



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

### Otis School District R-3 (Owner)

301 Work Street  
Otis, Colorado 80743  
Phone (970) 246-3486

**PROPOSAL DUE DATE/DELIVERY REQUIREMENTS- 4:00 p.m. October 10<sup>th</sup>, 2011**  
**Deliver 1 electronic copy via email + 6 Original Copies to:**

### **Owner Contact Michael Warren**

301 Work Street  
Otis, Colorado 80743  
Phone (970) 246-3486  
warrenm@osdco.com

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 which will be after the "Clarification Deadline". Responses to clarification will be made available 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 team members or any individual associated with the Owner or the Colorado Department of Education (CDE) regarding this RFQ or this project.**

## **I. PROJECT SCHEDULE**

|   |                   |
|---|-------------------|
| RFQ/P Available                                       | 10/12/2011        |
| OPTIONAL Site Visit                                   | 10/17/2011        |
| RFQ/P Clarification Deadline                          | 10/19/2011        |
| RFQ/P Clarification Responses                         | 10/20/2011        |
| <b>RFQ/P Responses due</b>                            | <b>10/26/2011</b> |
| Interview Invitations sent to Short-Listed Candidates | 11/02/2011        |
| <b>Interviews</b>                                     | <b>11/09/2011</b> |
| Candidates Notified of Selection                      | 11/11/2011        |
| Contract Negotiations                                 | 11/15/2011        |
| Decision Memorandum Sent to Unsuccessful Candidates   | 11/15/2011        |
| <b>Notice to Proceed Given to Successful Firm</b>     | <b>11/18/2011</b> |
| <b>Master Plan Complete</b>                           | <b>01/04/2012</b> |
| <br>  |                   |
| Draft Grant Application/CDE Coordination              | 03/02/2012        |
| Grant Application Submittal                           | 03/02/2012        |

## II. BACKGROUND

### Owner Background

The town of Otis is a small, mostly agricultural, rural community of 510 residents located approximately 135 miles east of Denver, Colorado. It is an area of wide-open prairie and dryland wheat fields dotted occasionally by circles of irrigated farmland.

The Otis School District is very fortunate to enjoy the support of its community. The Board of Education is dedicated to providing the best education and educational facilities for their children. The School District has a total of 192 students (Pre-Kindergarten through twelve) and employs 24 certified staff members and 10 classified staff members.

The District has two separate building sites approximately 500 feet apart that house the educational programs. Otis Elementary School (OES), built in 1985, and the preschool addition, built in 2008, house PK-6 grades. Otis Jr/Sr High School (OHS) houses grades 7-12. The OHS facility consists of the original 1922 building plus additions constructed in 1940, 1962, and 1998. The core academic area at OHS is the 1922 original school with the commons area added as a WPA project in 1940. Additional classrooms, offices, and the high school gymnasium were added in 1962. The latest addition to the high school building was added in 1998; this addition houses the library media center, distance learning classroom, locker rooms, and several vocational classrooms and shops. Square footage on the buildings sit at just under 92,000 square feet (OES – 22,923sqf and OHS-60,036sqf).

### Project Description

According to findings of the State-conducted Facility Assessment, Otis School District is a key candidate for BEST funds. The following data points from that facility assessment illustrate Otis School District's suitability as a BEST Grant candidate.

|                                    | OES    | OHS    |
|------------------------------------|--------|--------|
| CFI (Colorado Facility Index)      | 88.5%  | 100%   |
| RSLI (Residual Service Life Index) | 36%    | 15%    |
| FCI (Facility Condition Index)     | 74.82% | 71.90% |

Please note:

- Otis School District's Facility Condition Index (FCI) scores could be ranked significantly higher following appeals to the Facility Assessment findings;
- Otis School District's Colorado Facility Index (CFI) is 94.25% and is in the highest 1% in the entire state. The CFI reflects combined condition, suitability, and energy audit needs.
- Additionally, the State's Assessment Report for Otis School District shows the Residual Service Life Index (RSLI) for the 1922 and 1940 buildings is 0%; and
- The above data points strongly support the argument for new replacement facilities in the immediate future. The District is considered a prime candidate for BEST funds and the community remains supportive of yet another grant request.

History of Otis School District's previous grant submissions:

First Plan:

The District applied to remove the existing 1922 classrooms and 1940 auditorium buildings and replace them with an academically suitable addition to the north end of the existing to-remain structures. Minor remodeling and upgrades were also planned for portions of the 1962 addition of OHS.

Identified Red Flags:

- Building square foot per student too high;
- "History Colorado" interest in the 1922 building unresolved; and
- OES not included in the Master Plan.

Second Plan:

The Master Plan called for the removal of the existing 1922, 1940, and 1962 portions of OHS; a major remodel to the 1985 OES; new construction of a Jr/Sr high school and an activities wing connected to the present OES; and a remodel of the 1998 facility to convert it to transportation, maintenance, and district uses as proposed in the Master Plan.

Identified Red Flags:

- High SF p/Pupil – Due to this project being a renovation / addition to their existing elementary and keeping the 1998 facility, the SF per Pupil is higher than a new construction on vacant site would be.
- costs per square foot per pupil too high; and
- lack of a proposal that looked at building 'all new.'

Third Plan (TBD):

Otis is a community that stands united and strong in their common voice / message on behalf of the Otis School District. The community is well aware of the superb opportunity the BEST grant offers.

The District and the Community have aggressively pursued the grant through two other grant cycles (see above) and continue to make concerted efforts to 'learn' from previous attempts to find Otis R-3's best BEST plan.

Based on our growing vision for the district, the stakeholders in our project wish to look at **all** possible facility configurations which would put PK-12 into one building. In our conservative community, many individuals would like to see the district incorporate either the 2008 preschool building OR the 1998 high school addition and to construct 'new' high-quality academic and extra-curricular facilities around those features. Again, the community is open to **all** configurations.

To build / renovate the new school, the District plans to ask the community to vote on approving a \$2.4 million bond issue (contingent upon receipt of a BEST grant) to combine with a BEST Program grant from the State of Colorado.

Facilities Included in the Scope of Services

1. Otis Elementary School  
518 Dungan Street  
Otis, Colorado 80743  
Constructed: 1985  
Additions: Pre-school 2008  
Current Enrollment: 106  
Square Footage: 22,923sqf

Description of Facility: Brick and mortar  
Historical significance: none

2. Otis Jr/Sr High School

301 Work Street

Otis, Colorado 80743

Constructed: 1922

Additions: 1940 Commons Area, 1962 classrooms, offices, gymnasium and 1998 library, locker rooms, long distance learning classroom, vocational classroom and agricultural shop

Current Enrollment: 85

Square Footage: 60,036

Description of Facility: Concrete, brick and mortar

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, 21<sup>st</sup> century school facilities.

If the Owner intends to apply for grant funding the successful Candidate must accommodate the dates listed in the Project Schedule.

### 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 shall be included in the RFQ Submittal.***

#### **SECTION 1 – LETTER OF INTEREST**

A maximum two page letter of interest that includes a synopsis of the firm, business principals, distinguishing characteristics, approach to completing this project, primary contact information, and 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. (the Owner reserves the right to determine the acceptability of these individuals)
2. Provide all team members experience, background and responsibilities including resumes.
3. Describe your firms past experience with master planning and educational programming.
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 determine if a building should be remodeled or if 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. Show your ability/ approach to organize and meet schedules.
10. Identify master plans your firm has completed with a similar size and scope to the proposed project.
11. Demonstrate experience understanding and analyzing school operations, school programs, enrollment projections and demographic data.
12. Knowledge of LEED & CO-CHPS criteria and 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 and staffing in addition to the number of projects your firm currently has under contract or in negotiation does your firm have the capacity to complete this project? What percentage of your firm is currently involved in other projects?
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.

#### **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 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 CDE website;
  - e. Assistance with updating the Owner's CDE Facility Assessment through review comments;
  - 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 and/or CO-CHPS 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;

If the Candidate is interested in providing add alternate #1, please provide a narrative expressing your firms 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 firms 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 recommended 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 planning team has performed collectively.

## V. SUBMITTAL REVIEW & SELECTION PROCESS

The selection process consists of two phases, followed by negotiations with the apparent winner.

### Phase 1 – RFQ Review

The Owner’s Selection Committee will evaluate and score the RFQ submittals based on the selection criteria listed below:

| <b>Selection Criteria</b>   | <b>Max Point Possible</b> |
|---|---------------------------|
| Section 1: <b>Letter of Interest.</b> 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?        | 10 points                 |
| Section 2: <b>Experience and Qualifications</b> Provided a comprehensive and insightful experience and qualifications package which highlighted key personnel in addition to other items as stated.                       | 30 points                 |
| Section 3: <b>Scope of Services.</b> 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. | 30 points                 |
| Section 4: <b>Schedule.</b> Ability to complete the planning tasks within the timeframe needed. Submitted complete & understandable schedule.   | 25 points                 |
| Section 5: <b>References.</b> Candidate has provided a comprehensive project list with contact information for projects completed over the last five years.   | 5 points                  |
| <b>Total Points</b>   | <b>100 points</b>         |

### Phase 2 – Interview

An interview invitation will be sent out to the three Candidates with the highest RFQ/P submittal scores 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.

The apparent winner will be determined based on their interview score, which is separate from their RFQ/P submittal score.

## VI. FEE PROPOSAL

Shortlisted Candidates shall prepare a detailed fee proposal as outlined below. The fee proposal is to be submitted in a sealed envelope prior to the start of their interview. 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;
- ✓ 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;
- ✓ Hourly rates for all personnel involved in the project;
- ✓ 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: Both add alternate #1 and add alternate #2 are to 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

Only the fee proposal of the apparent winner will be revealed to the selection committee

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 the next highest-scoring Candidate.



## VII. Acceptance and Rejection

After the final selection has been made, the Owner will provide a summary of scores 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 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 is to be utilized and built upon in the assessment portion of the master plan.