

REQUEST FOR QUALIFICATIONS/PROPOSAL (RFQ/P) FOR A FACILITY MASTER PLANNER

McClave School District – Owner

P.O. Box 1
McClave, CO 81057
Phone 719-829-4517

PROPOSAL DUE/DELIVERY DATE 4:00 p.m. Feb. 16, 2021

Deliver 1 electronic copy via email + 4 Original Copies to:

Merlin Holmes - Superintendent

308 Lincoln Avenue
McClave, CO 81057
Email Address: merlin.holmes@mcclaveschool.org

All official communication with Candidates and questions regarding this RFQ/P will be via email to the Owner Contact listed above. **No inquiries will be accepted after the clarification deadline as indicated in the project schedule.**

All Candidate inquiries will be responded to at the same time. Responses to clarification will be made by email to all Candidates who requested the RFQ/P. Candidates should not rely on any other statements, either written or oral, that alter any specification or other term or condition of the RFQ/P during the open solicitation period. **Candidates should not contact any other team members or individuals associated with the Owner or the Colorado Department of Education (CDE) regarding this RFQ/P or this project.**

I. PROPOSED PROJECT SCHEDULE

RFQ/P Available	1-12-21
OPTIONAL Site Visit	As scheduled
RFQ/P Clarification Deadline	1-26-21
RFQ/P Clarification Responses	2-2-21
RFQ/P Responses due	2-16-21
Interview Invitations sent to Short-Listed Candidates	3-9-21
Interviews	3-29-21
Candidates Notified of Selection	4-13-21
Contract Negotiations Complete	4-20-21
Decision Memorandum Sent to Unsuccessful Candidates	4-20-21
Notice to Proceed Given to Successful Firm	4-20-21
Master Plan DRAFT Substantially Complete	6-11-21
(IF PURSUING GRANT) Draft Grant Application/CDE Coordination	TBD
(IF PURSUING GRANT) Grant Application Submittal	TBD

II. BACKGROUND

Owner Background

McClave School District RE-2 is located in Southeast Colorado. The district has a reputation for strong academic success and healthy culture. The facility is a significant asset to our students.

McClave School District has been, and continues to be, fiscally well managed. During the past three years, the district has averaged over \$300,000 in net revenue. Reserves are equal to 250 days of operation. Maintenance and custodial teams work hard to keep our existing facility clean and in good working order. This tends to hide some of the issues with our physical facility.

Project Description

Our current K-12 facility has been built in numerous phases, from 1962 to 2010. Older portions of the building are in need of significant repair or replacement. In addition, septic systems, parking, entry security, and other issues abound. Before moving forward with significant expenditures, the Board of Education and administration want to develop a Master Plan that analyzes options available to the district.

A community survey was conducted from October 28th to November 9th. In general, the community supports a deliberate planning process in order to make the best use of limited resources. Support for a bond issue was limited in our survey. The Assessed Valuation of the district is just over 24 million, so the ability to raise significant funds is limited even if a Bond Issue were to pass. Therefore, BEST grant funding may be a high priority.

Facilities Included in the Scope of Services

1. McClave School District - K-12 building

308 Lincoln Avenue
McClave, CO 81057

Constructed: 1962

Additions: 74, and numerous others. See overhead map included.

Current Enrollment: 210

Square Footage: 85,000+

Site: 6 acres

Description of Facility: K-12 building with numerous construction dates

Historical significance: none

III. MASTER PLAN OBJECTIVE

The objective of the Owner is assistance in the preparation of a facility Master Plan that will address both the short term and long term facility needs. The Master Plan will serve as a "road map" ultimately leading to high performing school facilities.

Because the Owner may decide to apply for grant funding the successful Candidate must accommodate the dates agreed to in the Final Project Schedule.

Please note this RFQ is for Master Planning Services with possible BEST grant writing and assistance. If the district pursues a BEST grant and the project were awarded it will be the districts discretion to maintain the chosen Master Plan firm or go out for an RFQ requesting consultants to complete the awarded project.

IV. SUBMITTAL REQUIREMENTS

Organize your RFQ/P response using the following outline. Please separate each section with dividers or tabs using the appropriate section labels. **No fees should be included in the RFQ/P Submittal.**

SECTION 1 – LETTER OF INTEREST

Submit a maximum two page letter of interest that includes a synopsis of the firm, business principals, distinguishing characteristics, approach to completing this project, and primary contact information. It should be signed by the principal-in-charge.

SECTION 2 – EXPERIENCE AND QUALIFICATIONS

Please address each criterion listed below as it relates to your firms relevant experience and qualifications.

1. Identify the individual who will be the main point of contact and the team responsible for providing services for the duration of the project.
2. Provide all team members experience, background and responsibilities including resumes.
3. Describe your firms past experience with master planning and educational programming, and include examples of Master Plans completed.
4. Provide your firms project organization structure and responsibilities.
5. According to your firm, what is the value of a Master Plan and what is it used for?
6. What criterion does your firm use to recommend that a building should be remodeled or that it should be torn down and rebuilt?
7. Describe your approach to integrating multiple sources of information about an Owner's facilities and community into the Master Plan.
8. How does your firm provide an in-depth cost evaluation associated with deficiencies in a facility? This should include hard and soft costs.
9. Describe your ability to organize and meet schedules.
10. Identify and include at least one Master Plan your firm has completed with a similar size and scope to the proposed project.
11. Demonstrate your firm's experience understanding and analyzing school operations, school programs, enrollment projections and demographic data.
12. Knowledge of LEED, US CHPS, and Green Globes criteria, as well as BEST grant program requirements.
13. Understanding of the Owner, its organization and leadership.

14. Identify any other unique challenges/approaches that you have experienced that will assist the Owner with developing a successful Master Plan and ultimately successfully implement the Master Plan.
15. Based on your current workforce, staffing, and the number of projects your firm currently has under contract or in negotiation, does your firm have the capacity to complete this project?
16. This project requires the Candidate to carry, at a minimum, general liability insurance and workers compensation according to State laws.

SECTION 3 – SCOPE OF SERVICES

The Candidate chosen will be expected to develop a Master Plan through a team effort involving school administration, staff, students, community members, and professional consultants with disciplines in education, planning, programming, architecture, engineering, construction, facility management, facility operations, and technology. The Master Plan should explore a variety of options, based on a thorough assessment of the facilities, to develop a strategic implementation plan for the long term facility needs.

Please address each of the following items below.

1. Facilities Master Planning Services

Complete the Scope of Services Matrix provided as Exhibit A. Exhibit A is broken up into three categories: required services, additional services desired by the Owner, and additional scope offered by Candidate. The Candidate must validate each line in the exhibit by marking either provided or excluded.

The required items in Exhibit A represent the minimum deliverable requested in this RFQ/P. By submitting a response and proposal to this RFQ/P, candidates are agreeing to provide all services associated with the development of the Master Plan deliverable described. In general, these services may include, but are not limited to:

- a. Facilitating Community/Committee Meetings to gather information and seek input;
- b. Performing Facilities Assessments and comparing findings with the CDE Statewide Facility Assessment;
- c. Performing SF, program, and classroom utilization studies to discover and correct inefficiencies;
- d. Assisting Owner and Owner's committees with analyzing information and/or generating options;
- e. Developing multiple options for consideration, and provide adequate information for analysis;
- f. Assisting Owner in prioritizing potential capital projects toward build-out of selected option;
- g. Completing and publishing the Master Plan document as described in deliverable (Exhibit A)

In addition to completing Exhibit A, please provide a separate narrative description of your approach to the scope requested, describing quantity and types of proposed meetings, site visits, unique methodologies, etc. Additional services or scope may be proposed and identified in the final section of Exhibit A, however fees for these services should be identified as a line item in the fee proposal for consideration. Any exclusions from services or deliverables described must be explicitly identified in the submittal.

2. ADD ALTERNATE #1 - Grant Application Support Services

In the event that the master planning process results in the Owner proceeding with a BEST Grant application, the Owner may request assistance with preparation of a BEST grant application. These grant assistance services

may include but are not limited to:

- a. Ensuring that all costs (hard, soft, and owner) and scope are included in the grant application;
- b. Ongoing communication with the Owner;
- c. Coordination of and attendance at meetings as needed and requested (via conference call if possible);
- d. Reviewing BEST application requirements and familiarization with BEST grant information from the CDE website;
- e. Compare Master Plan assessments with Owner's CDE Facility Assessment data, and coordinate notable discrepancies with CDE staff;
- f. Communication and cooperation with CDE staff as needed;
- g. Documentation required by CDE to provide to the Colorado Historical Society as applicable;
- h. Preparing the BEST grant application including scope narrative for final Owner approval;
- i. Preparing LEED, CHPS and/or Green Globes scorecard and narrative;
- j. Providing additional information required for CDE to complete the analysis of the grant application;
- k. Acting as a liaison for the Owner for CDE follow-up grant questions;
- l. Other duties as required;

Please provide a narrative expressing your firm's interest and capacity to complete this scope as presented.

3. ADD ALTERNATE #2 - Bond Issue Support Services

In the event that the master planning process results in a successfully awarded BEST project, the Owner may request the following additional services:

- a. Assistance with providing the Owner with graphic images of conceptual design for the community
- b. Attendance at community meetings to discuss the bond election
- c. Attendance on conference calls, answering questions regarding the project, and providing the Owner with information as needed to prepare and communicate the project for the bond election

If the Candidate is interested in providing Add Alternate #2, please provide a narrative expressing your firm's interest and capacity to complete this scope as presented.

SECTION 4 – SCHEDULE

It is expected that your firm has the current capabilities and capacity to complete the Master Plan by the date listed in the project schedule. Provide a detailed Master Plan schedule, including milestones, from the notice to proceed date to the completion of the Master Plan. Provide reasoning, in this section, for any modifications or alterations your firm wishes to make to the proposed project schedule

SECTION 5 – REFERENCES

Provide a comprehensive list of all school projects completed or begun within the last 5 years, with contact information, along with a project description. Identify in the reference list which projects this master team has performed collectively. The Owner reserves the right to check additional references beyond those provided in the submittal.

V. SUBMITTAL REVIEW & SELECTION PROCESS

The selection process consists of two phases, followed by negotiations.

Phase 1 – RFQ/P Review

The Owner will evaluate and grade the RFQ/P submittals based on the selection criteria listed below:

Selection Criteria	Grade
Section 1: Letter of Interest. How complete and concise was the letter of interest and RFQ/P response? Was the RFQ/P well organized, with complete information responding to all of the submittal criteria?	
Section 2: Experience and Qualifications Provided a comprehensive and insightful experience and qualifications package which highlighted key personnel in addition to other items as stated.	
Section 3: Scope of Services. Candidate has affirmed each of the Owners requirements for this project and demonstrates a clear understanding of Owner's needs and clear direction toward completing scope of work.	
Section 4: Schedule. Ability to complete the planning tasks within the timeframe needed. Submitted complete & understandable schedule.	
Section 5: References. Candidate has provided a comprehensive project list with contact information for projects completed over the last five years.	
Total Overall Grade	

Phase 2 – Interview

An interview invitation will be sent out to the Candidates selected from the RFQ/P submittal grading process on the date noted in the project schedule. The invitation will explain the interview requirements and provide the time and location. The purpose of the interview is to ensure a full understanding of the RFQ/P responses and to introduce key members of the Master Plan team.

The interviews will consist of a short presentation followed by a longer period for questions and answers. During the short presentation, the lead consultant for the project should be identified along with members of the Master Planning team. Please note team members that will not be directly working on the project are not invited to the oral interviews.

VI. FEE PROPOSAL

Candidates shall prepare a detailed fee proposal as outlined below. Failure to provide a fee proposal which addresses each of the items listed below may result in disqualification from the RFQ/P process.

Detailed fee proposals shall include the following:

- ✓ Lump sum fee;
- ✓ Specific fee breakout for major sections of work
- ✓ Statement of work;
- ✓ Confirmation that all scope items from the original RFQ/P will be addressed;
- ✓ Any exclusions with explanations;
- ✓ # of hours;
- ✓ # of people;
- ✓ Other resources;
- ✓ How the resources are to be used;
- ✓ Breakout of anticipated reimbursables included in the fee proposal;
- ✓ Number of site visits anticipated to complete the work;
- ✓ Breakout of fees for any non-required scope proposed;
- ✓ Pricing for add alternate #1 – Grant Application Support Services*
- ✓ Pricing for add alternate #2 – Bond Issue Support Services*

*Note: Add alternate #1 & #2 will be considered optional for the Owner. Provide a separate fee for each of these services independent of your Master Plan fee.

The negotiated fee is anticipated to include all costs, including reimbursables, for the project resulting in a "not to exceed" format contract.

Fee proposals will be opened and evaluated during the evaluation and review process. A weighted fee proposal score will be included in the final interview score.

If the apparent winner's fee exceeds the Owners budget and if subsequent negotiations with the apparent winner are unsuccessful, the Owner reserves the right to negotiate with other Candidates.

VII. Acceptance and Rejection

After the final selection has been made, the Owner will provide a summary of grades and a decision memorandum to each of the RFQ/P Candidates.

The Owner reserves the right to select any or reject any and all proposals in their best interest. The Owner also reserves the right to pre-qualify any or all Candidates or reject any or all Candidates as unqualified, including without limitation the right to reject any or all nonconforming, nonresponsive, unbalanced, or conditional, qualifications. The Owner also reserves the right to re-solicit, waive all informalities not involving price, time, or changes in the work, and to negotiate contract terms with the apparent successful proposer.

The Owner is not responsible for cost incurred in preparation of this proposal. Proposals will not be returned and become the property of the Owner once submitted. By submitting a proposal all Candidates agree to the terms and conditions of this RFQ/P and the RFQ/P will become part of the awarded Candidates contract. The apparent winner will be responsible for submitting a draft agreement to be used for this project. The Owner and the Owner's legal council will review the agreement and negotiate terms prior to commencement of work.

If the master planning process results in a decision to move forward on a capital project, the Owner will complete a separate competitive selection process to select the design and construction team for that project.

VIII. RFQ/P Supporting Material

1. [Exhibit A: Master Planner Scope of Services Matrix](#) to be completed as part of this submittal

The following are available to be utilized by the master planner for reference in developing a Master Plan:

1. Capital Construction Assistance Public Schools Facility Construction Guidelines. Master Planner to reference this document as a guideline during the master planning process.
2. Summary of 5B 07-51 re: High Performance Requirements. These requirements apply to building projects receiving 25% or more of state funding.
3. 24-80.1-104 C.R.S. ref: Colorado Historical Society.
4. Public School Facilities Master Plan Guidelines from CDE's Division of Public School Capital Construction Assistance. This document represents the Owner's minimum expectations for the deliverables and associated scope of the Master Plan.
5. Statewide Facilities Assessment should be reviewed and failing systems further investigated in the assessment portion of the Master Plan.