



## **Request for Qualifications for Master Planning Services**

Big Sandy School District 100J  
PO Box 68, 619 Pueblo Avenue  
Simla, CO 80835

**Date Submitted:** September 2, 2010  
**Date Due:** Received by September 22, 4:00 PM

Submit (2) Hard Copies to: **Big Sandy School District 100J**  
**PO Box 68, 619 Pueblo Avenue**  
**Simla, CO 80835**

Submit an electronic PDF copy to: **[swilson@bigsandy100j.org](mailto:swilson@bigsandy100j.org)**

Colorado Department of Education, Technical Assistance:  
**Cheryl Honigsberg**  
**1525 Sherman Street, B-17**  
**Denver, CO 80203**

**Communication:** All questions and communication related to this project should be directed to Steve Wilson only via email at [swilson@bigsandy100j.org](mailto:swilson@bigsandy100j.org)

See timeline for questions and answers. Do not contact the Colorado Department of Education regarding this RFQ.

We are pleased to present this Master Planning opportunity to you and your company.

Submittals received after September 22 at 4:00 PM or submittals delivered to the incorrect location will not be accepted. Submittals can be mailed/ Fed Ex/ UPS or hand delivered.

### **Project Background**

Big Sandy School District 100J does not have a facilities/ educational master plan and desires to obtain one. Big Sandy is a district that currently has a Preschool through twelfth grade all on one campus; athletic fields are four blocks away.

Our academic campus includes a gym and administration offices that were built in 1954. The main academic area includes 5 round pods that include an elementary pod, a middle school pod, a high school pod, a cafeteria/art/music pod, and a central main office/library/one classroom pod that were built in 1968/1969. In 1984 a second gymnasium/concession stand/wrestling room/locker rooms addition was added. We added two used modulars in 1993 and 1994 which currently house 3 elementary and preschool classrooms. In 1998 an addition was added to accommodate more classrooms. In 1999 a separate building was built to house our Industrial Arts program. And in 2006 a separate Transportation building was added to house our Auto Mechanics program and serve as a bus barn. Our total facility comprises 90,799 square feet.

The school district participated in a statewide school facility assessment which was completed and finalized in the winter of 2010 which is available on the district website.

Safety issues include having our main entrance unmonitored as the main office is within the interior part of the building. We have approximately 80 exterior doors. Many infrastructure systems need upgrading including fire, plumbing, electrical, space, security, ADA, safety, education delivery, but not limited to above.

### **General Description of Services and Project**

The primary objective of the District is to assist in the preparation of a comprehensive facility/ educational master plan that will meet both short term as well as long term goals for the district. The consultant will be expected to explore multiple options/ scenarios for the campus, and will work with the school district to evaluate, define, and estimate the financial and other impacts for each option considered.

The selected Master Planner will meet with District, community groups, board members, etc. to determine options to address the renovation or replacement of district facilities. In addition to the options generated by the community, the Master Planner will provide their expertise to develop additional options for the District's consideration.

The resulting document should contain the referenced below:

- 1) A facility/ educational master plan that will identify short and long term goals for the district in both facility needs and 21<sup>st</sup> century educational delivery.
- 2) Upon the completion of the master plan the consultant will assist the district in identifying a process to meet the master plan. If a decision is made to apply for a BEST grant or other grants or funding sources, the consultant will include a separate plan to assist the district in applying for such grants.
- 3) Upon completion of the master plan, if the decision is made to put a bond question on the pending November election to either ask voters for specific projects that result from the master plan and or anticipate a bond to assist the district with matching funds for a BEST grant the consultant will include in a separate description how they will assist the district in putting the necessary documentation/ graphics to get ready for the bond election.

### **General Information**

This solicitation is issued by Big Sandy School District 100J. As such, Big Sandy School District 100J reserves the right to: 1) terminate, suspend or modify the solicitation process or any contract negotiations entered into pursuant to the process at any time; 2) reject and or all submittals at any time; and/or 3) waive any informalities, irregularities, or omissions in submittals at any time.

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The scope of the RFQ is broken down into the following sections:

### **Section 1 – Introduction**

#### A. Intent:

The purpose of this RFQ is to solicit and qualify proposals to establish a contract with a Service Provider for a Master Planner experienced in successfully completing educational projects preferably PK-12.

#### B. Project Description:

To develop a facilities/ educational master plan (at a minimum, 5 years out), identify options and present to the district for decisions in finalizing the mission of the district.

#### C. Resource Materials

Materials and information pertinent to this Project are available on the districts website at <http://bigsandy.ppbooces.org>

. These materials include:

1. State wide assessment by the Colorado Department of Education, Capital Construction, Assistance Program
2. RFQ for Master Planning Services

### **Section 2 – Submittal Process**

A. For this contract award process, Big Sandy School District 100J has bundled two solicitations in sequence within this document: Phase One, and Phase Two. The Phase One procedure, which is the Request for Qualifications (RFQ), is designed to select a “short list” of the most qualified proposer’s who will be invited to interview. In Phase Two, the number of proposals will be limited to a maximum of five (5), to allow for an efficient baseline among the most qualified proposals.

#### B. Phase One – Request for Qualifications:

The first phase of the selection process is solely qualifications based. The Big Sandy School District 100J will determine, based upon each firms submittal, whether or not

that proposer possesses the qualifications to assist the district with defining the districts goals/ mission for both educational delivery and supporting facilities.

The responses will be reviewed by a selection committee, as determined by the Big Sandy School District 100J. The selection committee may also consult additional sources for subject matter expertise. A matrix will be utilized to review and identify the submissions most qualified to provide the district with the identified scope of work. Those proposers that the committee determines are most qualified will be short listed and asked to participate in an interview process.

Please note the review committee will review first for completeness of proposal. Is the information requested provided and that the proposal is not exhaustive in content and to the point. Proposals that provide more than requested or have not provided the information as requested will be eliminated.

C. Phase Two – Interviews:

Each firm that is short listed will be asked to interview. The interviews are an opportunity to communicate to the selection committee your understanding of the project, offer your methodology for meeting the stated criteria, and state how your firm will interface with Big Sandy School District 100J. The result of the interviews will be a formal ranking. Interviewees will be numerically evaluated. The scores of the evaluation committee will be added together from Phase 1 and Phase 2, and the applicant with the highest score will be selected and enter into negotiation with the school district.

D. Negotiation:

The selected “most qualified” master planning organization will move into negotiation with the district. If the district is unable to negotiate with the selected master planning consultant the district has the right to negotiate with the second selected consultant and so on if necessary.

E. Project Schedule:

RFQ Available	Date	September 2, 2010
Deadline for Submitting Questions*	Date	September 9, 2010
Response to Questions	Date	September 13, 2010
Responses to RFQ received by	Date	September 22, 2010 at 4:00 PM
Review and Short List RFQ Responses	Date	September 27, 2010
Invite to Interview	Date	September 27/28, 2010
Walk through with short list	Date	September 30, 2010
Interviews	Date	October 6, 2010
Notify Selected Firm	Date	October 7, 2010
Contract Negotiations	Date	October 11-12, 2010
Notice to Proceed	Date	October 14, 2010
Contract Finalized	Date	October 18-22, 2010
Master plan completed	Date	December 17, 2010

Evaluate options to implement the master plan, Consider BEST grant

Date December 17, 2010 – January 19, 2010

Board Meeting January 5 and 19 Update Needed

Date January 5 and January 19

Board Decision on Master Plan Options Date January 19

Write Grant Application, CDE Coordination

Date January 20-February 21, 2011

Submit possible BEST grant application Date February 28, 2011 or sooner

\*Note: Questions will be answered September 13, 2010 and sent via email to the identified contact person of all respondents. Please confirm receipt with [swilson@bigsandy100j.org](mailto:swilson@bigsandy100j.org).

Security is a priority at our school; therefore, we are not planning a walk through as a part of the RFQ process.

### **Section 3 – Selection Criteria**

#### A. Selection Criteria

Master Planning firms or teams seeking consideration for the Project will be evaluated including the following criteria:

<u>Selection Criteria</u>	<u>Point Value</u>
RFQ Completion - How complete and concise was the letter of interest and RFQ response? Was the RFQ well organized, with complete information responding to all submittal criteria?	15 points
Project Approach - RFQ documents a clear understanding of the Owner's needs and clear direction to completing the scope of work.	15 points
Key Personnel - Experience of key personnel. Relevant planning background including school experience.	20 points
Schedule - Ability to complete the planning tasks within the time frame needed to submit a BEST grant application and place a facilities improvement bond on the November 2011 ballot. Submitted a complete and understandable schedule.	20 points
Firm Experience - Relevant experience with school facility planning and design.	20 points
References - References verifying quality of work performed within school facility planning.	15 points
Total Points	105 points

Short listed applicants will be invited to attend an interview that will have a total of 20 possible points. These points will be added to the scoring of the points above for total possible points of 125.

### **Section 4 – Requirements for selection review**

## **PHASE 1 - RFQ RESPONSES:**

### **A. Submittal Requirements**

Each respondent firm must comply with the submission requirements as outlined below. Listed are the submittal requirements for the RFQ phase.

Immediately upon receiving the RFQ all proposers must contact Steve Wilson via email at [swilson@bigsandy100j.org](mailto:swilson@bigsandy100j.org) and communicate your firm's intent to submit a response to this RFQ and give Big Sandy School a single point of contact with e-mail correspondence.

Proposers shall submit two (2) hard copies of their completed statement of qualifications. Submittals can be mailed/ Fed Ex/ UPS or hand delivered. Proposers shall also submit an electronic PDF copy to [swilson@bigsandy100j.org](mailto:swilson@bigsandy100j.org).

### **B. Master Planning Experience**

Please provide the minimum documentation substantiating the following:

- a. Master Planning Consultant shall have been in business for a minimum of two years without any official unresolved record of complaints registered or filed.
- b. During the past one year, Master Planning Consultant shall have successfully completed a minimum of two projects of type and cost similar to the proposed project. Demonstrate expertise and experience in preparing educational/ facilities master plans.
- c. Master Planning Consultant shall indicate its current capacity to complete the proposed Project by providing a summary of its current workforce and staffing, and a complete list of projects i) currently under construction, ii) under contract, and iii) in negotiation.
- d. Master Planning Consultant shall identify an individual who will be the main point of contact and responsible for providing pre-project consulting for the duration of the project who will communicate with the District or its designated representative(s). The work experience of these individuals shall be provided. Master Planning Consultant shall not change or substitute these individuals without prior approval. Big Sandy School District 100J reserves the right to determine the acceptability of these individuals.
- e. Demonstrate experience understanding and analyzing school operations, enrollment projections and demographic data;
- f. Knowledge of LEED & CO-CHPS criteria and program requirements;
- g. Experience with long-term capacity requirements related to making recommendations for system upgrades/ additions/ new facilities which align with the master plan.
- h. Provide Team experience and responsibilities including resumes.
- i. Project organization and responsibilities
- j. Overall understanding of the project;
- k. Understanding of the District, its organization and leadership;
- l. Administrative oversight and interpersonal skills;
- m. Project organization structure
- n. Key personnel experience

- o. Ability to provide an in depth cost evaluation to be utilized in the grant application. This will include hard and soft costs. Ability to identify and develop costs to any potential unknown costs such as impacts on access to the site and road improvements etc.
- p. CDE will provide technical assistance to the school district. Identify **understanding** of oversight of the BEST program as it will be the key source of funding.
- q. A challenge of this project will be the timeline to complete the work. If the master plan identifies the district's need to identify funding sources, the timeline for the BEST Grant is December 2010 through March 2011. Show your ability/ approach to organize and meet schedules.
- r. Identify any other unique challenges/ approaches that you have experienced that will assist the district with the master plan and ultimately a successful grant application.

### C. *Grant Application Support*

In the event that the master planning process results in the District proceeding with a BEST grant application, the consultant will need to assist the district with preparation of a successful 2011 BEST grant application. These grant assistance services will include:

- Ensuring that all costs (hard, soft, and owner) and scope are included in the grant application.
- Ongoing communication with the District, coordination of and attendance at meetings as needed and requested.
- Reviewing BEST application requirements and familiarization with BEST grant information from the CDE website.
- Communication with CDE staff as needed.
- Documentation required by CDE to provide to the Colorado Historical Society as applicable.
- Preparing the BEST grant application including scope narrative for final district approval.
- Preparing LEED and or CO-CHPS scorecard and narrative.
- Providing additional information required by CDE to complete the analysis of the Grant application.
- Acting as liaison for the District for CDE follow up grant questions.
- Other duties as required.

Note: BEST grant support services are to be considered optional for the District but pricing for these services will need to be provided by the apparent winner in their pricing proposal.

### D. *Bond Issue Support*

In light of the recommendations made by the master plan, and the successful BEST grant application, or in lieu of any such grant, the District may pursue a bond issue. In this case the District may request the following services as part of the master planner's scope of services:

- Assistance with providing the District with graphic images of conceptual design for the community.
- Attendance at community meetings to discuss the bond election; answering questions regarding the project; and providing the District with information as needed to prepare for the bond election.

Note: Bond issue support services are to be considered optional for the District but pricing for these services will need to be provided by the apparent winner in their pricing proposal.

## **PHASE 2**

### **A. Requirements for short listed applicants**

Applicants that have been selected to interview must bring the team that will be intended to staff the master plan. Please also include the organization that will assist with a potential budget if using an outside consulting source/ service.

### **Contract and Fee Negotiation**

The applicant with the highest score will be considered the apparent winner and will be invited to enter into fee negotiations with the District. If the fee proposal proves unacceptable and is not successfully negotiated, the District reserves the right to negotiate with the next highest scoring applicant.

If the master planning process results in a successful BEST grant application and or a successful bond issue, the District will engage in a separate competitive selection process to select the design and construction team for the project(s). As a result, this contract will terminate on election day 2011.

The apparent winner will be notified within 48 hours of the interview and should be prepared to discuss the following items:

- Fee clearly defined for all aspects of work (Fees, profit, overhead etc.)
- Statement of Work
- Confirmation that all scope items from the original RFQ will be addressed
- Any exclusions
- Number of hours
- Number of people
- Other resources and their uses
- Anticipated reimbursables not to exceed
- Hourly rates for all personnel involved in the project
- Number of site visits anticipated to complete the work, access to facilities and personnel
- Additional cost for assistance with the grant.
- Additional cost of bond issue support.

The fee is anticipated to include all costs including reimbursables for the project resulting in a lump sum or “not to exceed” contract.

## **Section 5 – Organization of the submittal proposal**

The RFQ information shall be organized per the submittal format. Organization and brevity will be appreciated. The sections of the RFQ shall be indexed and tabbed per the 5 sections noted below for easy reference.

### **Tab 1 – Letter of Interest**

A maximum two page letter of interest that includes a synopsis of the firm, business principles, selected planning team members, general qualifications and distinguishing characteristics, primary contact information; signed by the Principal in charge representing the contractual authority of the firm.

### **Tab 2 – Project Approach to Master Planning**

Based upon the scope of services and project data provided in this RFQ and available supplemental data; provide a narrative description of the work to be accomplished. The overview should articulate an understanding of the Owner and the Owner's needs. The overview should describe the proposed work and all applicable requirements. The overview should clearly state the master planner's approach to integrating multiple sources of information about the District's facilities into the master plan.

### **Tab 3 – Planning Team Key Personnel**

Include resume information for each member of the planning team. The primary contact for the master planning firm should be clearly defined. Identify the specific role and phase of participation anticipated for this Project and highlight the unique elements/ qualifications provided to the design team. Provide background information including education, professional titles, related qualifications, specific roles in past projects, and relevant experience of all team members including any sub-consultants. Provide a clear description and process of estimating services (how/who will provide cost information?).

### **Tab 4 – Schedule**

It is the intent of Big Sandy Schools to complete the master plan by December 17, 2010. Provide a milestone schedule and demonstrate the firm's ability to meet this schedule.

### **Tab 5 – Relevant Experience & References**

Provide a list, project description and contact information for five previous school clients. Include relevant information about each project that applies to the experience of your firm relevant to the current RFQ. Provide a list of references for projects that your firm, including your sub-consultants, have performed collectively.

## **Section VI – General Requirements**

### **A. Verification of Information:**

Proposers are hereby notified that Big Sandy School District 100J will rely on the accuracy and completeness of all information provided in making its selection. As such, Proposers are urged to carefully review all information provided to ensure clarity, accuracy and completeness of such information. As Big Sandy School District 100J deems necessary and appropriate in its sole discretion, Big Sandy School District 100J

reserves the right to make any inquiries or other follow up required to verify the information provided.

B. Disclosure of Information:

All submissions and other materials provided or produced pursuant to this RFQ may be subject to the Colorado Open Records Law, CRS 24-72-201 ET. Seq. As such, Proposers are urged to review these disclosure requirements and any other exceptions to disclosure of information furnished by another party and, prior to submission to CDE, appropriately identify materials which are not subject to disclosure. In the event of a request for disclosure of such information, school district shall advise the Proposer of such request to give the Proposer an opportunity to object to the disclosure of designated confidential materials furnished.

C. Discrimination in Employment:

In connection with the performance of work on this project, the selected Pre-Project Consultant agrees not to refuse to hire, discharge, promote or demote, or to discriminate in matters of compensation against any person otherwise qualified, solely because of race, color, religion, national origin, gender, age, military status, sexual orientation, marital status, or physical or mental disability; and the Pre-Project Consultant further agrees to insert the foregoing provision in all subcontracts hereunder.

D. Applicable Laws:

This selection process and the performance of any selected Proposer shall be subject to, governed by and construed in accordance with applicable Federal Laws, the laws of the State of Colorado and the Charter, and other applicable regulations as the same may be amended from time to time.

E. Addenda:

As Big Sandy School District 100J may require, addenda may be issued to supplement this RFQ. All Proposers in receipt of the RFQ are considered registered. The list of registered participants will be used to issue all communications regarding this RFQ, including formal addenda and date changes. It shall be conclusively presumed that each Proposer submitting a response has affirmatively registered with Big Sandy School District 100J for this project and has received all subsequent communications relating to the project. Proposers will be responsible for all such information issued by this method.