



## REQUEST FOR QUALIFICATIONS/PROPOSAL (RFQ/P) FOR AN OWNER'S REPRESENTATIVE

### Lake County School District R-1

328 W 5<sup>th</sup> St

Leadville, CO 80461

Phone (719)486-6800

**PROPOSAL DUE DATE/DELIVERY REQUIREMENTS- 3:00 p.m. August 19, 2019**

**Deliver 1 electronic copy via email + 3 Original Copies to:**

### **Owner Contact - Paul Anderson**

328 W 5<sup>th</sup> St

Leadville, CO 80461

Phone (719) 293-0489

panderson@lakecountyschools.net

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 after the "Clarification Deadline", to all candidates who have notified the Owner Contact of interest. 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	08/05/2019
OPTIONAL Site Visit (10AM, 130 W. 12 th St. Leadville)	08/08/2019
RFQ/P Clarification Deadline (1PM)	08/09/2019
RFQ/P Clarification Responses (Noon)	08/13/2019
<b>RFQ/P Responses due (3PM)</b>	<b>08/19/2019</b>
Interview Invitations sent to Short-Listed Candidates	08/23/2019
<b>Interviews(Optional)</b>	<b>08/28, 30/2019</b>
Candidates Notified of Selection	09/04/2019
Contract Negotiations	09/09/2019
Decision Memorandum Sent to Unsuccessful Candidates	09/12/2019
<b>Notice to Proceed Given to Successful Firm</b>	<b>09/16/2019</b>
<b>Project Estimated Substantial Completion (Bond 11/19, Close 12/19, Build 6/20, Demo 6/22)</b>	

## **II. BACKGROUND**

### Owner Background

Lake County School District formed in 1877 and its boundary area is 384 square miles. The mission of the district is: "LCSD challenges students to reach their fullest potential through personal, engaged and rigorous learning in the classroom and beyond." LCSD serves all of Lake County and the county seat of Leadville, America's highest incorporated city at 10,200 feet in elevation. Economic drivers in our district include mining and tourism, both of which are subject to cyclical economic booms and busts. Lake County serves as a bedroom community for neighboring resort communities; approximately 70% of Lake County residents commute out of the county for work. Hispanic students account for 70% of the student population. English language learners are 43% of our students (in the top 3% in Colorado). The percentage of our students to qualify for free and reduced lunch is 64% (in the top 20% in Colorado). LCSD serves approximately 1,000 students with approximately 200 staff. The district maintains over 350,000 square feet of facilities.

### Project Description

The new school will serve all of our PK-2 students and will be 58,459 SF. The new school will be designed for modern security, energy efficiency, free of hazardous materials, conducive to 21st century learning, provide for teacher and student collaboration space and allow for all of our PK-2 students to learn under one roof. The site plan provides for an expanded, off-street parent drop off lane to allow for on-site queuing of vehicle traffic, moving the unsafe backup of cars off of the street during drop-off and pick up. Technology deficiencies will also be addressed with updated modern infrastructure with new servers, switches and wireless access points throughout the new facility, as well as new end-user devices for students. The district will analyze options as it relates to pursuing LEED, CO-CHPS or Green Globes and commits to pursuing one of these programs and targeting the certification level required by BEST. In addition to addressing the critical deficiencies identified of security, hazardous materials, water supply, sewer service & plumbing systems, heating system, structural systems, electrical systems, roof and building envelope, traffic safety, accessibility and interior systems at WPE that a new building would address, the visioning team recommended two program components they would like to see included in the new school: plan for future expansion and a larger gym space. Plan for the future: The recommendation of the visioning team was to plan thoughtfully for the future. They realize that in the next few decades, the Intermediate School (grades 3-6) will be nearing its end of life. The visioning team asked TreanorHL to plan a location for a future addition for grades 3-6 onto the new PK-2, so eventually the new PK-2 school could be converted into a PK-6 twenty or so years from now. The group felt having larger common spaces to accommodate the future addition was a fiscally responsible approach for this phase of the school construction. Adding onto common spaces would be more difficult and costly in the future. Gym Space: As part of the master plan, it was determined that the district did not have sufficient gym space to accommodate indoor events for students across the district. Because it can snow every month of the year in Leadville and temperatures can be below freezing much of the school year, the climate at 10,000' above sea level forces students to have recess time inside for the majority of the school months. A larger gym was recommended for both indoor recess programming and district wide use for students in grade levels PK-12. It was also thought that the community would be more likely to pass a bond if there was additional gym space that is in short supply in Leadville. Finally, to honor the recommendation of thoughtfully planning for the future, a larger gym space could accommodate a PK-6 school in the future without triggering an expensive expansion.

## **III. RFQ/P OBJECTIVE**

The purpose of this RFQ is to solicit a Qualified Owner Representative (Candidate) to contract with the Owner and also work closely with the CDE to provide customary owner's representative services for the pre-construction, construction, and post-occupancy phases of the project. In addition to providing customary Owner's Representative/Construction Management Advisor services, the Candidate will be responsible for ensuring the district's compliance with the terms of the BEST Grant, and the Sublease and Site

Lease requirements therein, throughout the course of the 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 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 firm’s 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. Consultant shall not change or substitute these individuals without prior approval. The Owner reserves the right to determine the acceptability of these individuals.
2. Provide all team members experience and responsibilities, including resumes. Provide background information including education, professional titles, related qualifications, specific roles in past projects.
3. Describe your firms past experience with providing Owner’s Representation, highlighting any projects with similar size and scope to the proposed project.
4. Provide your firms project organization structure and responsibilities.
5. How does your firm provide an in-depth cost evaluation of proposals, fees and budgets?
6. Show your ability/approach to organize, develop and maintain project schedules.
7. The project intends to use a multidisciplinary collaborative project approach. Describe your firm’s knowledge with an integrated design process.
8. Describe your firm’s knowledge of LEED & CO-CHPS criteria and program requirements.
9. Describe your firm’s understanding of commissioning, measurement and verification.
10. Understanding of the Owner, its organization and leadership.
11. 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?
12. This project requires the Candidate to carry, at a minimum, general liability insurance and worker’s compensation according to State laws.
13. Demonstrate experience with Bond Initiatives or Capital Campaigns in Colorado Public Schools.
14. Demonstrate ability to manage and develop a master budget and maintain it accurately throughout the project to ensure a quality project is delivered within budget.
15. Demonstrate a working knowledge in some or all disciplines including architectural design, structural engineering, mechanical engineering, electrical engineering, civil engineering, roof design and maintenance, construction cost estimating, facility management and maintenance, information technology (word, excel, accounting). Indicate which disciplines you are knowledgeable and have expertise and/or experience.

16. Provide description of any lawsuits or claims including status and resolutions.
17. Describe understanding of Bonding, Permitting and Insurance requirements for school construction.
18. Identify any other unique challenges/ approaches that you have experienced that will assist the Owner with a successful project.
19. Describe your firm's process for minimizing Owner's risk throughout a project.
20. What does your firm do to ensure a safe construction site?
21. Assisting the district with fund requests is an important role of this project. The requirements for this project include obtaining accurate invoices from consultants and vendors, and providing complete and thorough draw requests to CDE on behalf of the district in which each individual invoice is accurate as well as the total request. The OR will be submitting the funding request to CDE for approval, and responding to questions from CDE for clarification or inaccuracies. Please explain your experience regarding draw requests, the expectations you will set for your firm and for the consultants, contractor and vendors to ensure timely payment, and any lessons learned from past projects.
22. Please explain your firm's role in construction administration, including the observations and reporting your firm will complete for the project on behalf of the district. Please provide a sample of an OR field report from your firm.
23. Demonstrate experience and understanding of different delivery methods. Note what delivery method you would recommend for this project.

### **SECTION 3 – SCOPE OF SERVICES**

The Owner's Representative is expected to act on the owner's behalf in overseeing the project through completion and into occupancy. The candidate's proposed scope of services should include, but is not limited to, each item listed below. Please provide a narrative of your approach to providing the services below, and explicitly identify any additions or exclusions. When appropriate include the number of meetings, site visits, etc., and any other pertinent descriptions that clearly identify services included in the proposal.

#### **1. Owner's Representative Services**

Complete the Scope of Services Matrix provided as Exhibit A. The Candidate must validate each line in the exhibit by marking either provided or excluded.

### **SECTION 4 – SCHEDULE**

It is expected that your firm has the current capabilities and capacity to complete the project by the date listed in the project schedule. Provide a detailed schedule, including milestones, from the notice to proceed date through post-occupancy services. 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 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 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:

Selection Criteria	Max Point Possible
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 tasks within the timeframe needed. Submitted complete & understandable schedule.	15 points
Section 5: <b>References.</b> Candidate has provided a comprehensive project list with contact information for projects completed over the last five years.	15 points
<b>Total Points</b>	<b>100 points</b>

### Phase 2 – Interview (Optional)

If the selection committee deems necessary, 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 O/R team.

The interviews(optional) 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 O/R 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;
- ✓ Detailed statement of work;
- ✓ Confirmation that all scope items from the original RFQ/P will be addressed;
- ✓ Any exclusions with explanations;
- ✓ Breakout of fee by phase;
- ✓ # of hours anticipated;
- ✓ # of people anticipated;
- ✓ Other resources;
- ✓ How the resources are to be used;
- ✓ Breakout of anticipated reimbursables included in the lump sum 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;

The negotiated fee is anticipated to include all costs including reimbursables for the project resulting in a “lump sum” 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, which could be publically shared. 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.

As a condition of acceptance, and to avoid conflicts of interest, the selected Owner's Representative will not be permitted to submit proposals for additional consulting or contracting work on this project, regardless of qualifications.

## VIII. RFQ/P Supporting Material

**The following are provided for informational purposes in regard to the project:**

1. Lake County School District R-1 Facilities Master Plan provides background for the proposed project
2. Detailed Project Budget submitted with the BEST grant application
3. Preliminary Project Schedule submitted with the BEST grant application