

**BAXTER COMMUNITY SCHOOL DISTRICT
REQUEST FOR PROPOSALS
PROGRAMMING, ARCHITECTURAL DESIGN, & CONSTRUCTION CONTRACT ADMINISTRATION SERVICES**

The Baxter Community School District is requesting qualified persons, firms, partnerships, or corporations to submit a proposal for Project Architect to provide programming, architectural planning and design services, construction contract administration services, and closeout services to the District for the demolition of the existing 1916 and 1924 buildings and construction of a new office/classroom addition on the existing campus site located in Baxter, Iowa.

To assist in the planning and execution of this work, Baxter CSD has hired Story Construction as the Construction Manager Owner's Agent to lead, administer project schedule including preconstruction, and direct construction activities. Story Construction will be administering this RFP in support of the District and will manage activities throughout design and construction. Story Construction will utilize lean practices to achieve project efficiency and streamlined coordination. The agreement will be executed between Baxter CSD and the Architect directly.

Respondents to this RFP should mail or deliver ten (10) bound copies along with a copy of the submittal as a single document in Portable Document Format (PDF) format electronically on a CD or other electronic media, as further described herein, in a sealed envelope clearly marked "Proposal for Architectural Design Services" to:

Baxter Community School District
202 East State Street
Baxter, IA
Attn: Todd Martin, Superintendent

Proposals shall be delivered no later than 2:00 p.m. central time on Thursday, May 24, 2018. A pre-submittal conference will be held on Tuesday, May 15, 2018, at 1:00 p.m. central time in the Board Meeting Room at the District Office in Baxter, Iowa.

All questions regarding this RFP shall be sent to Brant Carr brant.carr@storycon.com with Story Construction by 2:00 p.m. central time on Friday, May 18, 2018. All questions, and responses to all questions, will be posted on the District website: www.baxter-iowa.com/schools/district on or before 5:00 p.m. on Monday, May 21, 2018.

ALL RESPONSES ARE DUE BEFORE 2:00 P.M. CENTRAL TIME ON MAY 24, 2018. IT IS THE RESPONSIBILITY OF THE RESPONDENT TO ENSURE ITS RESPONSE IS RECEIVED BY THIS DEADLINE. RESPONSES SUBMITTED AFTER THE DEADLINE WILL NOT BE ACCEPTED. FAX OR EMAIL RESPONSES WILL NOT BE ACCEPTED.

RFP Submittal process schedule:

- RFP posted to District Website: May 3, 2018
- Pre-Submittal Conference: May 15, 2018 at 3:30 p.m.
- Questions Due: May 18, 2018 by 2:00 p.m.
- Responses to questions posted: May 21, 2018 by 5:00 p.m.
- Proposal due: May 24, 2018 prior to 2:00 p.m.
- Interviews with short-listed firms conducted by District selection panel: June 7-14, 2018 (as schedules get confirmed)
- School Board Approval: June 18, 2018

REQUEST FOR PROPOSALS

BACKGROUND AND GENERAL INFORMATION

The Board of Directors for the Baxter Community School District has determined that the current space within the 1916 building and 1924 building addition are inadequate to offer the educational program of the district. To address these needs, the Board of Directors plans to prepare a bond referendum for community vote in December 2018 to fund the demolition of the existing 1916 building and 1924 addition and construction of a new addition to house administration offices; up to fifteen (15) new classrooms; common areas; storage spaces; and new MEP support facilities. Funding for the project will be sourced from General Obligation Bonds ranging from \$6,000,000 to \$7,000,000 and Sales Tax Revenue Bonds, if needed.

The Baxter Community School District is a Pre-Kindergarten through Grade 12 School District located in Baxter, Iowa. For the 2017-2018 school year, district certified enrollment was 423 students.

Anticipated gross area of the new addition is approximately 30,000 square feet. Desired completion of the project is May 2020. The district intends to move-in and begin use of the new areas in August 2020. The demolition of the existing structure and construction of new plant support facilities will precede the completion of the new building addition. Demolition and construction of the project is expected to take 15 months. The project is located on the north side of the building at 202 East State Street, Baxter, Iowa. Baxter CSD intends to design and build energy efficient and sustainable facilities although this project is not expected to pursue LEED certification.

This RFP defines the services sought from the selected Project Architect and generally outlines the Project requirements. Briefly stated, the District is seeking experienced architectural design services to provide planning, programming, design, construction contract administration, and closeout services on the Project that will enhance the operational objectives of the District.

This RFP is for architectural services only. Firms shall not include resumes or company information for any design consultants including those that may be internal or external to the architectural firm. It is the intent of the District to have the selected architect issue RFP's for design consultants post-award. The design consultant RFP and selection process will be completed in collaboration with the District and Story Construction. All design consultants shall be contracted directly with the selected architect.

FORM OF CONTRACT

The selected Project Architect(s) will be required to enter into a contract with the District for the performance of the services as outlined in this RFP. The District will negotiate terms and enter into agreement with the selected Architectural firm for Professional Services defined in Owner-modified AIA Document B132-2009 Standard Form of Agreement Between Owner and Architect, Construction Manager as Advisor Edition.

The District reserves the right to contract with any entity responding to this RFP. The District makes no representation that participation in the RFP process will lead to an award of contract or any consideration whatsoever. The District shall in no event be responsible for the cost of preparing any proposal in response to this RFP. The awarding of the contract(s), if at all, is at the sole discretion of the District.

RESTRICTIONS ON LOBBYING AND CONTACTS

From the period beginning on the date of the issuance of this RFP and ending on the date of the award of the contract, no person or entity submitting a response to this RFP, nor any officer, employee, representative, agent, or consultant representing such a person or entity, shall contact through any means or engage in any discussion regarding this RFP, the evaluation or selection process, or the award of the contract with any member of the Board of Directors, Superintendent, or Business Manager. Communications shall be directed to Brant Carr with Story Construction: brant.carr@storycon.com; (515) 817-2613.

SCOPE OF SERVICES

The selected Project Architect and its design consultants, which will be selected at a later date, shall provide programming, architectural planning, design services, construction contract administration services, and closeout services for the Project that meet the Project budget and schedule. The Architect shall lead the design process which includes the management & oversight of design consultants, developing a meeting schedule in conjunction with Baxter CSD & Story Construction, document decisions, and issue coordinated design documents. Hazardous material surveying, testing, documenting, preparing of abatement documents and abatement will not be a part of the Architect's scope.

The District has a diverse and complex school operation that encompasses a number of areas where the services are to be provided. In all phases of the services, the selected Project Architect and Design Consultants shall recognize that, to properly assist the District, the services must be provided in a manner that is transparent and reflects the involvement of the District, community, and all of its stakeholders.

Space and Functional Programming Phase

- Facilitate meetings as required to prepare a complete programming document, which illustrates the design intent for each room.
- Collect and Analyze data to complete a space program referencing the School Board Policies and Educational Philosophy established by the Board as well as meeting with District Facilities staff, neighborhood organizations and upper level District administrators as required for programming guidance.
- Develop Functional Program including refinement of space adjacencies and special equipment needs.

Architectural Design and Development of Construction Documents Phase

- Review and validate existing conditions at the proposed sites as well as as-built documentation of the relevant existing facilities and utilize these in the preparation of the design documents.
- Develop design documents in collaboration with Baxter CSD and Story Construction. The design process will include development of documents for Conceptual Design, Schematic Design, Design Development, and Construction Documents. Cost estimates will be completed by Story Construction and appropriate reviews and approvals will occur at the completion of each design phase.
- Prepare Construction Documents as required for a single bid with multiple phases for construction. This may be adjusted as the design progresses. Multiple trade contract packages will be bid. Bids are anticipated to be received the second week of February with contract award occurring the third week of February. The Design Phase is expected to continuously flow from award through the bond referendum for community vote to bid day.
- Basic design and engineering services shall include at minimum the following disciplines: Civil (including landscaping), Structural, Architectural, Mechanical-HVAC, Plumbing, Electrical, Telecommunications

(Voice, Video and Data), Fire Protection, Security, and all other upper division disciplines necessary to produce a complete and accurate set of design/construction documents. Cost estimates will be completed by Story Construction at each design phase: Conceptual Design, Schematic Design, Design Development, and Construction Documents

- The Architect shall lead a drawing page-turn review with key members of the District at the conclusion of the following design phases: Schematic Design, Design Development, and Construction Documents
- Coordinate efforts with environmental and other District hired consultants.
- Submit design documents to District, state and other governmental entities and/or utility providers as required for plan checks, permits, and approvals required by law and City Code, and make changes to such documents as necessary.
- Participate in estimating, scheduling, constructability review and planned maintenance meetings as needed.
- Organize and/or participate in two community and/or other meeting as needed or reasonably requested by the District.
- Develop documents related to building demolition, salvage, repurpose, and recycling.
- Presentations to the school board at major milestones including approval at the conclusion of each design phase.
- Utilize Building Information Modeling LOD 300 for design coordination and clash detection. The Architect will lead the BIM coordination. Include fees, including consultant fees, associated with turnover to Construction Manager for construction use.

Construction and Close-out Phase

- Work closely with Story Construction throughout construction. Provide construction contract administration services and closeout services, including, but not limited to, assistance in obtaining bids and awarding contracts for construction (such as bid review); review of product submittals; response to contractor requests for information; issuance of supplemental instructions; issuance of Owner-Initiated Change Order Requests; observe work in progress for conformance to construction contract documents and quality standards; issuance of periodic observations, evaluations and inspections; representation, counsel, and consultation with the District on construction contract matters; and assist with construction completion and acceptance activities.
- Review contractor submitted change orders in conjunction with Story Construction for District approval.
- Prepare record drawings from contractor as-built drawings. Provide CAD and pdf drawings of as-built drawings as part of closeout.
- Review contractor submitted closeout documents.
- Assist the District with the preparation of all required agency and governmental close out documentation.
- Obtain, prepare, coordinate and submit documents as required for governmental review and final certification of Project.
- Organize and/or participate in construction progress and/or other meetings as needed or reasonably requested by the District.

SUBMITTAL FORMAT

Firms responding to this RFP for the Project must follow the format below. Material must be in 8-1/2 x 11-inch format and should be no longer than 50 single sided pages. (Tabs and cover pages do not count against this total.) The information presented under each heading should conform to the information requested.

Submittals shall include divider tabs labeled with boldface headers below, e.g. the first tab would be entitled “**Business Information**”, the second tab “**Project Approach**”, etc.

COVER LETTER –shall have the name of the firm making the submission indicating your interest in working with the District. Include a brief description why your firm is well suited for and can meet the District’s needs. The letter shall be signed by the individual authorized to bind the respondent to all statements and representations made therein and the terms and conditions of this RFP, and to represent the authenticity of the information presented.

Tab 1 – BUSINESS INFORMATION – provide the following information:

- The firms name.
- The name and email of the main point of contact for the firm.
- The Federal Tax I.D. Number of the firm.
- The License or Registration Number for the point of contact.
- The firms business structure (Corporation, Partnership, etc.).
- A brief description and history of the firm.
- The firms number of employees (licensed professionals, technical support).
- The firms number of current projects, present workload, and anticipate workload for the period in question.
- The firm’s office location where the bulk of services solicited will be performed.

Tab 2 – PROJECT APPROACH

- Provide a statement demonstrating your firm’s or team’s ability to accomplish the scope of services in a comprehensive and thorough manner with an aggressive schedule in order to meet the District’s goal of moving the Project into construction within the earliest possible timeframe.
- A brief written summary of the firm’s philosophy related to the planning and design of the District’s Project.
- Describe in detail how your firm will provide the services requested by the District.
- Provide your firm’s approach and experience collaborating with a Construction Manger during design and construction.
- Describe your firm’s approach to quality control/assurance procedures including coordination of design disciplines.
- Describe your firm’s experience with construction cost reduction measures such as, but not limited to, value engineering during design and construction.
- Describe how your firm has incorporated the use of energy savings & sustainability in the design of similar facilities.
- Describe how your firm will include District community, staff, administration and the School Board in the design process.

Tab 3 – RELEVANT PROJECT EXPERIENCE – Provide information about prior services/designs prepared by your firm on at least three (3) prior relevant projects. Include the following information:

- Briefly state the significance of each relevant project your firm has worked on that you would like to be considered in this RFP.
- Specify role of firm or individual if work was not exclusively by the firm (i.e., joint venture, association).

- Provide a list of the following for each project:
 - Project name and location
 - Beginning and end dates of project (including construction)
 - Square footage
 - Main project/program elements
 - Original budget, bid amount & final amount at close-out
 - Owner's main point of contact with phone number
 - Key individuals of the firm involved and their roles in the project
 - Any sub-consultants that worked with the firm

Tab 4 – PROJECT TEAM SUMMARY

- Identify key team members expected to work on this project, along with their resumes and state their qualifications relevant to the requested services and the scope of this project. Identify other project commitments that are concurrent with this project and the percentage of time available for this project for each proposed team member.
- Provide a staffing organizational chart specific for this project indicating the Principal in charge and the Project Manager by name. Others in organizational chart should be identified to the greatest extent possible but there's understanding if the box is filled out with the role only at this time.
- If the proposing entity consists of a team of multiple firms, the proposal should include a description of how the team will be formatted and how the leadership will be structured.
- Provide a team organizational chart specific for this project that identifies the anticipated use of design consultants by discipline.
- Identify the team members office location and how your firm will service the District within a reasonable proximity of Baxter, IA.

Tab 5 – LITIGATION HISTORY – Provide a five-year summary (including pending matters) of the firm's litigation, mediation, and arbitration history with previous clients or with any matter involving the business activities of the firm.

Tab 6 – PROPOSED FEE AND SCHEDULE – Provide a proposed fee and total estimated hours for the performance of the services requested.

- The fee shall not include design consultants at this time. Provide a separate breakdown of anticipated fee range for each design consultant listed in the project organization overview.
- Design consultants will not be marked up as a reimbursable expense. Time to oversee & manage the design team shall be included in the base fee.
- Provide a breakout for demolition design services.
- The District is exempt from sales and use taxes on the services, and no such taxes should be included in any proposed pricing.
- Provide a list of reimbursables that are not included in the fee and an estimated cost range for each expense.
- Also provide a list of hourly rates for work that may exceed the scope of services described in this RFP, which the rates shall be valid for the duration of the services.
- Provide a schedule for the services based on the Project timeline prepared by the District.

Tab 7 – CERTIFICATIONS – Provide the following certifications:

- The selection of your firm will not result in any current or potential conflict of interest, including, but not limited to, any connection with the sale of any equipment or material such as might be used in connection with the Project, or any engagement or interest in a business which may cause a preference for specific products or services connected with the Project.
- The proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a proposal for the same services, and is in all respects fair and without collusion or fraud.
- The firm and its principal officials are not debarred, suspended, or otherwise excluded from, or ineligible from, participation in federal assistance programs or activities. The selection of your firm will comply with (or will not violate) Iowa Code Chapter 692A, as amended, regarding the presence of registered sex offenders on District property. The selected Project Architect may be required to provide further certifications and/or assurances to this effect.

Tab 8 – INSURANCE – State whether the firm has current general and professional liability insurance and, if so, for each policy provide the name of the insurance carrier and policy number, coverage types and amounts, and any exclusions.

SELECTION CRITERIA

The most highly qualified firms designated from the RFP process will be selected to participate in an interview process with the District. After the interviews, the District Selection Committee will identify the firm/team that it determines best fits the needs of the District.

Should the District be unsuccessful in contract negotiations with the firm(s) of choice, the firm(s) identified as second choice may be extended the opportunity to negotiate a contract(s).

Each Proposal will be evaluated and ranked on the criteria set forth below.

1. Business information and relevant experience of the firm
2. Project approach
3. Qualifications of proposed Project team and proximity to serve the District
4. References & litigation history
5. Proven success and experience with scope, scale, phasing, and complexity of similar projects
6. Project understanding
7. Proposed fee and schedule

It is the District's intent to review all proposals and select a Project Architect that it determines best fits the needs of the District, based on ability, experience, approach, quality, references, and other criteria outlined above, at a reasonable cost and schedule. Those items requested by the RFP which are not outlined above may be used as a basis for possible disqualification. It is the intent of the District that the selection criteria and ranking of respondents will serve only to assist the District in its selection of a Project Architect, and the District reserves the right to select a Project Architect(s) that it determines, in its sole discretion, to be in the best interests of the District.

The District reserves the right to conduct any investigation of the qualifications of any respondent that it deems appropriate, negotiate modifications to any of the items proposed in a proposal, or request additional information from any respondent. Failure by a respondent to timely provide any additional information

requested by the District may, in the sole discretion of the District, be cause for the rejection of the respondent's proposal.

SELECTION TIMELINE

The District expects to select firms for interview on or about, May 30, 2018, and expects to conduct interviews on June 7th-14th, as schedules get confirmed. It is the District's intent to make a decision on the proposals on, June 18, 2018. Proposals must be good for at least sixty (60) days after the deadline for submission of proposals.

SUBMISSION GUIDELINES

Each proposal must conform and be responsive to the requirements set forth in this RFP. The District reserves the right to waive any informalities or irregularities in received proposals. Further, the District reserves the right to reject any and/or all proposals or parts thereof and to negotiate contract terms with one or more respondent firms for the work, and to enter into such contract as shall be deemed to be in the best interests of the District.

The District hereby notifies all respondents that it will affirmatively ensure that, in any contract entered into pursuant to this advertisement, minority business enterprises will be afforded full opportunity to submit its response to this RFP and no respondent will be discriminated against on the grounds of any legally protected class on consideration for the award.

All proposals become the property of the District and will not be returned to the respondent. Once received and opened, the contents of the proposals will be placed in the public domain and be open for inspection by interested parties. Trade secrets or proprietary information that are recognized as such and are protected by law may be withheld upon the written request of the respondent.

The terms and conditions of this RFP and any resulting contracts or activities based upon this RFP shall be construed in accordance with the laws of the State of Iowa. All respondents shall comply with applicable federal, state, and local laws and regulations as well as all applicable District policies and rules at all times relevant hereto.