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THE  
**DICKMAN**  
COMPANY, INC.  
REAL ESTATE

626 EAST WISCONSIN AVE.  
SUITE 1020  
MILWAUKEE, WI 53202  
(414) 271-6100  
FAX (414) 271-5125  
WWW.DICKMANREALSTATE.COM

Wednesday, January 19, 2011

**Re: Appointment of The Dickman Company, Inc. as Agent for  
Lighthouse Academies of Wisconsin**

This will confirm the terms and conditions of the appointment of The Dickman Company, Inc. ("Broker") as the exclusive agent of Lighthouse Academies of Wisconsin for the purpose of evaluating and negotiating the purchase of the property located at 4200 West Douglas Avenue, Milwaukee, Wisconsin.

The appointment of Broker commences on the date of this Agreement provided above and expires twelve months from the date of this Agreement.

During the term of this Agreement, Broker will be the agent of Lighthouse Academies of Wisconsin for the purposes of negotiating on behalf of Lighthouse Academies of Wisconsin for the purchase of 4200 West Douglas Avenue, Milwaukee, Wisconsin. Broker agrees and acknowledges that Broker does not have the authority at any time to bind Lighthouse Academies of Wisconsin, and that Broker will in each instance notify any third parties of this.

Nevertheless, Lighthouse Academies of Wisconsin agrees that during the term of this Agreement, it will conduct all negotiations for the purchase of 4200 West Douglas Avenue, Milwaukee, Wisconsin with the assistance of Broker and will request that all contacts by current or potential seller of 4200 West Douglas Avenue, Milwaukee, Wisconsin be directed to Broker. Broker is authorized to advise any seller or their representative with whom it deals of the existence of this Agreement.

It is understood that any compensation which Broker shall earn as a result of concluding a transaction for the purchase of 4200 West Douglas Avenue, Milwaukee, Wisconsin on Lighthouse Academies of Wisconsin's behalf during the term of this Agreement will be the sole liability of the party or parties from whom the property is sold and that Lighthouse Academies of Wisconsin shall incur no financial obligation whatsoever to Broker hereby. The Listing Broker has disclosed to the Dickman Company that is receiving a commission of 6% of the sale price, of which 3% shall be paid to the Dickman Company in the event of a sale.

If the foregoing terms and conditions confirm your understanding of the Agreement, please sign below and return this Agreement to me. I enclose a copy for your files.

AGREED TO AND ACCEPTED BY:  
LIGHTHOUSE ACADEMIES OF WISCONSIN


Sincerely,

THE DICKMAN COMPANY, INC.

By: \_\_\_\_\_  
Mike Ronan, CEO

By:   
Samuel D. Dickman

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OF REAL ESTATE

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## **LIGHTHOUSE ACADEMIES OF WISCONSIN**

### **Request for Proposals for Architectural Services**

Issued on January 24<sup>th</sup>, 2011  
Proposal due on February 7<sup>th</sup>, 2011

Lighthouse Academies of Wisconsin (Lighthouse) is currently seeking a space to house a new charter elementary school, North Point Lighthouse Charter School, in Milwaukee. Lighthouse is seeking proposals from qualified firms to provide architectural services during the site search and due diligence phase of the project.

#### **BACKGROUND ON LIGHTHOUSE ACADEMIES**

Lighthouse Academies, the charter's parent organization, prepares students for college with a rigorous, arts-infused curriculum. Lighthouse currently operates fourteen schools across the country with a current enrollment of over 4,500 students ranging in age and grade from Kindergarten through 12<sup>th</sup> grade. The symbol of a lighthouse reflects a core goal of providing feelings of hope and security within the school walls. Lighthouse's mission gives hope to parents for a brighter future for their children and their vision extends the hope and security into the future.

With encouragement from a broad array of education advocates, Lighthouse Academies formed Lighthouse Academies of Wisconsin in 2010 as an independent organization that will open and operate North Point Lighthouse Charter School in fall 2012 and a second school in fall 2013. Both schools will start as elementary programs and add a high school in the future. The agency also intends to open additional Milwaukee schools in the future.

#### **FACILITY PARAMETERS**

The North Point school will serve up to 435 children in grades Kindergarten through 8<sup>th</sup> grade. The school will open in fall 2012 with 235 students and add 50 additional students each year until maximum enrollment is reached. To accommodate the schools space needs and growth over time, Lighthouse will need approximately 20,000 to 25,000 square feet for the first two years of operation, and 40,000 to 45,000 square feet to accommodate the school at full capacity. A site with the capacity to house a high school in the future is desirable. Lighthouse has identified a property and is currently negotiating with the seller. The property is an industrial property consisting of a 22,000 square foot warehouse with an additional 5,000 square foot office area. The majority of the exterior is brick with metal cladding on a portion of the rear of the facility. The warehouse has a clear height of 22 feet. The property is situated on a 3.68 parcel of land.

Lighthouse is seeking facility development plans that are creative in the identification of cost-minimization strategies. The school is interested in considering strategies that

include use of modular units and/or prefabricated construction materials as well as other methods of cost containment.

## **GENERAL SCOPE OF SERVICES**

The general scope of services sought includes, but is not limited to:

### **Phase I**

1. Clarification and confirmation of the proposed program. Full-scale programming will not be required.
2. Initial investigation of the facility and site and preparation of the following:
  - a. Identification of 3-4 proposed strategies for growing the school within the facility/on the property;
    - i. Prepare preliminary block diagram/test fit drawings showing preliminary potential layouts
  - b. Identification of code and other building improvements that will be required in order to occupy the building as a school;
  - c. Prepare preliminary cost estimates for each proposed strategy/layout;
  - d. Assist Lighthouse in identifying the best and most cost-effective strategy.
3. Assist with securing a zoning change.
  - a. Participate in development of a strategy for securing a zoning change (property is zoned IL-1);
  - b. Prepare documents for submission to BOZA;
  - c. Participate in community or other meetings (1-2)
  - d. Interface with Department of Community Development, Board of Zoning Appeals, and other entities as required in order to secure the needed zoning change.

### **Phase II**

4. Coordinate civil, structural, mechanical, electrical and plumbing (MEP) engineers, landscape architect, and services of other specialized professionals.
5. Interface with various Federal, State and City agencies through the review and approval process including the Department of Community Development and others as required.
6. [Lighthouse has/may obtain(ed) Federal, State and/or City funding for the project. As such, the selected architect may be subject to requirements tied to the funding, including, but not limited to, minority hiring, local hiring, and competitive bidding. Also, the selected architect, whether or not subject to requirements of any public funding that may be obtained by the School, may need to interface with and/or provide necessary documentation to public agencies on behalf of Lighthouse]
7. Design development services, including but not limited to: refining selected plan concept based on approved schematic design; refining elevation and section concept; reviewing assembly and systems selection; developing and revising

outline specifications; coordinating engineering drawings; evaluating materials, assemblies and systems; coordinating design review meetings with IFF and Lighthouse

8. Commitment to design to project and operating budgets
9. Prepare project specifications manual
10. Prepare construction documents, including but not limited to: developing construction drawings, preparing site demolitions plans; providing site plan, landscape plan, floor plans, roof plans, interior elevations, reflected ceiling plans, building elevations, exterior wall sectional and details, interior partition details, room finish schedule, door schedule, casework elevations, and kitchen plan; specifications; coordinating and integrating structural, MEP, fire protection civil systems with architectural design; conducting meetings at 50%, 75% and 100% completion or other agreed upon milestones
11. Participate in bidding and negotiation, including but not limited to: organizing and distributing bid documents; advising Lighthouse on aspects of general contractor contract; conducting a pre-bid conference; responding to contractor inquiries; preparing document addenda; receiving, reviewing and summarizing bid data
12. Building permit assistance: assisting Lighthouse in submitting documents for permit review and approval
13. Respond to inquiries from lender and lenders' inspecting architects, if required
14. Value engineering services, if required
15. Construction administration, including but not limited to: reviewing material submittals and system shop drawings; preliminary construction workshop to explain the project design intent; conducting periodic site visits and providing construction oversight; attending weekly job site meetings; preparing minutes from job site meetings; preparing clarification sketches; reviewing and responding to change orders; reviewing applications for payment; preparing and managing punchlist items for incomplete work
16. Develop specifications including but not limited to: providing a project manual for all materials, standards and assemblies

#### **PROPOSAL REQUIREMENTS**

Respondents must address the following key areas:

1. **Scope of Services:** Please provide a detailed a scope of services and an explicit statement of items that may be excluded from the list above, if any.
2. **Timeline:** A proposed timeline indicating the various phases from planning through construction completion. The timeline does not need to tie directly to the calendar but should indicate the proposed duration of each phase.

3. Proposed Fee.

- In the absence of a defined project budget, please provide a proposed fee schedule for construction projects ranging from \$2 to \$5 million in \$1 million increments. Please include hourly rates of all key personnel. The fee schedule should include the cost of all engineers and consultants. If not, please specify which fees are excluded and their associated fees
- Please allocate the proposed fee per the phases presented in the timeline.

4. Team: Description of the Proposed Project Team including engineers and consultants

5. Qualifications: In addition to a general representation of qualifications, respondents should address the following key areas:

- Relevant project experience working on school projects, including but not limited to adaptive reuse of industrial properties for school use
- Relevant experience working with non profit agencies
- Experience and track record with designing facilities, and in particular school facilities, at low-cost
  - a. Include reference to strategies used to minimize cost as appropriate
- Resumes of key personnel, including resumes of key personnel from other firms on the team
- Four references for recently completed projects
- Management approach, organization, and Lighthouse interface including staffing and technology
- Construction cost/benefit life-cycle estimating experience and control procedures
- Description of corporate financial capacity and time commitments

**SELECTION PROCESS AND TIMELINE**

Requests for clarification are due to IFF by 12:00 on Friday, January 28<sup>th</sup>, 2011. Proposals are due no later than **Monday, February 7<sup>th</sup> at 5:00 pm.** Please submit an electronic version of the proposal to [hheaviland@iff.org](mailto:hheaviland@iff.org) and three hard copies of the proposal to:

Heather Heaviland  
IFF  
215 North Water Street, Suite 225  
Milwaukee, Wisconsin  
53202

Any proprietary materials submitted by the architect that are to be considered confidential in nature must be clearly marked as such. Lighthouse reserves the right to accept or reject any or all proposals received, for any reason whatsoever; to negotiate with all qualified sources; or to cancel the RFP in part or in its entirety.

Questions regarding the RFP should be directed to Heather Heaviland 414-563-1102 or [hheaviland@iff.org](mailto:hheaviland@iff.org)

Attachments:

Sample AIA Contract.

Timeline for North Point Charter Facility Acquisition and Construction (Draft)

