

Billings Public Schools

Billings, Montana

Request for Qualifications for Facilities Master Planning Services

Billings Public Schools ("District") will be considering qualifications to provide facility master planning services from qualified consultant teams to assist the District with the preparation of a comprehensive Facilities master Plan, which has been named "Billings Public Schools 2018 Master Plan", to guide facilities planning and improvements for the next ten years. The plan will address short and long term District goals and objectives, and facilitate the Board of Trustees' ranking of priorities and consideration of future facility investments and improvements.

The District seeks a variety of master planning services including: a high level assessment of the current facilities, space planning and utilization, facilities management, programming for current K-5/6-8/9-12 educational models, public meeting facilitation, conceptual architectural designs, preliminary cost estimating and cost benefit analysis for options including changes of use, new construction, property assessment, and remodeling. Consultants should have experience in facilities master planning for educational facilities and in facilitating innovative and collaborative solutions to the District's needs.

At the District's discretion, the consultant appointment may also lead into a potential medium to large scale project of a yet-to-be determined scope of work, cost, and schedule. The scope of the project will be determined based on multiple factors including funding success, obtainable priority need as identified in the master plan process, and the District's desire to continue with the selected consultant. The project scope may include renovating of existing facilities, and/or an addition to an existing facility, or even a new construction project.

The community and District input to the master Plan should be completed by March 5th, 2018. A wide range of input from community members, the City of Billings, and District staff, teachers, and parents is anticipated to identify and evaluate alternatives, as described in the Request for Qualifications (RFQ). The submittal is intended to provide a framework for qualifications which identify key stakeholders, issues and tasks. Respondents may propose alternative approaches which achieve similar goals by clearly identifying any changes from the scope of services in the RFQ and the rationale for the proposed alternative approach, including time or cost savings.

INTRODUCTION and BACKGROUND

Billings Public Schools consists of 32 Schools: 22 elementary schools, 6 middle schools, and 3 high schools plus a high school career center which focuses on career technical education (CTE). In addition the District has a central office for its administrative staff plus Adult Education and other alternative classroom settings.

In 2013 the community passed a \$122.3 million elementary District bond which was for the construction of two new middle schools, renovation and expansion of two historic elementary schools, and completed a portion of an estimated \$120 million in deferred maintenance throughout the District. In the past 5 years the District has completed a facilities master plan (including building footages and building space program utilization under K-6 model), completed a comprehensive roof planning

handbook, preliminary deferred maintenance summary, and performed a demographic study, all of which was presented to the Board of Trustees.

Further work in the District's demography will be performed concurrently with a separate RFQ to be issued simultaneously with this master Plan RFQ. Estimates on deferred maintenance for the District's facilities have been estimated as high as \$120 million with a portion of this being accomplished with the 2013 bond proceeds. An updated deferred maintenance schedule will be a requirement of this scope of work. The District's current bonding capacity is +/- \$76 million Elementary and +/- \$262 million High School.

The District will be engaging a firm(s) to complete a comprehensive Facilities Master Plan that utilizes ties in pertinent aspects of previous reports, studies and identified work completed.

FACILITIES MASTER PLAN GOALS

The successful professional will provide the following Measurable Objectives, including:

1. Recommend and define the facilities needs to support and enhance the District's strategic goals and programs in the high school and elementary districts based on Board of Trustees priorities and District-wide initiatives, and;
2. Focus on identifying opportunities to use available space more efficiently, reviewing the technology infrastructure and with a focus on alignment with future educational delivery methods and programming for K-5 elementary, 6-8 middle school, 9-12 high school models, utilizing staff, previous information, available reports and completed work;
3. Complete high school planning, identify opportunities to use available space more efficiently, review technology infrastructure, and focus on alignment with future educational delivery methods including emphasis on the District's career technical educational facility to be renovated/replaced to accommodate a full high school curriculum while improving specific CTE curriculum academics and programming needs, utilizing District staff and previous information and reports. This would include potential undeveloped properties to accommodate space needs if existing facility cannot effectively support program needs;
4. Review and update all deferred maintenance for the High School District, with District staff;
5. Review and update all deferred maintenance for the Elementary District with District staff;
6. Compare previous reports and completed work with District staff to develop a definitive facilities project list;
7. Identify and evaluate costs and benefits, working with District staff, on a broad array of options to meet current and projected facility needs;
8. Define a strategy that addresses the needs for short and long term facility improvements and capital investments building on completed work identified in the 2013 Master Plan, working with Staff. This would include undeveloped District property;
9. Incorporate the new demographics study in overall District planning, with District staff.
10. Incorporate the current Daylis Stadium Master Plan, completed in 2016, including updated cost analysis.
11. Define implementation steps necessary to fulfill the identified needs, coordinating the scope of work with funding sources to create a 10-year schedule of work to be completed District-wide;

SCOPE OF DESIRED SERVICES

PHASE 1 – COMMUNITY INVOLVEMENT IN A FACILITIES MASTER PLAN PROCESS

An important component of the Facilities Master Plan process will have strong community involvement and will engage District staff, teachers, parents, and the community in identification of issues and needs and to evaluate options, qualifications and priorities.

While the selected firm will consult on the overall process to engage all the key stakeholders and to develop meeting schedules and coordinate agendas, the District will initiate a Community Outreach Committee to identify the appropriate participation for these constituent groups and develop a scope and sequence that aligns with the District's planning goals. The selected firm will work with the District to add to that group as required and begin outreach activities and meetings that will provide key input throughout the planning process.

TASK 1.1 Develop stakeholder involvement process.

TASK 1.2 Schedule and provide materials for District and Community Involvement.

PHASE 2 – FACILITY ASSESSMENT

Using existing data, reports, the completed 2013 master planning work, and working with staff:

TASK 2.1 Evaluate building and utility infrastructure condition and energy efficiency.

TASK 2.2 Identify current facility space deficiencies.

TASK 2.3 Draft a detailed Facilities Assessment.

PHASE 3 - FACILITIES MASTER PLAN, REQUIREMENTS AND OPTIONS

TASK 3.1 Articulate key goals and guiding principles of the Facilities Master Plan (to include building/improving on previous master planning and completed work).

TASK 3.2 Determine Facility needs associated with the Strategic Plan and Board Priorities.

TASK 3.3 Identify current and potential joint use partnerships.

TASK 3.4 Consider current trends in public school curricula, State and Federal requirements, new teaching technologies and other curriculum influences that improve the overall pedagogy of the District's instruction, including refinement/support of current K-5, 6-8 and 9-12 grade model programming.

TASK 3.5 Identify facility needs associated with programs to assist disadvantaged students.

TASK 3.6 Examine demographic factors and developments in order to project enrollment trends and identify key variables which may influence facility needs.

TASK 3.7 Evaluate and consider specific facility needs to operate the District's current Career Center building for a full four year academic high school program, while improving the current career technical education instructional opportunities. This would include a

detailed assessment of function and cost of the current facility for renovation/addition or replacement on the current facility site.

TASK 3.8 Work with the District and selected demographic firm to fully develop current and future program and facility requirements.

TASK 3.9 Incorporate current Daylis Stadium Master Plan completed in 2016.

PHASE 4 – DRAFT FACILITIES MASTER PLAN QUALIFICATIONS

TASK 4.1 Proposed plan for renovation or additions to existing facilities

TASK 4.2 Identify potential renovation/addition or replacement for full 9-12 academic high school program and CTE curriculum instructional space at the current Career Center facility.

TASK 4.3 Increase sustainability and energy/resource conservation and potential life cycle improvements within the existing facilities.

TASK 4.4 Identify current backlog of deferred maintenance for all facilities

TASK 4.5 Present cost/benefit assessments and information to the Board of Trustees

TASK 4.6 Include in Master Plan current Daylis Stadium Master Plan with updated costs.

TASK 4.7 Draft a comprehensive Facilities Master Plan document

TASK 4.8 Board of Trustees review and provide further direction on plan proposal.

PHASE 5 – PLAN ADOPTION AND IMPLEMENTATION

The final phase of the Master Plan process includes formal adoption and implementation. Decisions about specific tasks and the scope of each of the following tasks will depend upon Board review and approval of the Draft Master Plan prepared in Phase 4. Possible tasks are described with input from consultants responding to the RFQ with the understanding that the scope may change depending upon Phase 4 review.

TASK 5.1 Prepare final project list incorporating any feedback received during Phase 4.

TASK 5.2 Ensure that all recommendations are in compliance with Local, State and Federal codes and laws.

TASK 5.3 Adopt Facilities Master Plan.

TYPE OF CONTRACT

It is the District's intent to enter into a negotiated "LUMP SUM" contract for providing these planning services. Strict adherence to the budget limitations will be required, and budget limitations will be established for each phase of the work.

1. Community involvement
2. Facilities Assessment
3. Facilities Master Plan; Requirements & Options
4. Facilities Master Plan

5. Adoption and Implementation

Selected firm(s) will be required to enter into a written contract in a form substantially in compliance with the District's standard contract format for consultants, as approved by its legal counsel.

Selected firm(s) shall comply with the District's insurance requirements.

The District reserves the right to negotiate the scope, schedule and cost of any qualifications submitted and enter into a contract based on revised qualifications and determined to be in the best interest of the District.

All submittals by each respondent shall be printed or typewritten on no larger than 8 ½ x 11 paper and no more than 75 pages in total. Submittals must be signed and dated by a representative of the submitting firm, and who is authorized to contractually bind the firm. Corrections must be initialed in ink by the person signing the qualifications. No telegraphic, electronic, email or facsimile will be accepted. Costs for preparing the submittals are the responsibility of the proposer and shall not be charged in any matter to the District.

As previously mentioned, performance of these services may lead into a potential medium to large scale project of a yet-to-be-determined scope of work, cost, and schedule. The scope of the project will be determined based on multiple factors including funding success, priority needs as identified in the master plan process and the District's desire to continue with the selected consultant. The project scope may include renovation of existing facilities, and/or an addition to an existing facility, or even a new construction project.

The District reserves the right to pursue subsequent selection processes for any future project(s) at its sole discretion should funding efforts be successful.

REQUIRED ELEMENTS

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| Section 1 | Share a brief history of the prime consultant firm. |
| Section 2 | <p>Provide your proposed organization chart including the names of individuals to be involved in the program. Include resumes/qualifications/relevant experience of these individuals. Specifically, include the work history of these individuals with this specific firm. Indicate any relevant licensing and certifications, ongoing commitment to professional education of staff, total number of permanent employees, and any other data that may assist the District evaluation team in understanding your qualifications, depth and expertise.</p> <p>Provide the names of firms and individuals that will perform any sub-consultant work for your firm (i.e. outside firms providing cost estimating, planning, architectural design, structural, mechanical or electrical engineering services, etc.). Provide qualifications/experience for each person to be involved in the program. Include a list of the in-house design disciplines your firm provides.</p> |
| Section 3 | References – supply the names, address, and telephone number of five previous clients for similar projects you have successfully completed. Provide a list of references for projects which your firm, and your sub-consultants, have performed collectively. |

Supply photos and literature on related similar projects done by individuals listed in section 3. Do not include projects completed by other branch offices or by individuals that are not part of this proposed program organization chart.

Address any involvement your firm, or proposed sub-consultants, have had in lawsuits in relation to fiduciary, consultative, and/or construction related matters, whether as plaintiff or as defendant. Provide specifics and outcome.

- Section 4 Detail your firm's recommended or specific approach for accomplishing each item in the section "Scope of Desired Services."
- Section 5 It is the intent of the District to complete the Facilities Master Plan by the end of March 2018. Provide a detailed schedule for the work and demonstrate you firm's ability to meet this schedule. Include the timing of public review of the Draft plan and actual adoption of the Facilities Master Plan.
- Section 6 Describe how your firm manages and controls planning & design costs, prevents project scope increases and is able to provide the highest quality design & planning in relation to fees.
- Section 7 Provide other supplemental information that is not specifically addressed in previous sections, and which would augment your firm's qualifications for this project; however the District is not obligated to consider any information not specifically requested in this RFQ.

PRE-SUBMITTAL CONFERENCE

A pre-submittal conference for interested parties is scheduled for July 21, 2017 at 2:00 pm, at Billings Public Schools Facilities Services, located at 101 10th Street West, Billings, MT 59102. Questions shall be submitted by email to reiters@billingsschools.org, and received no later than July 20, 2017, at 3:00 pm, and will be answered at this conference. Do not request individual meetings or tours.

QUALIFICATIONS SUBMISSION

Furnish Ten (10) copies of the qualifications, spiral bound, in an opaque envelope addressed to:

Billings Public Schools
Scott Reiter, Director of Facilities
101 10th Street West
Billings, MT 59101

Submittals must be received by no later than 2:00 o'clock PM MDT, on July 31st, 2017

Late Submittals will not be accepted

OWNERSHIP OF QUALIFICATION DOCUMENTS

Upon receipt of qualifications documents, all such documents shall become property of the Billings Public Schools.

SUBMISSIONS SUBJECT TO PUBLIC DISCLOSURE

All documents submitted will become public once the District completes negotiations and selects the firm(s). Any "trade secrets," proprietary, or other confidential information may be exempt from disclosure but only if such designated portions of the RFQ that so qualify are clearly designated as "PROPRIETARY TRADE SECRETS" on the RFQ form will otherwise qualify as propriety and confidential, as determined by the District based on applicable laws. An assertion by the proposer that the entire Qualifications is exempt from disclosure will not be honored.

Selection Process

Submissions will be assessed by a District appointed selection committee on the following objective/subjective scale. A maximum of three (3) candidates with the highest numeric scores will be "shortlisted" and invited to interview at the District's facility with the selection committee. Unsuccessful candidates will be notified immediately after the selection process is complete. After Board approval of the committee selection, the District will enter into negotiations with the highest ranked candidate. If negotiations are unsuccessful with the highest ranked candidate, the negotiations will be terminated and started anew with the second ranked finalist, and thus, until a suitable agreement can be reached.

Depending on the number and quality of submittals received, the District reserves the right to make the selection of the preferred firm based on the submittal information alone, and may decline to conduct the interview stage of the selection process.

Numerical Evaluations and subsequent selection of written submittals per MCA 18-8-204:

1. Experience with projects of similar size and scope in this region – 25 pts.
 - Experience with school facility planning and design
 - Familiarity with best practices in sustainable design and planning of school facilities
 - Creativity in problem solving, design and planning.
 - Skill in facilitating complex community District involvement processes
2. Key team member qualifications and experience – 25 pts.
3. Capability to meet time and project budget requirements – 15 pts.
 - Ability to cost effectively provide high quality planning and design services
 - Ability to accurately estimate scope of facilities evaluation, design, construction work and all associated costs with the project.
4. Local professional resources to be utilized for this effort – 15 pts.
5. Recent and current work for Billings Public Schools – 15 pts.
6. Current and projected workloads – 5 pts.

Timeline for review and selection as follows:

Submission of firms Qualification's due:	July 31 st , 2017 @ 2 PM, MST
Review/shortlist RFQ's by the District:	August 1 st – 7 th , 2017
Interview shortlisted firms:	August 10 th , 2017
Notice to the public of rankings	TBD
Selection:	Board approval; begin negotiations with highest ranked firm

RIGHTS OF SELECTION AND ASSIGNMENT

The District reserves the right to:

- 1) Waive or modify any submission requirements specified in this Request for Qualifications, to waive informalities or minor irregularities, and to request additional or supplemental information from any firm, and;
- 2) Evaluate proposals and award the project as determined with the District's sound discretion to be in the best interest of the District, and;
- 3) Conduct a background check on any firm submitting qualifications which may include contractual and business associations and practices, employment histories, and reputation in the public school and business community. By submitting qualifications, a firm consents to such inquiries and agrees to make available such documents and records necessary to assist in the inquiry, and;
- 4) Select one or more firms for this work, but reserves the right to terminate the solicitation and or evaluation process at any time, and;
- 5) Reject or request modifications to any and all proposals, and;
- 6) Assign a specific project or aspect to a specific firm, and, finally;
- 7) Assign to one or more firms one or more of the following components:
 - a) Community Outreach
 - b) Facility Assessment
 - c) Facility Requirements and Options
 - d) Facility Master Plan
 - e) Implementation

Any questions related to this RFQ should be submitted in writing to Scott Reiter, Director of Facilities, Billings Public Schools, 101 10th Street West Billings, MT 59101 or by email: reiter@billingspublicschools.org. Questions will be answered at the pre-submittal conference on July 21, 2017, at 2:00 pm.

APPLICABLE LAW

This RFQ shall not commit the District to enter into any agreement, to pay any expenses incurred in preparation of any response to this request, or to procure or contract for any supplies, goods or services. The District reserves the right to accept or reject any and all responses received as a result of this RFQ if it is in the District's best interest to do so. By offering to perform services under this

procurement, proposers agree to be bound by the laws of the State of Montana, including but not limited to: applicable wage rates, gross receipts taxes, building codes, Equal Opportunity Employment practices, safety, etc.