



St. Francis School District (SFSD)

Request for Proposal (“RFP”)

Professional Design Services

for

Pre-Referendum / Master Planning Services

February 13, 2020

PRE-PROPOSAL MEETING: **Wednesday, February 19, 2020, at 3:00 pm**

Willow Glen Primary School
2600 E Bolivar Ave
St. Francis, WI 53235

Attendance at this meeting is Mandatory.

RFP PROPOSALS DUE: **Thursday, February 27, 2020, by 2:00 pm (CST)**

RFP SUBMISSION FORMAT: Proposals shall be submitted via E-MAIL to the contact listed below. Submit one signed copy of your entire proposal in a single Adobe Portable Document (.pdf) format. Acknowledgment of receipt will be provided via an email response from the contact below once received. No paper format hard copies are to be provided.

RFP SUBMISSION CONTACT: Dr. Mark Elworthy, Interim Superintendent
St. Francis School District
Phone: 414-747-3910
Email: <mailto:melwort@sfsd.k12.wi.us>

RFP QUESTIONS CONTACT: Curt Wiebelhaus, Owner's Representative
Building Solutions, LLC
Phone: 414-303-4608
Email: curt@buildingso.com

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All checked Attachments listed below are part of the RFP.

- X Attachment A: Respondent’s Team Qualifications
- X Attachment B: Project Work Plan
- X Attachment C: Project Fee

Throughout this RFP "Respondent" or "you" means the prime firm responding to this RFP.

1.0 PROJECT INFORMATION

1.1 Background – Previous Referendum Attempt

The St. Francis School District (SFSD) (the "District") is re-engaging with the community to find the best long-term solution for the District. On April 2, 2019, 62.8% of the voters rejected a \$7.25 million referendum to consolidate Deer Creek Intermediate school with the Willow Glen Primary School. This proposed consolidation included a renovation to Willow Glen Primary School to accommodate the district's 4-year-old kindergarten through eighth-grade students in a single building. The District would have been able to borrow the \$7.25 million with no tax increase over the current tax level, due to a forecasted drop in its tax levy. This plan would have frozen open enrollment for grades 4K through 8 to achieve a target school size of 450 to 500 students over a five-year phase-in. The 2019 K-8 enrollment consists of 454 residents and 136 open enrollment students.

The \$7.25 million solution included the following budget breakdown:

- New Construction - \$4,760,000
- Renovation - \$1,640,000
- Capital Improvement Projects - \$850,000

Some of the feedback that the District received from the community after this failed attempt included the following:

- The solution was determined without using the input provided by the community.
- A consolidation indicated that the District was downsizing staff and programming. Opportunities for future growth would be limited.
- Athletic improvements were not included as part of the solution.
- There was not adequate information and explanation related to the proposed project costs.
- The popular recreation facility that is managed by the District is on the Deer Creek campus. Closing of the Deer Creek building, and continuing to operate the recreation building was a challenging concept to understand.

As of 2019, there were 679 resident K-12 students in the District compared to 1,191 students in 2000. Based on District studies, the following are contributing factors to this decrease:

- The community is aging. The median age is 45 compared to the county median age of 33.
- The median home size in the community is 1,260 square feet. The median living area of homes purchased by Millennials and Generation X nationally is 1,800-2,000 square feet.
- Birth rates for St. Francis have decreased by 22% between 2012-2016. Source: [MDRoofers Consulting Study](#) pg 17, 19-20, 25.

As of 2019, the District projected an operational deficit growing to \$600,000 per year as a result of declining enrollment and the costs for maintaining current programming and staffing levels increasing each year.

There was a community survey that was administered by School Perceptions in preparation for the 2019 Referendum. The results of this survey can be found at the following [link](#).

A complete history of the Facilities Study Committee meetings and deliverables can be found at the following [link](#).

1.2 Background – Current Planning Efforts

Dr. Mark Elworthy - Interim Superintendent, Mike Fischer – Finance Manager, and Andy Daniels – Director of Facilities and Operations are the administrative team that is leading this new planning effort along with the Board of Education. Mark and Mike offer a new perspective for the District as they were not a part of the 2019 referendum attempt.

Joe Donovan, from the Donovan Group, has been hired by the District to assist with the upcoming community engagement sessions and strategy. Below is the schedule related to community engagement and board sessions. Assuming the community is supportive of a refined solution, the targeted goal is to have a Board resolution that would allow for a November 2020 referendum.

DATE	TOPIC	WORK
2/3/2020	Board Meeting	Regular
2/17/2020	Board Meeting	Regular
2/19/2020	SFCA Annual Presentation	Information
2/24/2020	Special Board Meeting	PR Training and Finalize Engagement Sessions
2/26/2020	Engagement Session	
3/2/2020	Board Meeting	
3/3/2020	City Annual Presentation	Information
3/4 or 3/5	Special Board Meeting	Possible tour of new buildings
3/9/2020	Special Board Meeting	Possible tour of new buildings
3/11/2020	Engagement Session with Joe Donovan	
3/16/2020	Board Meeting	Selection of the architect
3/18 or 3/19	Special Board Meeting	Possible tour of new buildings
4/1/2020	Engagement Session with Joe Donovan	
2/3/2020	Board Meeting	Regular

This District has updated its 10-Year Capital Maintenance Facility Plan in December 2019. CG Schmidt, JP Cullen and Performance Services Inc (PSI) assisted the District with this plan. A copy of the plan can be found at the following [link](#). The plan is prioritized and summarized as follows:

	Willow Glen	Deer Creek	Recreation Bldg	High School	Districtwide	Totals
Immediate Needs Costs (A)	\$3,413,000	\$2,822,000	\$1,140,000	\$647,000	\$2,093,000	\$10,115,000
Emerging Needs Costs (B)	\$798,000	\$774,000	\$940,000	\$1,098,807	\$832,500	\$4,443,307
Total Immediate and Emerging Needs (A+B)	\$4,211,000	\$3,596,000	\$2,080,000	\$1,745,807	\$2,925,500	\$14,558,307
Next Level Projects Costs (C)	\$2,304,000	\$2,125,000	\$1,295,000	\$11,131,100	\$3,880,000	\$20,735,100
Total All Project Costs (A+B+C)	\$6,515,000	\$5,721,000	\$3,375,000	\$12,876,907	\$6,805,500	\$35,293,407

The District is not under contract with a Construction Manager firm. The intent is to allow the selected Architect, Donavon Group, and the District to work through community engagement sessions and other planning. At the appropriate time, the District will consider engaging a Construction Manager through a Request for Proposal (RFP) process for pre-referendum services that would compliment the Architect's services.

In preparation for the effort to find the best solution for the community, the District created a survey to help gather additional priorities for the District. The survey results were received between 8/7/19 through 1/20/20. Staff, parents, and the general community members responded to the survey. This survey was promoted through mailings, the District website, and printed materials at school offices. A total of 157 responses were received. Click on the following [link](#) to review the survey results.

1.3 Project Description

The purpose of the above information is to provide the Respondent background about the District related to facility planning. Through the professional services of the Architectural firm, the final solution shall be validated and refined using proven strategies to guide St Francis School District to the best long-term decision.

The Community, District Staff, District Administration, Board of Education and the selected Architectural Firm are the key groups that will help guide the District to this solution.

Ideas that have been contemplated and will be refined through the upcoming community engagement sessions include:

- An operational referendum to address the forecasted budget shortfall
- A capital referendum to address the needs in the 10-year Capital Plan
- A capital referendum for new construction/additions
- A capital referendum for athletic upgrades
- A capital referendum for new construction/addition at Willow Glen to create a K-8 and recreation campus
- Combination of items above

1.4 Scope of Services

The primary service that is being requested for the District to take the next step is Pre-referendum / Master Planning services. These services shall include guiding the District to the best long-term solution that will be supported by the Community. Once this solution is determined, the Architectural firm shall be the lead strategizer to educate the voters on the solution by developing plans, providing resources, strategy, and direction for the District.

The optional secondary service that shall be offered includes design services based on a sliding scale of project size for capital improvements, renovations and/or new construction. This shall include all services and deliverables necessary to complete Schematic Design, Design Development, Construction Documents, and Construction Administration. It should be figured that the project(s) will be delivered via a Construction Manager at Risk (CMaR) delivery method.

All designs, drawings, and specifications shall be completed in accordance with:

- All applicable building, life safety, and energy codes
- All applicable Mechanical & Electrical codes
 - Focus on Energy Rebates shall be pursued and reviewed with the District
 - Energy improvements that meet or exceed 50% savings in energy and power cost compared to the ASHRAE 90.1-2001 baseline shall be pursued and reviewed with the District
- ADA regulations

1.4.1 Pre-Referendum / Master Plan Services

- Guide the District on “Best Practices” for Community Support and Solutions
- Provide Informational Materials and Deliverables
- Community Engagement Sessions
- School Board Updates
- Community Updates
- Visionary Planning for a Long-Term Solution
- Other Tasks Required to Develop and Communicate a Comprehensive Master Plan for the District

1.4.2 Post Referendum Design Services

The Basic Services for the Project after the Pre-Referendum phase will include:

- Schematic Design Phase
- Design Development Phase
- Construction Document Phase
- Bidding / Negotiation Phase
- Construction Phase - Administration of Construction Contract
- Consultants retained for the above services shall provide the following minimum services
 - Civil Engineering (exclude stormwater management as it may not be necessary for the solution)
 - Landscape Design
 - Technology wiring design
 - Security system design (card readers, CCTV, etc)
 - Structural Engineering
 - Electrical Engineering
 - Mechanical Engineering
 - Plumbing Engineering
- Optional services that shall be provided separately include:
 - Furniture Consultant (including design, bidding, and procurement)

Service requirements are further defined in the Contract referenced in section 1.6.

1.5 District-provided Information

The District has assembled the following information about the Project (collectively, the “RFP Documents”) for review by the Respondent:

- This RFP with all the attachments (including hyperlink attachments)
- All hyperlinks included in this RFP.

The District will provide notice of any changes to the RFP via addenda. Any information provided to Respondents during the course of the RFP process, including the documents enumerated in this Section 1.5, is provided only for your use in preparing your Proposal. The final project scope and schedule are likely to be different from what is included in this RFP. This RFP creates the baseline for adjustment. All modifications to scope and schedule will be adjusted from this baseline RFP.

1.6 Contract Sum

The selected Respondent will perform the Pre-Referendum/Master Planning work for a stipulated sum. The optional Post Referendum Work will include the Respondent's Fee applied to the Cost of the Work for the project (as those terms are defined in the Contract).

Reimbursable Expenses for the Project shall include fees paid for securing approval of authorities having jurisdiction, printing/reproductions/plots, postage/handling, other expenditures approved in advance by the Owner. All other expenses shall be included in the fees listed above.

1.7 Form of Contract between the District and the Selected Respondent

1.7.1 The Contract between the selected Respondent and the District will be Owner and Architect (Design) Agreement, AIA B133-2014. Other mutually agreed upon modifications to the default contract will be acceptable, however, if there is no mutual agreement the default contract language shall remain.

1.7.2 The Contract will incorporate by reference this RFP and any RFP Attachments, and any RFP modifications agreed to by the District. The District may attach to the Contract as Supplementary Conditions Respondent's Proposal, selected provisions of Respondent's Proposal or modifications to Respondent's Proposal agreed to by District and Respondent.

2.0 PROPOSAL REQUIREMENTS AND EVALUATION CRITERIA

2.1 Tentative Schedule of Selection Process

The District's intended schedule for selection of the awarded Respondent is set forth below.

Activity	Date
RFP Available for Distribution	February 13, 2020
Pre-Proposal Meeting	February 19, 2020
Deadline for RFP Questions	February 24, 2020
Architect responses due	February 27, 2020, by 2:00 pm
Shortlist for interviews finalized	March 2, 2020
Architect Interviews	TBD
Board Approval of Architect Selection	March 16, 2020

2.2 Pre-Proposal Meeting

A Pre-Proposal Meeting has been scheduled at the location and time noted on page 2 of this RFP. Attendance at this Pre-Proposal Meeting is Mandatory.

2.3 Evaluation Criteria

2.3.1 The District will evaluate Proposals against the evaluation criteria for the degree to which each Proposal meets the criteria as follows:

Attachment / Section	Description	Value
<u>Attachment A</u>	Respondent's Team Qualifications	20
<u>Attachment B</u>	Project Work Plan and Strategy	20
<u>Attachment C</u>	Project Fees	20
Section 2.8	Interview	20

2.3.2 In order to be considered responsive, each Respondent must complete and submit all required Attachments to the RFP Documents.

2.3.3 The District will evaluate and score each Proposal. The Respondent selected for an award will be the one whose Proposal is responsive, responsible, and is the most advantageous to the District, as determined by the District in its sole discretion.

2.3.4 Submission of a Proposal indicates the Respondent's acceptance of the evaluation criteria.

2.4 Respondent's Team Qualification

The Respondent will prepare and submit information pertaining to their Team's Qualification which will identify the experience of the Respondent and its Team Members. A lack of prior experience and/or working together on comparable projects may hinder your overall score. Failure to complete may result in disqualification.

2.5 Project Work Plan and Strategy

The Respondent will prepare and submit a Project Work Plan. The Project Work Plan should emphasize the Respondent's understanding of the Project requirements by documenting their approach/methodology as it applies to the Project's scope of work, schedule, and budget. In addition, the Respondent should identify any constraints and issues they see affecting the Project. Failure to complete may result in disqualification.

2.6 Project Fee

The Respondent will prepare and submit information regarding their proposed Project fee. Failure to complete may result in disqualification.

2.7 Interviews

If necessary, the District may shortlist and interview the top-rated Respondents.

The District may request that the Respondent's team members attend the interview on the date specified in this RFP. The District may request additional information before interviews.



ATTACHMENT A: RESPONDENT'S TEAM QUALIFICATIONS

1. Provide the Firm profile information as indicated in Attachment A-1.
2. Complete the following Critical Team Member Experience Matrix (Attachment A-2), identifying the experience and responsibilities of the identified team members. Note the following when documenting this information:
 - a. Submit information for the Project Roles specified in the Matrix.
 - b. List only ONE individual per role. Include additional names using attachment A-3.
 - c. The comparable project(s) must have been commenced/completed within the last FIVE years and should be similar to the District's Project.
 - d. Attach a 1-page resume for EACH individual listed in the Matrix.
3. Complete the following Additional Team Member Matrix (Attachment A-3) identifying the other key Team Members / Subcontractors that will contribute to the success of the Project. Note the following when documenting this information:
 - a. Attach a 1-page resume for EACH individual listed in the Matrix.
4. Complete and submit the following Project Data Sheet(s) (Attachment A-4) identifying the specific project experience of the Respondent and their Critical Team Members. Note the following when documenting this information:
 - a. A separate Project Data Sheet must be prepared for EACH project with only one project allowed per sheet.
 - b. Submit up to, and no more than, THREE total projects.
 - c. Listed project(s) must have been commenced/completed within the last FIVE years and should be similar to the District's Project.
 - d. Listed project(s) must have been managed by the Respondent or any other firm on the Respondent's team.
 - e. It is recommended that you list projects completed by the Team Members identified in Attachment A-2.
 - f. Attach any photos or additional information (no more than two pages worth) with each Project Data Sheet.

ATTACHMENT A-1: RESPONDENT'S FIRM PROFILE

The Respondent shall include the following items related to the firm.

Firm Information

- Firm Name, Address of the main office and any branch offices. Indicate which office would be managing this project.
- Name and title of the contact person
- Names of officers in the firm and an organizational chart
- Number of years the firm has provided architectural services
- Number of related K-12 educational projects greater than \$10M in the previous three years
- Total number of projects greater than \$10M in the previous three years

ATTACHMENT A-2: CRITICAL TEAM MEMBER EXPERIENCE

Project Role	Pre-Referendum Manager/Team Leader	Design Project Manager	Design Architect
Name of Individual			
E-mail Address			
Individual's Firm Name			
Individual's Firm Location	City, State	City, State	City, State
Current job function within Firm			
Years working within Firm	#	#	#
Years working within Industry	#	#	#
Number of projects completed with other Team Members	1. Design PM # 2. Design Architect: #	1. Pre-Referendum/Team Lead: # 2. Design Architect: #	1. Pre-Referendum/Team Lead: # 2. Design Project Manager: #
Identify the name, cost, and completion date for up to three <u>comparable</u> projects	1a. Project Name 1b. Project Cost 1c. Completion Date 2a. Project Name 2b. Project Cost 2c. Completion Date 3a. Project Name 3b. Project Cost 3c. Completion Date	1a. Project Name 1b. Project Cost 1c. Completion Date 2a. Project Name 2b. Project Cost 2c. Completion Date 3a. Project Name 3b. Project Cost 3c. Completion Date	1a. Project Name 1b. Project Cost 1c. Completion Date 2a. Project Name 2b. Project Cost 2c. Completion Date 3a. Project Name 3b. Project Cost 3c. Completion Date
Briefly describe the Individual's Responsibilities for this Project			
Percent of Time on Project	#%	#%	#%

ATTACHMENT A-4: PROJECT DATA SHEET

Design Firm Name		Project Owner	
Project Name		Project Owner Contact	
Project Location	City, State	Project Owner Contact E-mail	
Construction Cost		Proposed Team Members from Attachment A-2 / A-3 that worked on this project	
Construction Commencement Date			
Construction Completion Date			
Project Size (square feet, etc.)			
Type of Services Provided (Predesign, Design, etc.)			
Construction Delivery Method (CMAR, Design-Build, etc.)			
<p align="center"><u>Briefly</u> describe how this project is similar to the District's Project. Identify any challenges you encountered on the project and <u>briefly</u> describe how these issues were resolved</p>			

ATTACHMENT B: PROJECT WORK PLAN AND STRATEGY

1. Prepare and submit information about your approach/methodology as it applies to the Project's scope of work.
2. Identify any concerns you noted in your review of the RFP Documents for this project if any.
3. Based on the background information and current planning outlined in the RFP, indicate what potential strategies and/or how you would suggest gathering key information to support the best plan for the District.
4. Describe how you would navigate through a situation where you performed in-depth research into the District's finances, facilities and vision/goals arriving at the best "business" solution; however, this solution does not match up with the dominant viewpoint from the Community.

ATTACHMENT C: PROJECT FEE

1. Provide a Fixed Price for Pre-Referendum / Master Planning services. This fee should be based on a November 2020 referendum. Provide an additional cost, if pre-referendum services were extended to April 2021 due to a solution not being ready for a November 2020 vote.
2. Provide a percentage fee that would be applied to the "Cost of Work" per bid package. Fill out the fee schedule below for architectural fees based on the size of the bid package. Additional clarifications or qualifications are acceptable to list, as needed.

Description	Contract	Fee
Lump-Sum, Fixed Price – Pre-Referendum / Master Planning Services through November 2020*		\$
Additional Cost to Extend Pre-Referendum / Master Planning Services through April 2021 (if Nov deadline was extended)*		\$
% Fee on Cost of Work	§ 11.1	Fee scale below is based on the size of the individual bid/plan package
\$1M - \$2M		%
\$2M - \$5M		%
\$5M - \$10M		%
\$10M - \$25M		%
\$25M - \$40M		%
\$40M - \$60M		%
Reimbursable Expenses per 1.4	§ 11.8	As Required

*If the contract was terminated for the Owner's convenience (AIA Article 9.7) up to 30 days after the referendum (whether passed or failed), this is the fee that would be due. This fee is in addition to the Fee on % of Cost of Work.

3. Provide a fee for Furniture Design and Procurement services, if offered. This is an optional service that the District may or may not proceed with. The District would determine this after the Pre-Referendum / Master Planning phase is complete. Furniture Design and Procurement fee shall be based on the total bid amount of the purchased furniture. Services shall include meeting with District staff in order to specify appropriate furniture, manage the bid process, manage the installation and punch list related to the furniture.

Furniture Design and Procurement Fee - _____%

4. Respondents shall include an hourly rate schedule in the response for any additional work that may be required.