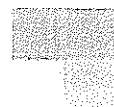
All services contemplated within this proposal shall be completed within the time frames mutually established by OCUSD 308 and Kluber, Inc., with the Understanding that OCUSD 308 wishes to have the final report complete by Oct 1, 2014.

FINAL NOTE

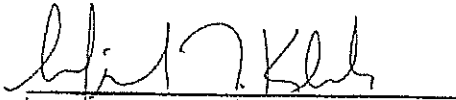
If this proposal satisfactorily sets forth your understanding of our agreement, we would appreciate your authorization to proceed with this Work. We are available to discuss any aspect of this proposal with you at your convenience.

At Kluber, we believe that building ownership is a significant community responsibility and we strive to assure that our buildings continue to serve its purpose optimally throughout its useful life.

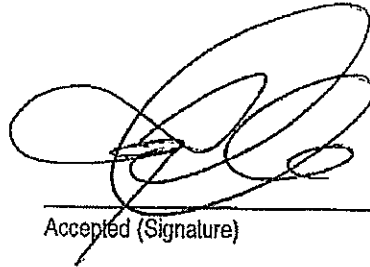
Kluber, Inc. appreciates the interest expressed in our firm and we look forward to serving your needs in the future.



Sincerely,



Michael T. Kluber, P.E.
President
KLUBER, INC.



Accepted (Signature)

07/14/14
Date

Dr. Paul O'Malley
By (printed name and title)
Associate Superintendent

Confidentiality Notice:

The contents of this proposal are confidential and may not be distributed to persons other than Oswego Community Unit School District 308.

