

**METHACTON SCHOOL DISTRICT
REQUEST FOR PROPOSAL**

Methacton School District hereby invites the submission for:

PROFESSIONAL SERVICES FOR CAPITAL PROJECTS

Issued January 12, 2017

Responses to this RFP will be received at the offices of the Methacton School District, 1001 Kriebel Mill Road, Eagleville, PA 19403, until 1:00 P.M. on **Tuesday, January 31, 2017 prevailing time**, at which time they will be opened and reviewed.

Responses must be sent to: Methacton School District's Director of Business Services, Thomas Klaus, at tklaus@methacton.org.

The administration will review all proposals, seek clarifications where needed from submitting firms, and plan to recommend a firm to the Board of School Directors in February 2017.

PURPOSE

The Methacton School District (District) is seeking proposals from a professional services firm who can advise, design, coordinate, and manage school capital improvements/repairs/replacement projects. The District has determined that it is in its best interest to retain the services of a professional firm to be available to assist with the following:

1. Capital projects outlined in a recent district-wide facilities assessment
2. A number of capital projects that generally require professional services to complete in the course of a given fiscal year

Therefore, the District has determined that it is in its best interest to retain the services of a professional firm to be available under contract and “on call” to improve the timing, consistency, efficiencies, and continuity of delivery of services for these projects.

Furthermore, the District is interested in developing a relationship with a professional firm that can provide the necessary project development, planning and implementation to assist the district in addressing nearly \$100,000,000 in capital projects over the next 10 years.

The scope of services requested in this Request for Proposal (RFP) include:

A professional firm who can, as described in the purpose, provide a variety of professional services whereby the District can draw upon to address district-wide facilities capital needs and whom can leverage the following services to address such capital needs in the most efficient and costs effective manner:

- Project design development
- Architectural/Engineering and Estimating
- Construction contract administration
- Mechanical, electrical, plumbing, civil, structural, landscaping, technology, acoustics, engineering, audio visual and commissioning
- Systems performance verification
- General construction planning and project oversight

BACKGROUND

The District recently accepted a facility assessment study performed by a third party. This study can be requested by prospective firms by contacting the District's Director of Business Services. The District has also completed a capacity enrollment study and an Energy Audit based on Ashrae level II guidelines. A recent ESCO project at our high school and upper elementary school have also been recently completed. The District is seeking to begin relationship in March 2017 with potential for project work to begin in the summer of 2017.

PROPOSALS

Proposals must be submitted no later than **1:00 P.M. on Tuesday, January 31, 2017** prevailing time. Interviews will be conducted by the District following submissions. Additional information may also be requested.

All questions concerning this RFP should be submitted in writing via email to Mr. Thomas Klaus, Director of Business Services, at tklaus@methacton.org prior to **4:00 P.M. on Friday, January 20, 2017**

Proposal Statements:

It is understood that by requesting this proposal, the District is not incorporating the public bidding process into this solicitation and nothing contained herein shall create any contractual rights or obligations by and between the District and any person or entity responding hereto.

The scope of services desired is defined in this RFP. The District shall have the right to modify this scope, as it deems necessary. The terms of the Contract between District and Professional Firm (Firm) shall be subject to review and modification by the District's solicitor shall an offer of contract be made.

The District is not responsible for any costs incurred by the Firm in responding to this RFP. It is understood that the District reserves the right to reject any or all proposals, or part thereof or items therein and to waive technicalities required for the best interests of the District. Omission of any information may be sufficient cause for rejection of the proposal. The District shall not be legally bound until such time as a Contract in writing is executed by both the Firm and the District.

The Contract will be for one fiscal year (ending June 30 of the fiscal year) with options to annually renew for up to three additional fiscal-year periods (July 1 through June 30) for a total of 4 years.

The Methacton Board of School Directors at the recommendation of the Superintendent of Schools will approve the Contract between District and Firm. The Superintendent and Director of Facilities will authorize all work subject to consideration by the Board of School Directors. The Director of Facilities will act as the single point of contact once a contract is authorized.

TIMELINE

The tentative schedule for the selection process is:

- Issue RFP – January 12, 2017
- Receive responses to RFP by January 31, 2017 at 1 p.m. prevailing time
- Presentation of proposals and interviews held with finalist - date to be determined in February 2017
- Recommended vendor presentation to Property Committee of the School Board - February 2017
- Recommended vendor approved by Board of School Directors - February 2017
- Work by Vendor begins – March 2017

PROPOSAL EVALUATION CRITERIA

Proposals will be evaluated and scored as follows:

Written Responses/Qualifications (25% of Total Score)

- Project Team – 5 points
- Proposed Project Manager – 5 points
- Experience and previous performance of proposed team and staff on similar projects – 10 points
- Clarity and organization of proposal – 5 points

Written Technical Approach (25% of Total Score)

- Project Understanding – 10 points
- Proposed methods/process to accomplish work, alternative approaches, & risk management – 15 points

Fee Proposal and General Considerations (25% of Total Score)

- Clarity of fees and associated process timeline -15 points
- Clarity and depth of general considerations -10 points

~Firms selected to be interviewed will be dependent on the quantity and quality of submissions~

Presentation and Interview (25% of Total Score)

- Quality and clarity of presentation – 5 points
- Project Manager’s ability to communicate project understanding – 10 points
- Adequacy of Response to District Questions – 10 points

Proposals shall contain the information listed below and shall be marked as follows:

SECTION 1. ORGANIZATION, STAFFING, AND QUALIFICATIONS

1. Provide a project team organizational chart depicting team members and all consultants or third parties required to perform part or sub-parts of any mechanical, architectural, electrical, plumbing, civil, structural, landscaping, technology, acoustics, commissioning, design, and planning work. Provide all names, titles, specific responsibilities, resumes, and qualifications of each of the team members that will be directly involved in district projects. Provide the name of the lead project manager and their qualifications.
2. Provide the address of the specific office which will have responsibility for performing the contract services for the District.
3. Provide a brief overview of the Firm including the number of years Firm has been providing architectural/engineering/other similar services. Provide experience with commissioned mechanical projects, as well as other work performed.
4. Provide a list of school districts for which the Firm has performed similar functions as requested here within.
5. Discuss the reason(s) why Firm believes it should be selected by the District for this service. Discuss any unique qualifications that Firm possesses which would benefit the District in the execution of this relationship.

SECTION 2. METHODS/PROCESS

1. Provide a description of how the Firm will approach the work given the fact that the District may want to bond no more than \$10 Million annually to address needs and where projects shall be properly bid following all related school procurement laws and shall be properly permitted.
2. Where applicable, provide an estimate of time associated with each step of the annual process from planning through closeout. The use of a timeline is appropriate. Explain how the Firm will address commissioning where applicable.
3. Provide a description of how you would consider the facilities assessment study information and the recent ESCO project work completed at the high school and Arcola/Skyview campuses.
4. Provide a description of services that you would outsource to a third party and how you plan to do that and why.
5. Provide any alternative approaches or other considerations that you feel pertinent to managing the project and risks associated with such projects.
6. Provide a description of the process for managing projects and reporting project progress to the Administration and Board of School Directors.
7. Provide a listing of projects that came in under budget and on time.
8. Provide the average amount of non-owner driven change orders.

SECTION 3. FEE PROPOSAL

1. The fee proposal shall include a description of how the Firm plans to be compensated for work completed. The Firm shall provide such list of rates/schedules for services and or percentage calculations or other indicators for the District to assess the costs for Firm to complete work requested in this RFP. The Firm shall include all other costs and other payments due to the Firm (e.g.: manpower, overhead, profit, direct costs, mileage, phone, printing, etc.) in the performance of the basic services as outlined in this RFP.
2. The Firm shall provide an estimated number of hours or other determination of time it sees typically attributed to the process timeline provided in Section 2. Also, include projected hours or other related services including clerical support services.
3. The Firm shall provide a schedule for payment of fees based on process timeline.
4. The Firm shall categorize pricing where applicable into the following general categories:
 - a. Annual planning and estimating/strategic approach
 - b. Preparation of bidding documents and evaluation of bids with recommendations

- c. Contracting
 - d. construction management/reporting/closeout
5. The Firm shall furnish to the District proof of professional liability insurance in the amount of \$1,000,000 per claim and \$3,000,000 in the aggregate, with the District to being able to be named certificate holder once contract awarded.
 6. All responses shall include the non-collusion statement attached to this RFP.

SECTION 4 - GENERAL CONSIDERATIONS

1. Provide a list of references for which the District can contact that the Firm has provided similar services. Please provide contact name, organization name, phone and address along with a not greater than 3 sentence explanation of work performed.
2. Provide a description, result, and explanation of a previous relationship with client that you no longer have a relationship with. Do not provide client information or reveal sources.
3. The District reserves the right to bring forward Firms to interview for possible contract consideration. All Firms submitting a proposal shall be prepared to have the Project Manager whom is assigned this work be present for the interview when scheduled.
4. Provide any additional matters for the Board's consideration in determining your Firm's fit for this relationship.
5. All responses shall include the non-collusion statement attached to this RFP.

BY SUBMISSION OF A RESPONSE TO THIS RFP, THE RESPONDING FIRM AND EACH PERSON SIGNING ON BEHALF OF FIRM CERTIFIES, AND IN THE CASE OF JOINT RESPONSE, EACH PARTY THERETO CERTIFIES AS TO ITS OWN ORGANIZATION, UNDER PENALTY OF PERJURY, THAT TO THE BEST OF HIS/HER KNOWLEDGE AND BELIEF:

(1) The prices of this RFP have been arrived at independently, without collusion, consultation, communication, or agreement with any other Bidder or competitor, for the purposes of restricting competition or as to any matter relating to price.

(2) Unless otherwise required by law, the prices quoted in this response have not been knowingly disclosed by Firm and will not be disclosed by Firm directly or indirectly to any other bidder or competitor before award is determined.

(3) No attempt has been made or will be made by the Firm to induce any other person, partnership or corporation to submit or not to submit a response on any portion of the RFP work.