

# **REQUEST FOR QUALIFICATIONS**

**Capital Planning Services  
for the  
Wenatchee School District**

**DUE: December 19, 2023, 4:00 P.M. to**

*Wenatchee School District  
Attn: Dr. Kory Kalahar, Superintendent  
235 Sunset Avenue  
Wenatchee, WA 98801*

**RELEASE DATE: December 1, 2023**

**DISTRICT CONTACT:**

*Dr. Kory Kalahar, Superintendent - (509) 663-8161 ext. 33223 - [kalahar.k@wenatcheeschools.org](mailto:kalahar.k@wenatcheeschools.org)*

## **I. Advertisement**

Wenatchee School District “District” is requesting proposals for Pre-Bond Consulting services for creating a Capital Projects Program “Program”. It is the intent of the District to select a “Consultant” to assist with leading facilities committees, preparing timelines, prioritization of current and future capital projects, and preparing documents and strategies for potential bond or levy measures. The complete FRQ is available at [wenatcheeschools.org](http://wenatcheeschools.org).

## **II. Introduction**

The Wenatchee School District (“District”) is requesting proposals from consultants interested in providing planning for its Capital Projects Program. Based on the results of any such capital bond or levy measure, and facilities planning services, the District may continue its relationship with the selected Consultant to provide Owner Representative project management services during the design and construction phases of its potential capital facilities projects.

The District will consider proposals from consultants to support the District in the implementation of facilities planning and the administration of preliminary design and other consultant contracts needed after completion of the planning effort. The District reserves the option to request additional project management services from the selected Consultant, as the District determines are necessary. Proposals will identify the qualifications and roles of persons to perform the requested services. The District intends to select and engage one Consultant.

## **III. Background**

The District is considering requesting community support in the future for a Capital Bond to address aging facilities and infrastructure, safety and security system improvements, and other capital facility needs. The District is seeking professional services to assist with planning, implementation and development of its short-term and long-term Capital Projects Program.

## **IV. Project Information**

Pre-bond management services are needed to facilitate pre-bond planning in conjunction with District staff, with assistance from the District’s Facilities Committee and Bond Advisory Committee. Services will include facilities planning and community engagement, program master schedule development, concept design, cost estimating, building assessments, standards development, short- and long-range planning and prioritizing of facility projects, and recruitment and selection of consultants to potentially provide other services. The District may extend services to include administration of permitting, design, construction, commissioning, and occupancy for any projects that become part of the Program.

The District anticipates contracting with the selected Consultant on a lump-sum basis, plus reimbursable expenses for the services noted above. The District may extend project management services to support later phases of the Program.

## **V. Scope of Work**

The District anticipates the following Project tasks:

- Engage a community and District staff-based committee in a facilities-planning process that supports current and anticipated educational programming and is reflective of key enrollment

and utilization measures. Include data on both physical as well as functional adequacy against current and anticipated programming.

- Assist the District in establishing an overall management plan, proposing team member roles and responsibilities, and priorities and timelines.
- Facilitate meetings with District staff so that they gain an understanding of the District's Facility Plan and the needed capital projects.
- Facilitate public meetings to engage the community in gaining an understanding of the District's Facility Plan and the needed capital projects.
- Prepare a District facility timeline for the next 10 years.
- Assist the District with developing and analyzing a community survey. Other tasks as agreed upon between the District and the Consultant.
- Assist the District in the selection of an architect and/or general contractor that can best execute the District's Facilities Plan developed as part of this effort.

Services are anticipated to occur between approximately February 2024 and February 2025. The District shall not be bound to continue work with the selected Consultant beyond the scope of work.

## **VI. Selection Process**

### **A. Method of Selection**

The District will convene a Selection Committee to review the proposals received and reserves the right to seek clarification(s) about the proposals.

The District may award a contract based solely on the written proposals. However, the District may request one or more consultants be interviewed for further evaluation.

The District may elect to engage in negotiations with a selected short list of consultants, in order to improve the proposals and obtain terms suitable to the District. The District reserves the right to request post-proposal modifications.

The District reserves the right to include in any contract with a selected consultant a provision for additional project management services as identified in the facilities plan, where such provision will be contingent on agreement to terms regarding such continued work and other factors determined by the District.

An initial screening of the proposals will be conducted based on the criteria set forth below. Proposals that do not meet the criteria will not be considered further, unless the District waives any defects.

The District reserves the right to select a single consultant for negotiation toward a contract based solely on the written proposals and not to enter further discussions or negotiations.

The District reserves the right to meet with responding consultants and conduct interviews and/or negotiations based on the proposals in order to select the best proposal with all factors considered. As part of such negotiations, the District may require key personnel assigned to the contract to be present, and discuss a consultant's approach to project management.

The Selection Committee will make a recommendation to the Board of Directors regarding a successful Consultant. The District reserves the right to negotiate with the successful Consultant on pricing, scheduling, and other terms.

## B. Initial Screening Criteria

### Qualifications - (100 points)

Consultant Overview: Provide a brief narrative describing the Consultant's origin and experience providing services in the region.

Consultant's Experience (25 points): This section should detail the background and qualifications to establish the Consultant's experience and performance in the management of projects similar to the District projects within the past ten (10) years. Please include answers to the following questions:

- Experience in supporting districts with programming and data-based facility master plans.
- Experience in creative financing solution development as part of the facility planning process.
- Experience in performing pre-bond and planning services.
- Experience in managing other projects similar in scope and type, including location of each project and contact information of client.
- Experience in managing projects on occupied sites.
- Experience working with School Districts in Washington State.
- Explain your approach and expertise in providing project controls including schedules, budgets, invoicing and document controls.

Staffing (25 points): This section should contain detailed and specific discussion of the Consultant's proposed management staffing and reporting relationships for this project.

- Capacity to staff with competent and experienced personnel for bond and facility planning services.
- Capacity to provide full project management services upon bond passing if desired by the District.
- Include names of key staff within your organization and all staff members assigned to this Project.
- Provide an organizational chart describing your organization as it relates to this Project. Provide resumes of all key staff, including their years of direct relatable experience in the industry, relevant project experience, and duties/responsibilities.
- Provide a list of all key staff and any sub-consultants to be utilized on the Project. Outline the commitment of time (man-hours) spent on-site and throughout each phase of the Project.

Approach and Methodology (25 points): This section should provide detailed discussion of the philosophy of management which you have applied to similar Projects, including a brief discussion of your involvement from the beginning of a Project through the completion of construction and warranty period of all projects.

- Address your approach to engaging students, staff and community as it relates to development of the facilities plan.
- Address your approach to development of the short- and long-range facilities plan.
- Address your approach in assisting in the selection, management and execution of services of both the architect and general contractor.
- Address your approach on how you may support the District's desire to maximize the opportunity for local contractor and vendor involvement, when possible.

**Past Projects (15 points):** Present the past performance with the District or on similar contracts regarding facility and bond planning, cost analysis, project management, quality of work, and compliance with schedules. Greater weight will be given based on successful passage of bonds in the last three years.

**References (5 points):** Provide three (3) references of prior districts where you have developed a Facilities Plan and guided the District through the pre-bond planning, including selection and management of an architect and/or general contractor.

**Additional Information (5 points):** Describe any systems or procedures utilized in managing school projects, as well as the nature of the system and/or procedures that provide the District management of time, cost, quality, and scope controls.

**Insurance:** The Consultant must demonstrate and maintain a minimum of \$2,000,000 general liability insurance coverage for the duration of the Project by including an insurance certificate indicating the insurance company’s address and point of contact.

Based on the recommendation of the Selection Committee and approval by the Board of Directors, the District will enter into contract negotiations with the selected Consultant.

**C. Schedule for Selection Process**

Dates	Selection Process
December 1, 2023	Advertisement for Request for Proposals Published
December 19, 2023	Proposal due on or before 4:00 P.M.
December 20, 2023: screening January 3 - 4, 2024: interviews	Screening/Interviews
January 23, 2024	Board approval of selected finalist
January 5, 2024	Notifications of selected finalist sent to Consultants
January 9 - 16, 2024	Negotiation of contract
January 23, 2024	Notice to Proceed

The District may adjust the above schedule. In the event of a schedule change after submission of proposals, the District will inform consultants that have submitted proposals of the changes.

**D. District’s Right to Reject**

The District reserves the right to reject any and all proposals and re-advertise the Request for Proposals at any time prior to approval of a contract with the selected Consultant. All costs incurred in the preparation of the Request for Proposals process will be borne by the proposing Consultant. Proposals submitted in response to this Request for Proposals will become the property of the District and be considered public documents under applicable Washington State laws; such documents are subject to disclosure in response to public records requests under the Public Records Act, Chapter 42.56 RCW. The District also reserves the right to modify the scope of services as a result of the written submittals and/or interviews.

**E. Compliance with Procedures**

The proposal of any consultant failing to submit information in accordance with the procedures set forth herein may be considered non-responsive. Failure to comply with these procedures may result in the rejection of such a proposal.

**VII. Submittal Requirements**

Proposals must be submitted via email to:

Dr. Kory Kalahar, Superintendent  
[Kalahar.K@wenatcheeschools.org](mailto:Kalahar.K@wenatcheeschools.org)

AND

Sean Fitzgerald, Executive Director of Business & Finance  
[Fitzgerald.Sean@wenatcheeschools.org](mailto:Fitzgerald.Sean@wenatcheeschools.org)

The District must receive proposals no later than December 19, 2023 on or before 4:00 P.M.

Proposals received after the time specified will be returned to the proposer via email.

This solicitation does not commit the District to pay any costs incurred in the preparation, presentation, or return of submittals, including interview time, or to select any Consultant who responds.

In preparing the submittal, the proposing consultant will clearly identify the designated person of record responsible for any referenced project. If the proposing consultant is representing an individual's experience while employed with another consultant, the consultant of record for the project and the individual's role will be clearly identified.

Any questions or requests for clarification regarding this Request for Proposals during the submittal preparation period must be sent via email to [kalahar.k@wenatcheeschools.org](mailto:kalahar.k@wenatcheeschools.org) and [fitzgerald.sean@wenatcheeschools.org](mailto:fitzgerald.sean@wenatcheeschools.org).

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