



**Middleton-Cross Plains  
Area School District**  
inclusive. innovative. inspiring.

***REQUEST FOR PROPOSAL***  
***FOR***  
***DESIGN (ARCHITECTURAL & ENGINEERING) SERVICES***

***Prepared by:***  
Middleton-Cross Plains Area School District  
7106 South Avenue  
Middleton, Wisconsin 53562

***December 14, 2016***

## **Request for Proposal - Design Services**

The Middleton-Cross Plains Area School District (District) is accepting written proposals from qualified firms to provide design (architectural and engineering) services.

Sealed proposals shall be submitted no later than 2:00 p.m. on January 20, 2017 to the Middleton-Cross Plains Area School District, ATTN: Lori Ames, 7106 South Avenue, Middleton, WI 53562. Proposals shall be clearly marked on the envelope as "PROPOSAL FOR DESIGN SERVICES". A recommendation will be submitted to the Board of Education at their regular meeting on February 13, 2017.

Lori Ames  
Director of Business Services

## **I. Purpose and Objectives**

The purpose of this Request for Proposal (RFP) is to obtain proposals from qualified design firms (herein referred to as “A/E”) interested in contracting with the Middleton-Cross Plains Area School District (herein referred to as “District”) to provide desired services as outlined in this RFP.

The District has identified the following objectives:

- to ensure all facilities allow for equitable access to education across the district;
- to maximize efficiency in facilities utilization across the district;
- to address identified facility/space needs in the District in an efficient and cost-effective manner;
- to significantly reduce the carbon footprint required to construct and operate its facilities (commitment to sustainability);
- to provide educational facilities that support 21<sup>st</sup> Century learning.

## **II. Background**

The Middleton-Cross Plains Area School District, located in Dane County, serves approximately 7,100 students in grades PreK-12. The District has ten school facilities - six elementary schools (grades K-4), two middle schools (grades 5-8), a high school (grades 9-12), and a charter high school (grades 9-12).

Following a comprehensive review of enrollment and facility needs, the Board of Education authorized a two question referendum to be held on November 6, 2012. The first question involved the construction, partial remodeling, and equipping of Kromrey Middle School as well as the construction of an addition to and the remodeling and equipping of Glacier Creek Middle School. The second question involved a recurring exemption to the revenue limit for the operating expenses resulting from the addition to Glacier Creek Middle School and the construction of Kromrey Middle School. Construction on both of the District’s middle schools allowed the District to move 5<sup>th</sup> grade from all of the elementary schools to the middle schools, alleviating capacity concerns at both the elementary and middle levels. Both questions passed with percentages of over 60%.

QUESTION #1 – Yes 14,797 (68.36%) No 6,848 (31.64%) - \$59,860,000

QUESTION #2 – Yes 13,881 (63.58%) No 7,953 (36.42%) - \$797,000

Since the construction at both middle schools, the District has seen significant increases in K-12 resident enrollment.

| Year    | Resident K-12 Student Enrollment | Difference |
|---------|----------------------------------|------------|
| 2013-14 | 6,178                            | n/a        |
| 2014-15 | 6,292                            | +114       |
| 2015-16 | 6,472                            | +180       |
| 2016-17 | 6,723                            | +251       |

As a result of this significant enrollment increase, the Board of Education directed Administration to bring together a Community Facilities Planning Committee. The Committee consists of approximately 20 community members. Six Administrators are present and provide resources or answer questions as necessary. The Committee first met in September, 2016. The first four meetings have involved sharing facility, demographic, and enrollment information with the committee.

To assist the Committee in their review of the District's long term facility needs, Administration contracted with Mark Roffers of MDR Consulting to perform a community growth analysis for the District. A preliminary draft of his findings are included with this RFP. Preliminary results show that the District will continue to see enrollment growth, but not at the rate experienced in the last three years.

In addition to the community growth analysis, Administration created a "Facility Status Report" that provided basic information such as acre per site, square footage, capacity, and building composition for each building within the District. This report is also attached with this RFP.

The Committee's goal is to create options that meet the District's long term facility needs by late summer 2017. Working with School Perceptions, Administration would survey the community on the various options to inform the Board of Education when formulating referendum questions. The District may have the opportunity to go to referendum as early as April, 2018, but would most likely plan for a referendum in November, 2018. The District would like occupancy of any renovation or construction no later than summer, 2020.

The District would like assistance from both an A/E and construction manager in developing options for the Board of Education to address the District's facility needs. It is the District's intent to utilize an integrated project team delivery approach (District, A/E, and Construction Manager). The District will issue a RFP for Construction Management (CM) Services following selection of the A/E.

### **III. Scope of Services**

The following scope of design services, including structural, mechanical, electrical & plumbing engineering services, site/civil engineering services, energy modeling/analysis and food service consultant, shall be provided by the A/E:

#### **Pre-Referendum / Referendum Assistance Phase (Phase I)**

The A/E shall assist the District in the community engagement process (with the goal of determining which facility option to include on the referendum) and referendum campaign process. This assistance includes but is not limited to attending planning meetings with District officials, participating in meetings with the public, preparing concept drawings, helping with the development of informational presentations and materials, and conducting research or gathering information related to the proposed project.

#### **Concept/Schematic Design Phase (Phase II)**

Refine program, space needs and project scope. This phase will involve meetings with school staff, students, parents, community members and local governmental officials for program development/refinement. For each component in the project, determine relationships of proposed new spaces to existing building (where applicable) and site.

#### **Design Development Phase (Phase III)**

After approval and acceptance of the end product from Phase II by the District, the A/E will work to create detailed plans for building elevations, material selections, mechanical systems, plumbing systems, electrical/control systems and final design. Several revisions of the plan may be needed as the project is developed during this planning stage. The A/E shall provide energy modeling for mechanical and other buildings systems under consideration. The A/E will then prepare a final design plan based on the input received from the District and any applicable governmental agencies responsible for project approvals.

#### **Construction Documents (Phase IV)**

After approval and acceptance of the end product from Phase III by the District, the A/E will be responsible for preparation of the applicable architectural/engineering drawings and plan documents, e.g. site plan, MEPs, and structural plan.

After final approval of the architectural drawings and plan documents by the District, as well as the appropriate municipal commissions and other governing bodies, the A/E will create detailed construction documents and specification documents for bidding purposes.

The final construction documents shall include as a minimum: Site Plan, Landscaping Plan, Stormwater Management Plan, Roof Plan, Drainage Plan, Floor Plan(s), Exterior Elevations, Building Sections, Foundation plan, Framing Plan(s), Details, Plumbing Isometrics, Door/ Window/ Room Finish/ Header/ Plumbing/ HVAC/ Electrical

schedules, HVAC Plans, Electrical Plans, Submittal Worksheets and the project manual including Specifications in the CSI sixteen division format.

**Bidding & Contract Award (Phase V)**

The A/E will assist the District and Construction Manager in bidding the project to prospective contractors. Services will include assisting the CM with the distribution of plans and specifications, assisting with sub-contractor pre-bid meetings, assisting with formulating responses to prospective bidders' questions, issuing addendums (if necessary), attendance at the bid opening, and providing the District with a recommendation for contract awards.

**Construction Administration & Project Closeout (Phase VI)**

The A/E shall be a representative of and shall advise and consult with the District during construction until the final payment to the Contractor is due and during the correction period described in the Contract for Construction.

a. Plan Approvals

The A/E is responsible for the procurement of ALL plan approvals from the local municipality(ies), Dane County, and the State of Wisconsin Department of Commerce, Safety & Building Division for the building(s) including, but not limited to, Stormwater Management, HVAC, Plumbing and/or Fire Protection.

b. Construction Related Services

The A/E will provide on the owner's behalf, construction administration and inspection services. At a minimum, services to be provided consist of coordinating regular progress meetings, review of shop drawings, assist owner in color and finish material selection, undertake construction observation, process certificates for payment to Contractor, and facilitate preparation of final record drawings, warranty follow-up and project closeout.

**The A/E, in conjunction with the Construction Manager, shall provide updated budgetary cost estimates during each phase of the design process.**

**IV. Design Guidelines**

The District will require the A/E to integrate sustainable principles/design into the District's projects. The A/E shall apply/utilize standards found in the Leadership in Energy & Environmental Design (LEED™) Green Building Rating System, Declare, Cradle to Cradle or other nationally recognized sustainability program/certification. The District may consider pursuing LEED or other sustainability program certification. The District may engage the services on an independent commission agent/authority.

The A/E shall integrate 21<sup>st</sup> Century learning concepts into the program and design of all projects.

The A/E shall include options in the program and design to provide more expansive community access and use.

**V. Project Timeline (assuming successful referendum in April or November 2018)**

The project(s) must be totally completed and approved for occupancy no later than August 1, 2020 assuming passage of the referendum in April or November, 2018. The District's expectation during the construction/renovation process is to minimize disruption of the educational process. The A/E shall develop preliminary project timelines (and related expectations or obligations of the District) which project completion by August 1, 2020.

**VI. RFP Timeline**

- RFP issued 12/14/16
- Last date/time to submit questions regarding RFP 1/6/17 @ 1:00 p.m.
- Voluntary meeting to answer questions related to the RFP 1/9/17 @ 1:00 p.m.
- Proposals due to District 1/20/17 @ 2:00 p.m.
- Review RFP responses and select which firms will be invited to participate in presentation/interview process 1/30/17
- Notify firms selected to participate in presentation/interview process 1/30/17
- Presentation/Interviews 2/7/17 or 2/8/17
- Select firm 2/9/17
- Approval of firm by Board of Education 2/13/17

**VII. Informational Meeting**

The District will hold a voluntary informational meeting on Monday, January 9, 2017 at 1:00 p.m. to address vendor questions and provide, as needed, clarifications to firms interested in submitting a proposal to the District. The meeting will be held at the Middleton-Cross Plains Area School District Administrative Center, 7106 South Avenue, Middleton.

**VIII. Firm Profile**

Respondents to this RFP shall include the following minimum information in their proposal:

- a. General qualifications: describe the general qualifications of the firm(s).
- b. Special qualifications: describe any special or unique qualifications of the firm(s) as they relate to this project including, but not limited to, experience with pre-referendum assistance, sustainable/green building design and school facility designs.

- c. Staff qualifications: submit resumes demonstrating relevant experience of key personnel to be assigned to this project. Specify the role of each key staff member in the project.
- d. Previous experience: provide a list of clients, including name, address, contact person and telephone number for whom similar or related design services (for elementary and middle school facilities) that have been provided within the last five years. Include a short description of the project(s), the name of the project manager(s), and other staff members that were assigned and their role(s) in the project.

## IX. Proposal Response

Respondents to this RFP shall also include the following minimum information in their proposal:

- a. Describe how they will organize and perform the work described in the Scope of Services section. List the names of any sub-consultants that are intended to be used on the project and the specific services to be provided the sub-consultant(s).
- b. Describe their understanding of the project and the planned approach to achieve the goals of the project. **Submittal shall include a listing of contemplated tasks and number of estimated hours by personnel classification / discipline for each phase of the project.**
- c. Describe sustainable or “green” design experience as well as experience working with Focus on Energy.
- d. Include conceptual time schedules and related expectations / obligations of the District needed to complete the scope of work specified based on occupancy for all projects by August 1, 2020 (based on passage of a referendum in April or November 2018).
- e. Provide a fee proposal using the attached fee proposal spreadsheet. **Fees shall include ALL meetings needed to successfully complete this project and ALL reimbursable costs other than plan/document printing costs (incurred for the bidding phase of the project) and required plan submittal fees.**
- f. Provide a description of any possible additional related costs and/or fees (not included in your base fee) that the District might incur as a result of this design process.
- g. Provide a description of monthly status reports, e.g. project timeline, deliverables, costs incurred to date, and costs to project timeline.



## **X. Proposal Evaluation / Selection Process**

The responses will be reviewed an evaluation panel consisting of individuals selected by the District.

Responding firms will bear all costs of this RFP and interviews, if any.

Proposals will be reviewed using the following criteria / elements:

- Conciseness, responsiveness and completeness of the proposal to the information requested, objectives, and deliverables as outlined in the RFP
- Fee Proposal/Cost: Overall fee / billing rates
- Prior experience, Qualifications, References, Past Performance of A/E
- Experience/Expertise in K-12 School Projects (with an emphasis on secondary level education)
- Experience with Sustainable or “Green” Design
- Level of Innovation with a Focus on 21<sup>st</sup> Century Learning
- A/E Firm’s Technological Capabilities (to manage this project in a paperless or almost paperless manner)

At the District’s discretion, to further assist in evaluation, some, one, or all of the responding firms and/or individuals may be requested to participate in an interview process. The interview will be used as another opportunity to clarify any issues within a given response and explore the approaches that may be used to satisfy all requirements for the District.

Upon the completion of the selection process, the District shall notify the firms of the selection and the successful firm to enter into an agreement. Firms shall submit fee proposal using the Fee Proposal Form provided with this RFP. At the District’s discretion, it may directly negotiate with the best qualified A/E on final scope and budget.

The District may also consider alternative proposals to provide engineering services if there is an opportunity for substantive savings (without adversely affecting the project timeline or quality) and other significant benefits (to be clearly articulated by the proposer and be measurable) accruing to the District.

The District may investigate the qualifications of any individual or firm under consideration, require confirmation of information furnished and require additional evidence of qualifications to perform the services described in this RFP. The District also reserves certain rights, including, but not limited to, the following:

- a. Reject any or all of the proposals
- b. Issue subsequent Requests for Proposals
- c. Cancel the entire Request for Proposal
- d. Remedy technical errors in the Request for Proposal process
- e. Appoint evaluation committees to review qualifications and proposals
- f. Seek the assistance of outside technical experts in evaluation
- g. Approve or disapprove the use of particular subcontractors
- h. Establish a short list of firms eligible for discussions after review of RFP
- i. Negotiate with any, all, or none of the firms
- j. Solicit best and final offers from all, some, or one of the firms
- k. Award a contract to one or more firms
- l. Waive informalities and irregularities in RFP
- m. Award without discussion

Selection will be based upon a determination as to which proposal is in the best interest of the Middleton-Cross Plains Area School District. Any decision made by the District, including the selection of vendor, shall be final and is NOT subject to appeal.

This RFP shall not, in any manner, be construed to be an obligation on the District to enter into a contract or result in any claim for reimbursement of cost for any efforts expended in responding to the RFP or in anticipation of any contract.

## **XII. Submittal Requirements**

**Any questions concerning this RFP must be submitted via e-mail on or before January 6, 2017 at 1:00 p.m. to:**

Lori Ames, Director of Business Services  
Middleton-Cross Plains Area School District  
E-mail: lames@mcpasd.k12.wi.us

**All responses to this RFP shall be received by the District no later than 2:00 p.m. on January 20, 2017. Five (5) copies of your proposal are requested.**

Responses to this RFP should be delivered to:

Lori Ames, Director of Business Services  
Middleton-Cross Plains Area School District  
7106 South Avenue  
Middleton, WI 53562

**Proposals shall be marked "Proposal for Design Services" and shall clearly identify the firm submitting the proposals.**

Proposals received after the date and time specified will be returned unopened. All proposals will become the property of the Middleton-Cross Plains Area School District.

**MIDDLETON-CROSS PLAINS AREA SCHOOL DISTRICT  
Design Services RFP**

**FEE PROPOSAL FORM**

**Name of Firm:** \_\_\_\_\_

**Address:** \_\_\_\_\_

\_\_\_\_\_

**Contact:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_

**Fax:** \_\_\_\_\_

**E-mail:** \_\_\_\_\_

**Please state the fees for this project below:**

FEE FOR PRE-REFERENDUM / REFERENDUM ASSISTANCE

(PHASE I) AND CONCEPT / SCHEMATIC DESIGN (PHASE II)

Fee shall be expressed as a flat dollar amount (there shall be no

reimbursables allowed - all costs shall be included in your fee)

\$ \_\_\_\_\_

If our referendum is approved, will any of the fee paid for the Pre-Referendum / Referendum Assistance and Concept / Schematic Design phases be applied as a credit to the remaining phases of the project?

No \_\_\_\_\_

Yes \_\_\_\_\_ How much will be credited? \$ \_\_\_\_\_

FEE FOR REMAINING PHASES OF PROJECT - DESIGN DEVELOPMENT,

CONSTRUCTION DOCUMENTS, BIDDING & CONTRACT AWARD,

AND CONSTRUCTION ADMINISTRATION & PROJECT CLOSEOUT

Fee shall be expressed as a percentage of total construction costs for the

Project including change orders (the only allowable reimbursables will be

plan submittal fees and plan printing costs in the Bidding & Contract Award

phase - all other costs shall be included in your fee)

\_\_\_\_\_ %

The undersigned attests that the information contained within the proposal is accurate to the best of his/her knowledge, and that the firm he/she represents, if selected, agrees to incorporate the requirements of this RFP in the final contract with the District:

Signature of Person Authorized to Submit Proposal: \_\_\_\_\_

Typed Name of Signature Above: \_\_\_\_\_