

# **SANTIAM CANYON SCHOOL DISTRICT**

## **REQUEST FOR PROPOSALS**

### *Santiam Canyon School District Long Range Facilities Planning*

CONTRACT ADMINISTRATOR:

Santiam Canyon School District

Todd Miller

Phone: 503-897-2321

Email: [todd.miller@santiam.k12.or.us](mailto:todd.miller@santiam.k12.or.us)

<http://www.santiam.k12.or.us/>

ISSUE DATE: **October 28, 2016**

RFP CLOSING (DUE) DATE: **November 18, 2016**

**NO LATE RESPONSES WILL BE ACCEPTED**

#### SUBMITTAL LOCATION

Santiam Canyon School District

Attention: Todd Miller

PO Box 197, 150 SW Evergreen St, Mill City, OR 97360

## Introduction:

Santiam Canyon School District (the “District”) is a rural school district east of Salem in Mill City, serving students from Mill City, Gates, Detroit, Idanha, Marion Forks and the areas of Breitenbush and the Little North Fork. Our campus is tightly fit in contiguous spaces with two school buildings: Santiam Elementary School (K-6) and Santiam Junior/Senior High School (7-12).

An overview map of the District campus is below, with the property lines outlined in yellow.



The District had a Facilities Feasibility Study conducted in 2001 and is currently being updated now. This information will contain major repairs needed within the current buildings and possible costs associated with these projects. This information will become available to the selected contractor when it is completed.

With the assistance of the District and a Long Range Facilities Planning Committee, develop a Long Range Facilities Plan (LRFP) which will guide facilities expenditures and timeframes and set the direction for investment in school facilities which will provide the best learning environment for the District’s students.

The LRFP will be the District’s Master Plan and become the foundation of the District’s annual maintenance plan, operations plan, capital budget and long range facility renovation program and will also fulfill the requirements of ORS 195.110.

## **Informal Selection Process:**

Pursuant to OAR 137.048.0210, the District shall use the informal selection procedure described in this solicitation to contract with a consultant when the Estimated Fee is expected to not exceed \$150,000.

## **Scope of Work:**

- **Introductory kick off meeting with staff to discuss outcomes, process, goals, etc.**

Consultant will participate in a kick off meeting with District staff to discuss process, anticipated outcomes, roles, community engagement goals, schedule and budget.

- **Long Range Facility Plan Committee (LRFPC) Meeting planning**

Consultant will plan each meeting in conjunction with District staff. Meeting planning may include creating agendas, ensuring pertinent background information is available, including discussion papers detailed below, and provided to the LRFPC in advance of meetings, clearly identifying goals and outcomes for each meeting, etc.

- **Long Range Facilities Planning Committee (LRFPC) outreach**

District leadership will invite individuals to participate in LRFPC meetings. Invitations will include hours of commitment, anticipated outcomes, roles, expectations, etc. Consultant will prepare meeting reminders and meeting materials for LRFPC participants. District will send all written communications to members.

- **Facilitation (five to seven - two hour meetings)**

Consultant will prepare for and facilitate approximately five to seven LRFPC meetings. Each meeting will focus on selected topic areas of discussion and will provide opportunity for public comment.

- **Development of discussion papers**

LRFPC meetings will center on discussion of specific issues, which will be determined in advance. Key topics of the LRFP will be discussed through a series of white papers. Consultant is responsible for development of these white papers, outlining the key issues, background and options that the LRFPC will discuss and ultimately recommend a direction/decision point.

- **Note taking and summaries for each meeting**

Consultant will provide note taking staff during each meeting and provide summaries for each meeting including attendees, discussion, comments, main themes and next steps. Consultant will prepare and deliver these summaries to District staff for one review then revise for quick turnaround for publication/dissemination by the District.

- **Bi-weekly planning meetings (as requested)**

Consultant will meet with District staff twice a month to discuss progress, feedback received, process and next steps.

- **Plan for broad public input**

Consultant will work with District staff to assist with public participation goals, objectives and tools to solicit broad public input into the draft LRFP.

## **ORS 195.110 - REQUIRED TOPIC AREAS**

Santiam Canyon School District is preparing a Long Range Facility Plan which would be compliant with ORS 195.110. The plan will likely include discussion/consideration of the following topics:

### **Update/validate enrollment projections by school age group through 2025**

Document the methodology used to determine school enrollment forecasts and obtain agreement with Facilities Planning Advisory Committee (LRFPC) on enrollment forecast methodology. Review school site size. Develop parameters for elementary, middle and high school site sizes.

### **Determine/validate school capacity formula**

Develop objective criteria to determine whether adequate student capacity exists at each school. The local jurisdiction will need to adopt the criteria before it can be applied. Other activities related to this task include researching similar sized school districts to determine the school capacity formulas/methodologies they use to calculate school capacity, consider methods for more efficient use of schools, identify needed improvements to existing District facilities based on the agreed upon school capacity, etc.

### **Identify instructional changes that may have impact on facilities**

Identify program/curriculum changes that will impact school facility needs. Special education, full-day kindergarten, English as a second language, international baccalaureate programs and physical education program needs may place new or different demands on school facilities. The original program and grade configuration for some schools may be different than current use.

### **Identify alternatives to construction, financing options, future land needs for facilities**

Identify and consider alternatives to school facility construction, financing options to fund future capital construction and the District's future land needs to accommodate new facility construction.

### **Review school condition assessments and confirm needed improvements to existing facilities**

The District will separately prepare Facility Condition Assessments. Consultant team will review and confirm the accuracy of the FCA/FCI provided. Develop a methodology for updating the facility condition assessment of some or all District facilities.

## **Consultant Deliverables:**

Develop with staff input and direction:

- Background pieces to be included in work notebooks for LRFPC members.
- Provide 12 copies of notebooks and all materials for meetings. Meeting site supplies and materials to include easels, chart packs, and white boards as necessary.
- Draft LRFP by Spring 2017, which can be used to solicit general public comment and
- Board work session.
- Finalize the LRFP for Board of Education review by April 28, 2017.

## **Selection Process:**

This Request for Proposals (“RFP”) and the selection process will be conducted pursuant to the terms of this RFP and the Oregon Attorney General's Model Rules for Consultant Selection, OAR Chapter 137, Division 48.

## **Compensation:**

Compensation will be based on a total “not-to-exceed” amount for services and reimbursable expenses, with “not-to-exceed” maximums for the following individual phases of the design: Pre-Design/ Schematic Design, Design Development, Construction Documents, Bidding, and Construction Administration services, including record documentation. The amount of compensation will be negotiated with the Apparent Successful Proposer.

## **Proposal Requirements:**

**Cover Letter** A cover letter is required and shall not be longer than one page and shall not be numbered or included as part of the maximum number of pages.

**Firm Description and Experience** (20 points) Provide a brief description of your firm’s history, type of similar work you have done, and capabilities. Provide the location of the office where these services will be provided. List key point of contact and project manager who will be responsible for working with the District throughout the planning effort. Describe your team’s organizational structure.

Describe your team’s experience in long range facility planning and local land use processes. Describe your experience in dealing with local jurisdictions and specifically those relevant to this project. Provide examples of two projects completed in the past five years that reflect the capabilities of the firm relevant to long range facilities planning.

**Personnel Qualifications and Experience** (15 points) Identify the key personnel in your firm who will be assigned to this project and give examples of their experience with similar long range facilities planning. Describe their role, capabilities, education, licenses and certifications, and experience with similar long range facilities planning. Identify the sub-consultants and their key personnel that you propose to use on this project. Describe their recent (past 5 years) experience, their specific role, your firm’s role in each of the sub-consultant’s projects.

**Approach** (20 points) This process needs to be more than a technical plan, it needs to include an education vision for how Santiam Canyon can move forward with a plan to meet the future needs of its students. Describe your firm’s knowledge and understanding of the project and your overall approach to complete the District Long Range Facilities Plan. How will you organize this effort and how many meetings do you believe necessary. Describe the topical papers you will produce and your approach to completing them. Identify what you will need from the District in order to deliver a completed LRFP. Generate a proposed schedule by topic which assumes committee meetings beginning in December 2016. Describe the deliverable that will be the outcome of the long range facilities planning process.

**Experience with Community Engagement** (20 points) Describe your firm’s knowledge and experience working with relevant jurisdictions and your methodology for engagement of the stakeholders in the long range facilities planning process. Provide examples of leading focus groups, conducting surveys, facilitating stakeholder discussions, graphic communication tools, and presentations.

**MWESB Participation** (10 points) Santiam Canyon School District is dedicated to encouraging and awarding contracts to Minority-owned, Women-owned, and Emerging Small Business Enterprises (MWESB). Regarding your firm, please describe the ownership of your firm and whether or not your firm is certified by the State of Oregon as MBE, WBE, or ESB. Provide certification number if applicable. Provide your work force demographics (number of employees, race, and gender) and the measurable steps taken to ensure a diverse workforce including company policies and practices that promote the hiring and retention of women and ethnic minorities. Provide a history of contracting/subcontracting with MWESB certified firms. Provide your strategy on how you plan to address and incorporate MWESB participation on this project.

**Fees** (15 points) Provide your project team's hourly rates for each member including clerical support. Complete and include Attachment D based on a budget 'Not-to-Exceed an amount' proposed by consultants.

**References** Provide the name, address, email, and phone number for three client references of similar projects who are knowledgeable about your process and work product. Santiam Canyon School District may check with these references and/or may check with other references associated.

### **Evaluation Criteria:**

Proposals will be evaluated on the criteria listed in the *Proposal Requirements* section of this document using the points assigned in that same section.

### **Evaluation Process:**

The selection committee will score each submittal on the basis of responses to the evaluation categories. Submittals will be rated based upon the weights assigned to each item as noted in the parentheses.

Each member of the evaluation committee will rank each firm in each category between 0 and 5, and multiply that number by the weight assigned to the category. The individual evaluation committee members will then total the weighted score from all of the criteria to obtain the total score. The result of this total score will be used to rank all respondents.

The RFP also requires reference information for your firm. The District will utilize this information and any other independently obtained references that can provide background on the firm. This information will not be separately scored, but results obtained from these and/or other reference checks will be utilized in evaluating and scoring in the other categories and in the final ranking.

The evaluation committee will meet and use the individual evaluation committee member rankings as a beginning of their discussion. The discussion of the responses will include firm strengths and weaknesses and the individual evaluation committee member scorings. The committee reserves the option to interview finalists as ranked from the results of the evaluation committee discussion and scoring. The committee reserves the right to seek clarification of each proposal.

### **Selection Procedure and Timetable:**

The selection procedure described below will be used to evaluate the capabilities of interested firms to provide the professional services to the District for this Project.

October 28, 2016	Issue RFP
November 7, 2016 at 9:00 am	Non-Mandatory Pre-Proposal Site Visit
November 10, 2016 at 4:00 pm	Questions and Clarifications due
November 14, 2016	Owner's written response to questions
November 18, 2016 at 2:00 pm	RFP response due
November 28, 2016	Optional Interviews with Selection Committee
November 30, 2016	Notice of Intent to Award
December 8, 2016	District Finalizes Contract

The District reserves the right to negotiate a final contract that is in the best interest of the District. The District reserves the right to award multiple contracts for work outlined in this RFP. The District also reserves the right to reject any or all Proposals and may cancel the RFP at any time if doing either would be in the public interest as determined by the District.

**Responsibility Evaluation:**

The District will investigate a proposer's responsibility and will consider information obtained from any source as part of its evaluation, at any time prior to execution of the contract. Submission of a signed proposal constitutes the proposer's approval for the District to obtain any information the District deems necessary to conduct the evaluation including, but not limited to, credit reports and information discovered during reference checks.

**Submission:**

Submit five (5) copies of your written proposal to be received by the closing date and time listed in this document to:

Todd Miller, Contract Administrator  
 Santiam Canyon School District  
 PO Box 197  
 150 SW Evergreen St  
 Mill City, OR 97360  
 Phone: 503-897-2321

Your response must be contained in a document not to exceed fifteen pages (15 pages) single-sided pages including pictures, charts, graphs, tables and text the firm deems appropriate to be part of the review of the firm's response. Resumes of key individuals proposed to be involved in this project are exempted from the 15-page limit and should be appended to the end of your response. No supplemental information to the 15-page Proposal will be allowed. Appended resumes of the proposed key individuals, along with a transmittal letter, table of contents, front and back covers, and blank section/numerical dividers, etc., will not be counted in the 15-page limit.

Information shall be presented in the same order as the above evaluation criteria. The basic text information of the response should be presented in standard business font size (minimum 10-point), and reasonable (prefer 1 (one) inch) margins. Your response must be signed by an officer of your firm with the authority to commit the firm.

The District may reject any submittal not in compliance with all prescribed public bidding procedures and requirements, and may cancel this solicitation or reject for good cause, all responses upon finding by the District that it is in the public interest to do so.

Please note that throughout this Project, the District will not accept responses or queries that require the District to pay the cost of production or delivery.

**Telephone, facsimile, or electronically transmitted submittals will not be accepted. Responses received after the closing date and time will not be considered.**

### **Questions:**

All questions and contacts with the District regarding any information in this RFP must be addressed in written form to the Contract Administrator at the address, email listed in this document.

### **Change or Modification:**

Any change or modification to the specifications or the procurement process will be in the form of an addendum to the RFP and will be made available to all firms via email from the Contract Administrator. No information received in any manner different than as described herein will serve to change the RFP in any way, regardless of the source of the information. Any request for clarification or change or protest of anything contained in an addendum must be received by the date and time stated in the addendum, or they will not be considered.

### **Selection Protests:**

Any respondent to this RFP who claims to have been adversely affected or aggrieved by the selection of a competing respondent may submit a written protest of the selection to the Contract Administrator at the following address within seven days after notification of that selection:

Todd Miller, Contract Administrator  
Santiam Canyon School District  
PO Box 197  
150 SW Evergreen St  
Mill City, OR 97360  
Phone: 503-897-2321  
Email: [todd.miller@santiam.k12.or.us](mailto:todd.miller@santiam.k12.or.us)

Any such protests must be received by the Contract Administrator no later than seven days after the notification of selection has been made in order to be considered. The selection decision notification will be made by the Contract Administrator via email.



## **Proprietary Information:**

The District will retain this RFP and one copy of each original response received, together with copies of all documents pertaining to the award of a contract. These documents will be made part of a file or record, which will be open to public inspection after responder selection and award is announced. If a response contains any information that is considered a trade secret under ORS 192.501(2), mark each sheet with the following legend: "This data constitutes a trade secret under ORS 192.501(2), and must not be disclosed except in accordance with the Oregon Public Records Law, ORS Chapter 192."

The Oregon Public Records Law exempts from disclosure only bone fide trade secrets, and the exception from disclosure applies only "unless the public interest requires disclosure in the particular instance". Therefore, non-disclosure of documents or any portion of a document submitted as part of a response may depend upon official or judicial determination made pursuant to the Public Records Law.

In order to facilitate public inspection of the non-confidential portion of the response, material designated as confidential must accompany the response, but must be readily separable from it. Prices, makes, model or catalog numbers of items offered, scheduled delivery dates, and terms of payment will be publicly available regardless of any designation to the contrary. Any response marked as a trade secret in its entirety will be considered non-responsive and will be rejected.

## **Certification of Compliance with Tax Laws:**

By submission of your proposal, the signatory (a duly authorized representative of the submitting firm) must certify that the firm is not, to the best of their knowledge, in violation of any Oregon tax law. For purpose of this certification, "Oregon Tax Laws" means a state tax imposed by ORS 320.005 to 320.150 and 403.200 to 403.250, ORS Chapters 118, 314, 316, 317, 318, 321 and 323; the elderly rental assistance program under ORS 310.630 to 310.706; and local taxes administered by the Oregon Department of Revenue under ORS 305.620.

## **ESB/MBE/WBE:**

The District is committed to increasing opportunities for Emerging Small Businesses and Minority and Women Owned Businesses, and the District strongly encourages its consultants to utilize these businesses in providing services and materials for the District contracts and projects.

## **Enclosures:**

Attachment A- Proposers Certifications and Representations

Attachment B- Budget Worksheet

Attachment C- Proposal Content and Scoring

**End of RFP**

**ATTACHMENT A**  
**PROPOSERS CERTIFICATIONS AND REPRESENTATIONS**

The undersigned hereby certifies that Proposer:

1. Has the authority and/or responsibility to submit a proposal and to represent the organization in all phases of this RFP process.
2. The information is true and accurate to the best of their knowledge.
3. Shall furnish, within the time specified, the items/services as indicated in the RFP, Resultant Contract and the Proposers Submittal.
4. Is a  Resident Proposer,  Non-Resident Proposer, as defined in ORS 279A.120, of the State of Oregon, and has not discriminated against any minority, women, or emerging small business enterprises in obtaining any required subcontracts, in accordance with ORS 279A.110.

ORS 279A.120 (2) states "For the purposes of awarding a public contract, a contracting agency shall:

- (a) Give preference to goods or services that have been manufactured or produced in this state if price, fitness, availability and quality are otherwise equal; and
- (b) Add a percent increase to the bid of a nonresident bidder equal to the percent, if any, of the preference given to the bidder in the state in which the bidder resides."

"Resident bidder" means a bidder that has paid unemployment taxes or income taxes in this state during the 12 calendar months immediately preceding submission of the bid, has a business address in this state and has stated in the bid whether the bidder is a "resident bidder". (ORS 279A.120 (b))

"Non-resident bidder" means a bidder who is not a "resident bidder" as defined above. (ORS 279A.120 (a))

5. Understands any false statement may disqualify this proposal from further consideration or be cause for contract termination.
6. Understands by submitting this RFP Proposal, the undersigned certifies conformance to the applicable Federal Acts, Executive Orders and Oregon Statutes and Regulations concerning Affirmative Action toward equal employment opportunities. All information and reports required by the Federal or Oregon State Governments, having responsibility for the enforcement of such laws, shall be supplied to the District upon request for purposes of investigation to ascertain compliance with such acts, regulations, and orders.
7. Has not discriminated and will not discriminate against minority, women or emerging small business enterprises in obtaining any required subcontracts, and that the Proposer is not in violation of any discrimination laws.
8. **CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS - The Proposer certifies to the best of its knowledge and belief that neither it nor any of its principals:**
  - a. Are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from submitting bids or proposals by any federal, state or local entity, department or agency;
  - b. Have within a five-year period preceding the date of this certification been convicted of fraud or any other criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) contract, embezzlement, theft, forgery,

- bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- c. Are presently indicted for or otherwise criminally charged with commission of any of the offenses enumerated in paragraph 2. of this certification;
  - d. Have, within a five-year period preceding the date of this certification had a judgment entered against proposer or its principals arising out of the performance of a public or private contract;
  - e. Have pending in any state or federal court any litigation in which there is a claim against proposer or any of its principals arising out of the performance of a public or private contract; and
  - f. Have within a five-year period preceding the date of this certification had one or more public contracts (federal, state, or local) terminated for any reason related to contract performance.

**Where Proposer is unable to certify to any of the statements in this certification, Proposer shall attach an explanation to their offer. The inability to certify to all of the statements shall not necessarily preclude Proposer from award of a contract under this procurement.**

9. Acknowledges Receipt of Addenda No's. \_\_\_\_\_ through \_\_\_\_\_ inclusive.

Proposers Employers Federal Tax Identification Number (EIN) \_\_\_\_\_ **OR**

Social Security Number \_\_\_\_\_

**FAILURE TO SIGN AND SUBMIT THIS FORM MAY BE CAUSE FOR PROPOSAL REJECTION**

**Date** \_\_\_\_\_

**Signature** \_\_\_\_\_ **Name** \_\_\_\_\_  
(Please Print)

**Company Name** \_\_\_\_\_

**Street Address** \_\_\_\_\_

**City** \_\_\_\_\_ **State** \_\_\_\_\_ **Zip** \_\_\_\_\_

**Phone** \_\_\_\_\_ **FAX** \_\_\_\_\_ **Email** \_\_\_\_\_

**ATTACHMENT B**

**Project Budget - Not to exceed \$\_\_\_\_\_**

**Proposers may supplement with more detailed budgets, but SCSD requires use of this format.**

Description	Amount
<b>Facilitation Services</b>	
Preparation with District staff	\$
LRFPC facilitation	\$
Meeting summaries	\$
<b>Document Drafting</b>	
Document research and development	\$
Reimbursable expenses	\$
<b>Total Proposed Not-to-Exceed Fee</b>	\$

Also provide an estimate of your project budget categorized by the estimated hours by hourly fee category in the table above. For example;

Staffing Hours/Rate Breakdown	Amount
<b>Principal (Project Leader)</b> <b>XX</b> Hours at <b>XX</b> Hourly Rate =	\$
<b>Project Manager</b> <b>XX</b> Hours at <b>XX</b> Hourly Rate =	\$
<b>Team Member X</b> <b>XX</b> Hours at <b>XX</b> Hourly Rate =	\$
<b>Clerical Support</b> <b>XX</b> Hours at <b>XX</b> Hourly Rate =	\$
<b>Reimbursable Expenses</b>	\$
<b>Total Proposed Not-to-Exceed Fee</b>	\$

Add as many rows as necessary to account for each team member

**ATTACHMENT C**

**Proposal Content and Scoring**

**Address each of the following Evaluation Criteria completely, and in the order provided:**

<b>Written Evaluation Criteria</b>	
Proposer must currently hold the following license. Include a copy of the license in proposal. State of Oregon business license.	<b>Pass/Fail</b>
Describe your firm and experience working with public schools writing/drafting Long Range Facilities Plans (compliant with ORS195.110).	<b>Maximum Points Available: 20</b>
Describe you approach to completing the work in the timeframe allotted. Please see Attachment A	<b>Maximum Points Available: 20</b>
Identify the key personnel assigned to this project and their specific experience in preparing long range facilities plans	<b>Maximum Points Available: 15</b>
Describe your knowledge, understanding, insights and methodology for engagement of stake holders	<b>Maximum Points Available: 20</b>
Describe ownership of firm and any MWESB certification. Describe work force demographics	<b>Maximum Points Available: 10</b>
Provide proposed fee and hourly rates as specified in Attachment D  Budget not to exceed \$_____	<b>Maximum Points Available: 15</b>
References – provide no less than 3 client references for similar work	<b>Pass/Fail</b>
<b>Written Evaluation Criteria</b>	<b>Total Points Available: 100</b>