



Forward Thinking, High Achieving.

## STATEMENT FOR QUALIFICATIONS

Missoula County Public Schools, Missoula, Montana, is soliciting statements for qualifications for a Facilities Comprehensive Master Plan. **Sealed** proposals must be received at the MCPS Business Office, 915 South Avenue, Missoula, Montana, 59801, on June 5, 2012 **before** 4:30 p.m. No late, faxed, or emailed bids will be accepted.

The necessary documents are available online at the MCPS website – [www.mcps.k12.mt.us](http://www.mcps.k12.mt.us). (click on Departments tab and select Business Services).

Proposals submitted must include the information as outlined in the Request for Qualifications and will be the basis of award. The District retains the right to reject any and all proposals and to re-solicit if deemed to be in the best interest of the District.

**Questions** pertaining to the specifications may be emailed to Scott Reed, Director of Operations and Maintenance, at [swreed@mcps.k12.mt.us](mailto:swreed@mcps.k12.mt.us), no later than May 15, 2012.

Missoula County Public Schools  
Scott Reed, Director of Maintenance and Operations  
MCPS Business Building, 915 South Avenue West, Missoula, Montana 59801  
Phone 406-728-2400 x3032



Forward Thinking, High Achieving.

**REQUEST FOR QUALIFICATIONS (RFQ)  
COMPREHENSIVE LONG RANGE FACILITIES PLAN**

(version 10 May 1, 2012)

**Missoula County Public Schools**

915 South Avenue West

Missoula, MT 59801

406-728-2400, ext. 3032

**PROPOSAL DUE DATE/DELIVERY REQUIREMENTS- before 4:30 p.m. June 5, 2012**

**Provide one digital (pdf file on CD Rom or flashdrive) and one physical copy to:**

**Missoula County Public Schools**

**Business Services Office (Attn: Scott Reed)**

**915 South Avenue West, Missoula, MT 59801**

**FINALIST INTERVIEW**

Short-listed candidates selected upon review of response to RFQ may be contacted and interviewed in June/July 2012.

**AWARD OF PROJECT**

Successful candidate shall be notified in July/Aug 2012. Final Board of Trustees approval will be Aug-Sept 2012

**APPROXIMATE PROJECT SCHEDULE:**

RFQ Available	May 3, 2012
Deadline for RFQ Questions	May 15, 2012
MCPS Final Addendums/Updates	May 16-18, 2012
<b><u>RFQ Responses due</u></b>	<b><u>June 5, 2012</u></b>
Interview Invitations	June 15, 2012
<b>Interviews</b>	June/July 2012
Notify recommended Awardee pending Board approval	July/Aug 2012
<b>Board of Trustee approval of Awardee</b>	Aug/Sept 2012

Collection of data; Public/District Involvement Process	Oct/Dec 2012
Public Involvement	Jan/Mar 2013
<b>Present Comprehensive Plan Options &amp; Alternatives</b>	April 2013
Public Review of Options to identify preferred alternatives	May/June 2013
<b>Planning Committee selects preferred recommendations</b>	Aug 2013
<b>Preferred Plan recommendations to Board of Trustees</b>	Sept/Oct 2013
Final Comprehensive Long Range Facilities Plan document delivered	Dec 2013

## PROJECT BACKGROUND

Missoula County Public Schools serves 8,500 students in the Missoula and Seeley Lake, MT, communities. The District consists of 17 schools – nine elementary (K-5), three middle schools (6-8) and four high schools (9-12), an alternative high school program, adult education division, preschool program and vocational agricultural complex. The District also operates and maintains several parcels of vacant land, a business building, administration building, and several buildings rented to other organizations.

MCPS is committed to providing the highest quality education for all of its students. The District has five main goals that guide the development of its teaching and learning programs:

- Achievement and graduation for all students, regardless of their circumstances and abilities.
- Refine and implement a quality evaluation and supervision program for all staff.
- Define and implement a quality professional development program that encompasses best practice and supports the needs of all staff.
- Restructure the organization to become more efficient, effective and accountable to support the goals of the District.
- Cultivate and enhance staff, student, parent, business and community involvement.

In the 2011-12 school year, the District completed a 21<sup>st</sup> Century Comprehensive Educational Plan that now provides the vision for necessary educational facilities in the next 0-15 years. The 21<sup>st</sup> Century Model of Education is focused on six key elements: increase student engagement; transform learning environments; support early innovators; personalize professional growth; enhance communications; and collaborate with all stakeholders to make decisions.

MCPS must position its schools and facilities to support integration of the 21<sup>st</sup> Century Model of Education. The District seeks to establish a comprehensive facilities plan that identifies 5, 10 and 15 year recommendations for new construction, expansion, renovation and/or other options for buildings and properties in support of the educational vision developed through the 21<sup>st</sup> Century Model of Education. The plan must also identify the necessary technology infrastructure and backbone that will be required in all buildings to support the integration of existing and emerging technologies in classrooms.

The District will establish a Comprehensive Long Range Facilities Plan Committee to oversee the development of the Comprehensive Long Range Facilities Plan. The bulk of the community and District input to the facilities plan should be completed between October 2012 and March 2013. A wide range of input from district teachers, staff, students, parents, community members and organizations is necessary to identify issues and evaluate alternatives, as described in this RFQ. The RFQ is intended to provide a framework for proposals 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.

## RFQ SUPPORTING DOCUMENTS

**The following documents are available** - some online at this webpage:

<http://www.mcps.k12.mt.us/portal/Departments/BusinessServices/FacilityPlanRFQ/tabid/3499/Default.aspx>

- Exhibit A:** 21<sup>ST</sup> Century Model of Change: Completed in June 2011, this document details the new MCPS Education Vision and Model.

- Exhibit B:** Facility Condition Report and Assessment (FCR): This report, completed in 2009, provides a detailed description and assessment of the condition of facilities (i.e. boilers, rooms, foundations, classrooms, etc.).
- Exhibit C:** Demographics Study: A population age demographics study was completed in 2009.
- Exhibit D:** Facility and Property Report. Basic information about schools, date of building, square footage, history of renovations and other helpful data.
- Exhibit E:** Building Blueprints and Construction Documents. Not available online, but available for review upon request at the MCPS Business Building.

## **COMPREHENSIVE LONG RANGE FACILITIES PLAN GOALS**

1. Develop a Comprehensive Long Range Facilities Plan that addresses the facilities of the District over the next 5, 10 and 15 years to support and achieve the educational vision outlined in the 21<sup>st</sup> Century Educational Model of Education.
2. Develop and implement a community-based public participatory process to address shareholders' concerns and solicit input regarding district facilities and properties.
3. Identify facility needs based on the most recent demographic forecasts, enrollment projections, and technological and curricular trends.
4. Identify and evaluate costs and benefits of a broad array of options to meet current and projected facility needs.
5. Develop and provide options and alternatives, including construction, sale/trade/purchase, remodel, and/or maintenance, in regard to facilities and properties owned and operated by the District.
6. Facilitate committee process to bring consensus among Comprehensive Long Range Facilities Plan Committee members on selection of the most beneficial recommendations.
7. Upon approval by the Board of Trustees, develop action plans to support implementation of the approved recommendations.

## **SCOPE OF WORK**

### **PHASE 1: Data collection and analysis; community input and site-based planning**

Phase 1 includes collecting data and determining the overall process to engage all key stakeholders. An important component of the Comprehensive Long Range Facilities Plan will be an extensive community involvement process to engage District staff, teachers, students, parents and the community in identification of issues and needs and evaluation of options, proposals, priorities and preferences.

#### **TASK 1.1 Determine facility needs associated with 21<sup>st</sup> Century Model of Education.**

Consultant shall review the District's adopted 21<sup>st</sup> century educational model and engage in a process to gather staff input for determining specific facilities modifications needed to successfully implement the 21<sup>st</sup> century model in all buildings.

**TASK 1.2 Consider current trends in public school curricula, state and federal requirements, new teaching methods and district initiatives.** 21<sup>st</sup> Century Model of Education, International Baccalaureate Programme, Career Academies, Advanced Placement, Dual Credit, etc.—requiring specialized or additional facilities in the comprehensive facilities plan.

**TASK 1.3 Determine facility needs associated with implementation of current technology and associated with projected district technology purchases, implementation and future trends.** As part of this determination, consultants shall review the MCPS 21<sup>st</sup> century Model of Education, the District Technology Plan, the National Educational Technology Plan, and other national and international educational technology trends.

**TASK 1.4 Examine relevant demographic data and district enrollment projections and trends which may influence facility needs.**

**TASK 1.5 Examine Facilities Condition Report, current appraisals, real estate market analysis, building blueprints and other construction documents to help inform development of the comprehensive facilities plan.**

**TASK 1.6 Review current rental agreements and community use of facilities.**

**TASK 1.7 Explore possibility of using expanded community partnerships to fulfill district facility needs.** Possible partners to contact include the University of Montana, MCPS Adult Education Program, City of Missoula leaders and area hospitals.

**TASK 1.8: Engage all stakeholders and solicit input into development of comprehensive long range facilities plan.** Develop a multi-faceted approach to engage district staff, teachers, students, parents and the community in identification of needs, issues, priorities and preferences. Develop a detailed schedule for district and community involvement which shows key activities and/or major phases in relation to selection of preferred options/alternatives or drafting of final document. Include in schedule the types of input solicited from various groups, and how the input will be provided to the committee and trustees, and integrated into the decision process.

**Key stakeholders to include in the comprehensive long range facilities planning process:**

- District Staff and Officials
- Board of Trustees
- MCPS Administrators
- Board Appointed Committees and District Advisory Committees
- MCPS Certified and Classified Personnel, Bargaining Unit Leadership
- Director of Facilities and Maintenance & Operations Supervisors
- School sites and Site Advisory meetings

**Users of specialized facilities to be included in the comprehensive facilities planning process:**

- Music, performing arts, and visual arts teachers
- Humanities, science, math and language teachers
- Teacher-Librarians
- Athletics/Physical Education teachers
- Career and Technical Education teachers
- Special Education staff
- Adult and Continuing Education staff
- Business and Administrative Offices staff

**Current and potential governmental and community partners to be included in the comprehensive facilities planning process:**

- Missoula County elected leaders
- City of Missoula - City Mayor, Planning Director, Parks & Recreation Director, Health Department
- Chamber of Commerce, Downtown Association and other business organizations
- University of Montana

**Students, advocacy groups & community groups supporting schools included in the comprehensive facilities planning process:**

- Parent, Teacher and Student organizations, associations, or groups
- Minority and economically disadvantaged student & parent groups
- Special education students & parents

- Community organizations involved in schools (Flagship, YMCA, etc)

## **PHASE 2: Development of Comprehensive Long Range Facilities Plan Options, Requirements and Options**

Based on the data collection and analysis conducted in Phase 1, the consultant shall identify and evaluate costs and benefits of a broad array of options and alternatives to meet current and projected facility needs, including construction, sale/trade/purchase, possible partnerships and rental agreements, remodel and/or maintenance, in regard to facilities and properties owned and operated by the district. The consultant shall guide and facilitate the Comprehensive Long Range Plan Committee through a process to bring consensus on selection of the most beneficial recommendations.

### **TASK 2.1 Articulate proposals for renovation or additions to existing facilities.**

Consultant shall determine specific facilities modifications needed to successfully implement the 21<sup>st</sup> century model in all buildings. These proposals may include measures to make facilities more multi-purpose or adaptable, and energy efficient.

### **TASK 2.2 Articulate proposals and best practices for new facility construction.**

Consultant shall identify scenarios regarding facilities that are in significant need of repair or replacement, providing options and strategies based on costs, community input, historical significance, neighborhood character, and feasibility. Costs analysis shall be performed that will identify and support options for remodeling or new construction.

### **TASK 2.3 Articulate proposals and best practices for new site/facility acquisition.**

Consultant shall identify needs and areas for acquiring additional land and/or facilities.

### **TASK 2.4 Identify proposals for the sale, trade, maintenance, disposal of current facilities and properties rented to others (closed by the district, but rented to non-district tenants).**

### **TASK 2.5 Include cost/benefit assessment in all proposals.**

To aid in prioritizing, each proposal should be justified in relation to district initiatives and presented with a brief cost/benefit assessment which estimates all proposal costs, including construction, project management, dislocation and ongoing operations. Where there are a range of options to address a specific need, they should be identified.

### **TASK 2.6 Integrate sustainability and energy conservation in proposals.**

### **TASK 2.7 Present key options and alternatives to Comprehensive Long Range Facilities Plan Committee and to stakeholders. Facilitate process to bring committee members to consensus in their recommendations to the Board of Trustees.**

### **TASK 2.8 Present committee recommendations to Board of Trustees for final adoption.**

An essential task at the culmination of this phase is Board of Trustees adoption and any additional direction on the specific recommendations that will be included in the comprehensive long range facilities plan document.

## **PHASE 3: Drafting and Implementation of Comprehensive Long Range Facilities Plan**

After the District's Board of Trustees adopts the comprehensive long range facilities plan recommendations, the consultant shall provide a detailed document (plan) that outlines the selected recommendations in 5, 10 and 15-year action steps that support full integration of the recommendations.

### **TASK 3.1 Draft Comprehensive Long Range Facilities Plan Document and action steps.**

The various policies, strategies and specific recommendations selected by the committee and Board of Trustees shall be incorporated into a Comprehensive Long Range Facilities Plan document. The Plan will provide both broad policies and strategies, and where appropriate specific proposals which may include renovation, additions, changes of use, new site acquisition, new construction, joint use, changes in management or operations or additional planning and design. Where Board of Trustees and district staff have identified more than one possible approach to an issue, these shall be included to allow future flexibility.

**TASK 3.2 Board of Trustees adoption of final Comprehensive Long Range Facilities Plan document.** Consultant shall incorporate any final adjustments to the plan as required by the Board of Trustees.

## **ORGANIZATION OF SUBMITTAL PROPOSAL**

**Submit Proposal:** Prepare responses to “Contractor Profile & Approach to Project” (see below).

Proposals may be amended by fax if received prior to the submission deadline. It is the sole responsibility of the proposer to deliver the amendment. Amendments will not be accepted by email either before or after the submission deadline.

### A. Contractor Profile & Approach to Project—General

- 1) Quantity: One original print copy and one digital pdf copy on a CD-ROM or flashdrive.
- 2) Answer all items/questions or state “N/A” if not applicable.
- 3) Please number and re-state each subheading or question, followed by your response. This improves clarity and makes it much easier to evaluate your proposal.
- 4) Number all pages.

### B. Qualifications and Capability

- 1) General Firm Information
  - a. Type of Firm (corporation, partnership, sole proprietorship, joint venture)
  - b. Year Firm Established. Number of years your firm has been in business under its present business name
  - c. Other Firm Names. Indicate all other names by which your organization has been known and the length of time known by each name.
  - d. Parent Company. If applicable, state name, address, former name if applicable, tax identification number
  - e. Participating Division or Branch Offices. State division or branch offices that will participate in the development of the proposal, in its evaluation process, and/or in the conduct of any services provided (office name, and address).
  - f. Submittal. Submittal is for (parent company, subsidiary, division, branch office)
- 2) Experience of the Firm
  - a. Years in Educational Facility Planning Consulting Business.
  - b. Number and Value of Contracts. Indicate the number of educational facility planning consulting contracts actually implemented by your firm, each year for the past 5 years. Indicate the associated dollar value. (NOTE: If this response is submitted by a branch office or division of a parent company, indicate the number of projects that have been managed directly by the specific branch or division.)
  - c. Full-Time Personnel. Indicate the number of full-time personnel employed by your firm.

### C. Experience and Expertise

#### 1) Project History

- a. Briefly describe all educational facility planning consulting or related projects that your firm has managed within the last three (3) years. Identify project references that involve similarity in scope of work, number of schools, and number of students.
- b. Projects that have been managed by individuals who will be specifically assigned to this project should also be included and identified.
- c. If you include projects/contracts managed by team members or subcontractors or by your employees while employed by other firms, clearly indicate the name of the company that was responsible for the project.

#### 2) Include the following information on each project (*no preferred format*):

- a. Project Identification. Name of project owner, type of project (PK-12 school, university, other academic setting, etc), location (city, state)
- b. Project Dates. Contract start and end dates
- c. Project Size. Number of students, schools, and the total project cost
- d. List of Accomplishments. Type of services rendered and accomplishments achieved as a result of the consultation
- e. Project and Budget Schedule. Indicate if the project was completed on schedule and if within budget. If not, please explain.
- f. Comments. Comment on any special features, services, conditions, etc
- g. References. Names and contact information of owner(s)' representatives who can serve as references

#### 3) Personnel Information.

- a. Qualifications and Experience. Describe the number and experience of the staff you currently have to provide educational facility planning consultant services. Associate the current staff with the projects submitted in the references provided previously.
- b. Areas of Expertise. List all areas of expertise related to educational facility planning.

#### 4) Sample of Previous Work—Using a previously cited reference, provide the following:

- a. Detailed scope of work
- b. Process used to complete the scope of work to include timelines, assessments, facilitation if required, and plan
- c. A copy of the final report

### D. Proposed Project—Delineate the approach your firm would use in providing the services as specified in the scope of work. Specifically address the following considerations:

- 1) Participation by which members of the firm and the services they would perform.
- 2) Description of the processes to be used to provide the services as outlined in the scope of work.
- 3) Timeline for the work to be performed. Include those activities which you would expect MCPS to perform.
- 4) All requirements for MCPS.
  - a. Identify groups and the anticipated number of meetings
  - b. Administrative
  - c. Contacting and organizing work groups
  - d. Facility requirements
  - e. Information



~~5) Cost to provide the services as outlined in the scope of work. (removed per Addendum #1)~~

**Award of the Contract:** MCPS will use a three step process to award the contract.

A. Determination of Responsiveness.

- 1) Proposals must be prepared as described in *Contractor Profile & Approach to Project*. The first step will be a determination if the proposal is responsive. The purpose of this step is to determine if the firm possesses the requisite experience and capacity to perform the services as specified in the scope of work and as demonstrated in the proposal.
- 2) For a proposal to be determined responsive it must meet each of the following qualifications:
  - a. Be submitted on or before the time specified in the Request for Qualifications
  - b. Signed by the Owner or an Officer in the case of a corporation
  - c. Indicate the addendums received by number
  - d. Follow the format published in the RFQ
  - e. Include all information requested
  - f. Demonstrate the experience and capacity to perform the services required in the scope of work
- 3) MCPS reserves the right to waive any technicality or informality in the proposal process which is not of substantial nature.
- 4) All proposals which are determined to be responsive will be moved to the evaluation of written proposal stage. All firms whose proposals were not found to be responsive will be notified.

B. Evaluation of Written Proposals. An evaluation team will review and score written proposals based on the following evaluation criteria:

- 1) Experience ~~—30%—~~ 50% (change per addendum #1)
  - a. Projects of similar scope of work
  - b. Key consultant(s) experienced in similar scope of work
  - c. Working with different groups –Board of Trustees, administration, parents, community, etc.
- 2) Project – 50%
  - a. Focus on outcomes and process as identified in the scope of work
  - b. Methodology to accomplish the outcomes
  - c. Achieving buy-in from all identified groups
  - d. Deliverables

~~3) Total Cost – 20% (remove per addendum #1)~~

- C. Based on the overall score, proposals within the competitive range will be identified. All firms whose proposals were not found to be in the competitive range will be notified.
- D. Structured Interviews. Contractors with proposal scores in the competitive range will be interviewed by the project evaluation team along with representatives from other constituencies. Questions to be answered and the method of scoring interviews will be determined and announced at the time companies are invited to the structured interviews. The interview provides the opportunity for the contractor to address questions and to more fully describe how the approach to this project satisfies the evaluation criteria. Contractor representatives at the interview must include those individuals who will be key points of contact and have major responsibility for contract execution. Interview

scores will be ranked and the top-ranking contractor from the interview process will be considered for contract award.

- E. Final Selection. Final reference checks will be conducted with the apparent awardee prior to making the final selection. An award will be made to the selected contractor pending Board of Trustee approval.

**Other RFQ Issues:**

- A. Approval of Awards – MCPS is regulated by the Montana Code Annotated (MCA). A requirement of the MCA is the Board of Trustees must approve award of contracts in excess of \$50,000. This approval will include the selection of the contractor. Given this legal requirement, the selected contractor should refrain from proceeding with work until the Board of Trustees has acted and an agreement has been signed.



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# MISSOULA COUNTY PUBLIC SCHOOLS

Business Building  
915 South Avenue West  
Missoula, MT 59801

Phone 406/728-2400 Fax 406/549-0449 www.mcps.k12.mt.us

MAY 16, 2012

Request For Qualifications: MCS Long Range Facility Plan

## ADDENDUM #1: CHANGE PRICING REQUIREMENTS

### Introduction:

Section 20-6-633 Montana Code Annotated, states that certain professional services must be selected before compensation is negotiated. In order to comply with this requirement, ADDENDUM #1 is submitted.

### *Change "A":*

Reference "ORGANIZATION OF SUBMITTAL PROPOSAL" section D, number 5 (top of page 8): remove.

~~5) Cost to provide the services as outlined in the scope of work~~

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### *Change "B":*

Reference AWARD OF THE CONTRACT section B, number 3: remove.

~~3) Total Costs - 20%~~

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### *Change "C":*

Reference AWARD OF THE CONTRACT section B, number 1:  
Change:

1) Experience – ~~30%~~>> change to 50%

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Summary of Addendum #1.

It is the intent of MCPS to select based on **qualifications** per MCA.

Per Department of Revenue form AB-30R, Missoula County Public Schools is requesting a Real Property Tax Exemption for the below listed property:

GEOCODE 04000022301010000

Legal: MONTANA ADD, S22,T13 N, R19 W, BLOCK 031, LOT 005, MONTANA - LOTS 5&6 BLK 31

Address: 820 S Higgins Ave  
Missoula MT 59801

This property is located adjacent to Hellgate High School and will be used as a school related parking lot for students and staff. No public or private parking will be allowed. MCPS request property tax exemption for this property.

If you have any further questions, please contact me at the numbers listed below.

Sincerely,

Scott W. Reed  
Director of Operations and Maintenance

(w) 406-728-2400 x3032  
(c) 406-240-3419