



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

Montezuma-Cortez School District (Owner)

400 N. Elm ST.
Cortez, CO 81321
Phone (970)565-7282

PROPOSAL DUE DATE/DELIVERY REQUIREMENTS- 2:00 p.m. October 19th 2023

Deliver 1 electronic copy via email + 8 Original Copies to:

Tom Burris

400 North Elm Street
Cortez, CO 81321
Phone (970) 564-7282
tburris@cortez.k12.co.us

All official communication with Candidates and questions regarding this RFQ/P will be via email to the Owner Contact listed above. **No inquiries will be accepted after the clarification deadline as indicated in the project schedule.**

All Candidate inquiries will be responded to at the same time which will be after the "Clarification Deadline". Responses to clarification will be made available [(10/12/2023) on the Owner website where the RFQ/P is posted.] [(10/12/2023) 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	9/25/2023
OPTIONAL Site Visit	10/9/2023
RFQ/P Clarification Deadline	10/11/2023
RFQ/P Clarification Responses	10/17/2023
RFQ/P Responses due (2:00pm)	10/19/2023
Candidates Notified of Selection	11/2/2023
Contract Negotiations	11/9/2023
Notice to Proceed Given to Successful Firm	11/9/2023
Master Plan Complete	11/16/2023
(IF PURSING GRANT) Draft Grant Application/CDE Coordination	07/1/2023 -12/31/2023
(IF PURSING GRANT) Grant Application Submittal	01/9/2024-02/06/2024

II. BACKGROUND

Owner Background

The Montezuma-Cortez School district RE-1 is a midsize school district serving the city of Cortez and its surrounding community. The student population of the school district is approximately 2134 and employs roughly 400 full and part time personnel. The school district has 6 active schools (3 Elementary-Mesa, Kemper and Lewis- Arriola, 1 middle school – (Montezuma Cortez Middle School) and one High School (Montezuma Cortez High School)and also runs a pre-school (Beech Street Preschool), and also actively uses another decommissioned elementary school (Downey) as the Administration building, has a warehouse/food services building, a bus garage/storage facility and a maintenance building (the annex to the middle school).The school district controls 1 de-activated school building (Manaugh elementary) The district serves a diverse community which includes traditional agricultural and ranching communities, a vibrant healthcare community , the Ute Mountain Ute Tribe in Towaoc , CO , a large Navajo community , and a robust business and retirement community.

Project Description

The environmental work described in this RFQ/P is in support of the new Montezuma Cortez Pre K-5 elementary school replacement project.

The existing pre-k (Beech Street) located at 510 N. Beech St. built in 1950 as a church, the original brick building was approximately 10,971 s.f. and build on .81 Acres, The facility was acquired by the school district and remodeled in 1988 as a kindergarten. It is now used as a Preschool building for children over 2 ½ years of age. The elementary schools located at (mesa) 703 W. 7th Street, mesa was originally constructed in 1960 on 11.41 acres, and the original building was approximately 30,884 s.f. It contained 14 classrooms, a gymnasium, a kitchen, and administration offices. In 1985 a 10,036 s.f. addition was added to the south end of the classroom wing. It contained seven more classrooms, bathrooms, a custodian closet, and a new mechanical room. In 2006, a courtyard at the front of the building was filled in with new classroom and media center, this addition and remodel added 3,453 new square feet and remodeled the original media center into what is now the music room and computer lab. (Kemper) located at 620 E. Montezuma Street, originally constructed in 1957, the original building was approximately 26,820 s.f on a site of approximately 3.77 acres. It contained 15 classrooms, a gymnasium, a kitchen, and administration offices. Six classrooms, a workroom and a music room were added onto to create the current media center. The original administration area was remodeled into the current computer lab and workroom.

Facilities Included in the Scope of Services

1. Mesa Elementary A
703 West Seventh St
Cortez, Co 81321
Constructed: 1960
Additions: 1980, 2006
Approximate Enrollment: 410
Square Footage: 44,374 S.F
Site: 12.41 acres
Description of Facility:
Historical significance:

2. Kemper Elementary B
620 East Montezuma Avenue
Cortez, CO 81321
Constructed: 1957
Additions: 1987
Approximate Enrollment: 353
Square Footage: 36,420S.f (35,572S.F at Main Level, 848S.F at Basement)
Site: 3.77 acres
Description of Facility:
Historical significance:

3. Beech Preschool C
510 North Beech Street
Cortez, CO 81321
Constructed: 1950
Additions: 1988
Approximate Enrollment: 80
Square Footage: 10,971S.F.
Site: .81acres
Description of Facility:
Historical significance:

III. MASTER PLAN OBJECTIVE

The objective of the Owner is assistance in the preparation of a facility master plan that will address both the short term and long term facility needs. The master plan will serve as a "road map" ultimately leading to high performing, 21st century school facilities.

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

IV. SUBMITTAL REQUIREMENTS

Organize your RFQ/P response using the following outline. Please separate each section with dividers or tabs using the appropriate section labels. ***No fees shall be included in the RFQ Submittal.***

SECTION 1 – LETTER OF INTEREST

A maximum two page letter of interest that includes a synopsis of the firm, business principals, distinguishing characteristics, approach to completing this project, primary contact information, and signed by the principal-in-charge.

SECTION 2 – EXPERIENCE AND QUALIFICATIONS

Please address each criterion listed below as it relates to your firms relevant experience and qualifications.

1. Identify the individual who will be the main point of contact and the team responsible for providing services for the duration of the project. (the Owner reserves the right to determine the acceptability of these individuals)
2. Provide all team members experience, background and responsibilities including resumes.
3. Describe your firms past experience with master planning and educational programming.
4. Provide your firms project organization structure and responsibilities.
5. According to your firm, what is the value of a master plan and what is it used for?
6. What criterion does your firm use to determine if a building should be remodeled or if it should be torn down and rebuilt?
7. Describe your approach to integrating multiple sources of information about an Owner's facilities and community into the master plan.
8. How does your firm provide an in-depth cost evaluation associated with deficiencies in a facility? This should include hard and soft costs.
9. Show your ability/approach to organize and meet schedules.
10. Identify master plans your firm has completed with a similar size and scope to the proposed project.
11. Demonstrate experience understanding and analyzing school operations, school programs, enrollment projections and demographic data.
12. Knowledge of LEED, US CHPS, and Green Globes criteria and program requirements.
13. Understanding of the Owner, its organization and leadership.
14. Identify any other unique challenges/approaches that you have experienced that will assist the Owner with developing a successful master plan and ultimately successfully implement the master plan.

15. Based on your current workforce and staffing in addition to the number of projects your firm currently has under contract or in negotiation does your firm have the capacity to complete this project? What percentage of your firm is currently involved in other projects?
16. This project requires the Candidate to carry, at a minimum, general liability insurance and workers compensation according to State laws.

SECTION 3 – SCOPE OF SERVICES

The Candidate chosen will be expected to develop a master plan through a team effort involving school administration, staff, students, community members, and professional consultants with disciplines in education, planning, programming, architecture, engineering, construction, facility management, facility operations, and technology. The master plan should explore a variety of options, based on a thorough assessment of the facilities, to develop a strategic implementation plan for the long term facility needs.

Please address each of the following items below.

1. Facilities Master Planning Services

Complete the Scope of Services Matrix provided as Exhibit A. Exhibit A is broken up into three categories: required services, additional services desired by the Owner, and additional scope offered by Candidate. The Candidate must validate each line in the exhibit by marking either provided or excluded.

The required items in Exhibit A represent the minimum deliverable requested in this RFQ. By submitting a response and proposal to this RFQ, candidates are agreeing to provide all services associated with the development of the Master Plan deliverable described. In general, these services may include, but are not limited to:

- a. Facilitating Community/Committee Meetings to gather information and seek input;
- b. Performing Facilities Assessments and comparing findings with the CDE Statewide Facility Assessment;
- c. Performing SF, program, and classroom utilization studies to discover and correct inefficiencies;
- d. Assisting Owner and Owner’s committees with analyzing information and/or generating options;
- e. Developing multiple options for consideration, and provide adequate information for analysis;
- f. Assisting Owner in prioritizing potential capital projects toward build-out of selected option;
- g. Completing and publishing the Master Plan document as described in deliverable (Exhibit A)

In addition to completing Exhibit A, please provide a separate narrative description of your approach to the scope requested, describing quantity and types of proposed meetings, site visits, unique methodologies, etc. Additional services or scope may be proposed and identified in the final section of Exhibit A, however fees for these services should be identified as a line item in the fee proposal for consideration. Any exclusions from services or deliverables described must be explicitly identified in the submittal.

2. ADD ALTERNATE #1 - Grant Application Support Services

In the event that the master planning process results in the Owner proceeding with a BEST Grant application, the Owner may request assistance with preparation of a BEST grant application. These grant assistance services may include but are not limited to:

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- a. Ensuring that all costs (hard, soft, and owner) and scope are included in grant application;
- b. Ongoing communication with the Owner;
- c. Coordination of and attendance at meetings as needed and requested (via conference call if possible);
- d. Reviewing BEST application requirements and familiarization with BEST grant information from CDE website;
- e. Compare master plan assessments with Owner’s CDE Facility Assessment data, and coordinate notable discrepancies with CDE staff;
- f. Communication and cooperation with CDE staff as needed;
- g. Documentation required by CDE to provide to the Colorado Historical Society as applicable;
- h. Preparing the BEST grant application including scope narrative for final Owner approval;
- i. Preparing LEED, CHPS and/or Green Globes scorecard and narrative;
- j. Providing additional information required for CDE to complete the analysis of the grant application;
- k. Acting as a liaison for the Owner for CDE follow-up grant questions;
- l. Other duties as required;

If the Candidate is interested in providing add alternate #1, please provide a narrative expressing your firms interest and capacity to complete this scope as presented.

3. ADD ALTERNATE #2 - Bond Issue Support Services

In the event that the master planning process results in a successfully awarded BEST project, the Owner may request the following additional services:

- a. Assistance with providing the Owner with graphic images of conceptual design for the community
- b. Attendance at community meetings to discuss the bond election
- c. Attendance on conference calls, answering questions regarding the project, and providing the Owner with information as needed to prepare and communicate the project for the bond election

If the Candidate is interested in providing add alternate #2, please provide a narrative expressing your firms interest and capacity to complete this scope as presented.

SECTION 4 – SCHEDULE

It is expected that your firm has the current capabilities and capacity to complete the master plan by the date listed in the project schedule. Provide a detailed master plan schedule, including milestones, from the notice to proceed date to the completion of the master plan. Provide reasoning, in this section, for any modifications or alterations your firm wishes to make to the recommended project schedule

SECTION 5 – REFERENCES

Provide a comprehensive list of **ALL** school projects completed or begun within the last 5 years, with contact information, along with a project description. Identify in the reference list which projects this master 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: Letter of Interest. 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: Experience and Qualifications Provided a comprehensive and insightful experience and qualifications package which highlighted key personnel in addition to other items as stated.	30 points
Section 3: Scope of Services. 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: Schedule. Ability to complete the planning tasks within the timeframe needed. Submitted complete & understandable schedule.	25 points
Section 5: References. Candidate has provided a comprehensive project list with contact information for projects completed over the last five years.	5 points
Total Points	100 points

Phase 2 – Interview

An interview invitation will be sent out to the three Candidates with the highest RFQ/P submittal scores on the date noted in the project schedule. The invitation will explain the interview requirements and provide the time and location. The purpose of the interview is to ensure a full understanding of the RFQ/P responses and to introduce key members of the master plan team.

The interviews will consist of a short presentation followed by a longer period for questions and answers. During the short presentation, the lead consultant for the project should be identified along with members of the master planning team. Please note team members that will not be directly working on the project are not invited to the oral interviews.

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

VI. FEE PROPOSAL

Shortlisted Candidates shall prepare a detailed fee proposal as outlined below. The fee proposal is to be submitted in a sealed envelope prior to the start of their interview. Failure to provide a fee proposal which addresses each of the items listed below may result in disqualification from the RFQ/P process.

Detailed fee proposals shall include the following:

- ✓ Lump sum fee;
- ✓ Statement of work;
- ✓ Confirmation that all scope items from the original RFQ/P will be addressed;
- ✓ Any exclusions with explanations;
- ✓ # of hours;
- ✓ # of people;
- ✓ Other resources;
- ✓ How the resources are to be used;
- ✓ Breakout of anticipated reimbursable included in the fee proposal;
- ✓ Hourly rates for all personnel involved in the project;
- ✓ Number of site visits anticipated to complete the work;
- ✓ Breakout of fees for any non-required scope proposed;
- ✓ Pricing for add alternate #1 – Grant Application Support Services*
- ✓ Pricing for add alternate #2 – Bond Issue Support Services*

*Note: Both add alternate #1 and add alternate #2 are to be considered optional for the Owner. Provide a separate fee for each of these services independent of your master plan fee.

The negotiated fee is anticipated to include all costs including reimbursable for the project resulting in a "not to exceed" format contract.

Fee proposals will be opened and evaluated only after all qualifications scoring is completed and finalized at the interview. A weighted fee proposal score will be included in the final interview score.

If the apparent winner's fee exceeds the Owners budget and if subsequent negotiations with the apparent winner are unsuccessful, the Owner reserves the right to negotiate with the next highest-scoring Candidate.

VII. Acceptance and Rejection

After the final selection has been made, the Owner will provide a summary of scores and a decision memorandum to each of the RFQ/P Candidates.

The Owner reserves the right to select any or reject any and all proposals in their best interest. The Owner also reserves the right to pre-qualify any or all Candidates or reject any or all Candidates as unqualified, including without limitation the right to reject any or all nonconforming, nonresponsive, unbalanced, or conditional, qualifications. The Owner also reserves the right to re-solicit, waive all informalities not involving price, time, or changes in the work, and to negotiate contract terms with the apparent successful proposer.

The Owner is not responsible for cost incurred in preparation of this proposal. Proposals will not be returned and become the property of the Owner once submitted. By submitting a proposal all Candidates agree to the terms and conditions of this RFQ/P and the RFQ/P will become part of the awarded Candidates contract. The apparent winner will be responsible for submitting a draft agreement to be used for this project. The Owner and the Owner's legal council will review the agreement and negotiate terms prior to commencement of work.

If the master planning process results in a decision to move forward on a capital project, the Owner will complete a separate competitive selection process to select the design and construction team for that project.

VIII. RFQ/P Supporting Material

1. [Exhibit A: Master Planner Scope of Services Matrix](#) to be completed as part of this submittal

The following are to be utilized by the master planner for reference in developing a master plan:

1. Capital Construction Assistance Public Schools Facility Construction Guidelines. Master Planner to reference this document as a guideline during the master planning process.
2. Summary of 5B 07-51 re: High Performance Requirements. These requirements apply to building projects receiving 25% or more of state funding.
3. 24-80.1-104 C.R.S. ref: Colorado Historical Society.
4. Public School Facilities Master Plan Guidelines from CDE's Division of Public School Capital Construction Assistance. This document represents the Owner's minimum expectations for the deliverables and associated scope of the master plan.
5. Statewide Facilities Assessment should be reviewed and failing systems further investigated in the assessment portion of the master plan.