REQUEST FOR PROPOSALS (RFP)
UPPER MERION AREA SCHOOL DISTRICT
FACILITIES FEASIBILITY STUDY

The Upper Merion Area School District (District) invites professional architectural/engineering firms to submit proposals for a comprehensive District-Wide Facilities Feasibility Study (Study). The Study shall be in sufficient detail to provide information that will comply with the applicable Pennsylvania Department of Education standards for such studies.

A. BACKGROUND

The District plans to review its district-wide facilities and education requirements in order to prepare a district-wide facility study and prioritize options at the various facilities and develop a comprehensive facilities improvement plan.

B. PROPOSALS

Sealed envelopes clearly marked “FACILITIES STUDY” containing the proposal must be submitted no later than February 10, 2014, at 1 p.m. prevailing time. Interviews may be conducted by the District subsequent to the submissions. Additional information may also be requested.

Mail or deliver six (6) hard copies of the proposal, including one (1) electronic PDF copy, to:

Mr. Steve Skrocki, Business Administrator
Upper Merion Area School District
435 Crossfield Road
King of Prussia, PA 19406

All questions concerning this proposal or project should be submitted in writing to Steve Skrocki via e-mail at sskrocki@umasd.org prior to February 3, 2014. An addendum will be posted on the district website at http://www.umasd.org/domain/38 should one be required.

The scope of services desired is defined in this Request for Proposal (RFP). The District shall have the right to modify this scope, as it deems necessary. The terms of the Agreement between District and Professional Firm (Firm) shall be subject to review and modification by the District’s solicitor.

C. FEE PROPOSAL

Submit proposal as a lump sum fee for the services outlined in Section 1. Provide a fee for any additional recommended work.

D. TIMELINE, SELECTION AND INFORMATION TO BE PROVIDED

The tentative schedule for the selection process is:

- Issue RFP – January 15, 2014
- Advertisement dates - January 15, 22, 29, 2014
- Receive responses to RFP – February 10, 2014 at 1 p.m. prevailing time
- Presentation of proposals and interviews - date to be determined in February, 2014
- School Board approval of Firm - March 3, 2014
- Completion and submission of study – July 1, 2014
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The above dates are subject to change at the District’s discretion.

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 an agreement in writing is executed by both the Firm and the District. It is further understood that some of the items that will be considered in selecting a Firm include:

i. Competency and responsibility of firms submitting proposals
ii. Past experience and references of the firms
iii. Personnel assigned to project and their qualifications
iv. Fees

It is finally 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.

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

Tab 1. Organization, Staffing, and Qualifications

1. Provide a project team organization chart depicting team members (including consultants such as mechanical, electrical, plumbing, civil, structural, landscaping, food service, technology, acoustics, etc.), with names, titles, specific responsibilities, resumes, and qualifications of team members that will be directly involved in the project.

2. Provide the address of the specific office which will have responsibility for performing the work.

3. Provide a brief overview of your firm including the number of years your firm has been providing architectural/engineering services and experience with Facilities Feasibility studies, as well as other work performed.

4. Provide a list of school districts for which the firm has completed similar feasibility studies.

5. Provide a statement of experience regarding the Pennsylvania Department of Education’s PlanCon process.

6. Provide an estimate of the time that will be required to complete the Study. A timeline for completion of the various sections should be included.

7. Through narrative discussion, show reason why this firm believes it is especially qualified to undertake this project. Discuss any unique qualifications that this firm possesses which would benefit the District in the execution of this project.
Tab 2. Fee Proposal

1. The fee proposal shall include a lump sum for the services requested in Section 1. This lump sum shall include all compensation and other payments due to the Firm (e.g.: manpower, overhead, profit, direct costs, reimbursables for 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 of management, architectural, engineering and clerical support services that are included in the lump sum fee proposal.

3. Submittal of a proposal by your firm shall be representation that you understand the scope of the project.

4. The Firm shall furnish to the District proof of professional liability insurance in the amount of $3,000,000 per claim and $3,000,000 in the aggregate, with the District to be named certificate holder.

SECTION 1 - BASIC SERVICES

1.1 District intends to develop a facilities improvement plan.

1.2.1 FACILITIES IMPROVEMENT PLAN

The Facilities Improvement Study would include three basic programs of service; A) Condition Survey; B) Report Preparation and Cost Estimates; and C) Reconstruction and Repair Recommendations in a priority order established using a logic matrix, including upgrading of present facilities for conformance with current building codes and Pennsylvania State Board of Education guidelines.

A. Condition Survey: A complete physical survey of all district-owned buildings to ascertain existing conditions. Visit http://www.umasd.org/domain/25 for a listing of buildings. Additional structures to be included in the condition survey include the Boat House, Stadium and Concession Stand. Meetings will also be held with facility personnel and administration to review building concerns. The following will be included in the surveys:

1. Building Exterior
2. Building Interior
3. Site
4. Athletic Fields (see comment under district responsibility)
5. Electrical
6. HVAC
7. Plumbing
8. Documentation of code violations or recommendations for improvement
9. ADA recommendations for improvement
B. Report Preparation and Cost Estimates: The results of the surveys and interviews will be tabulated on master schedules which will identity and quantify all conditions on a graded basis. Cost estimates for Capital Improvement, reconstruction and upgrading of present facilities will be provided.

C. Reconstruction and Repair Recommendations: A priority schedule using the logic matrix will be used to assign priorities to the recommendations.

D. Provide assessment of municipal approval requirements and associated costs for any of the recommendations.

E. Provide assessment of energy savings opportunities and LEED requirements for any of the recommendations.

After completion of the above phases, all of the data will be combined into a report for each of the facilities. The final compilation will then be placed into a comprehensive Capital Improvement Plan with the focus on developing the district-wide improvement plan. The Firm shall present the final report to the District Board of School Directors.

1.2.2 Assist the District with developing a district-wide facility study for compliance with PDE requirements. The following information (as required for PlanCon Part A) will need to be included in the facility study:

   a. An analysis of each building’s capacity as it relates to the educational program – prepared by Firm and reviewed by District.
   b. An analysis of each building’s physical condition – prepared by Firm and reviewed by District.
   c. Estimated costs to upgrade each building to current standards – prepared by Firm and reviewed by District.
   d. An overview of the District that considers such factors as geography and population – to be provided by District and integrated by Firm.
   e. District-wide projected enrollment – to be provided by District. An enrollment study was recently completed and can be viewed at http://is.gd/smitxv.
   f. An overview of the District including such factors as any distinguishing characteristics that will have an impact on facilities such as geographically separate population centers - to be provided by District and integrated by Firm.
   g. An overview of the District’s educational program that highlights any special facility needs. The educational program review will also include consideration of technology advancements, classroom requirements, functionality of larger learning spaces, and educational spaces needed to support 21st Century Learning Skills – to be jointly developed by District and Firm.
   h. An analysis of construction options including the alternatives to consider and the pro’s and con’s of each alternative. This analysis should include phasing costs, energy...
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savings opportunities and Platinum LEED certification where applicable – prepared by Firm and reviewed by District.

i. Cost estimate of each option – prepared by Firm and reviewed by District.

j. A summary depicting buildings, options, and costs – prepared by Firm and reviewed by District. The firm shall provide the rationale for each option.

1.2.3 Cost analysis: A preliminary budget will be developed using square foot building costs and additional necessary project costs for site work, phasing, equipment, fees, contingency, etc.

1.2.4 Site selection: Assist the District with respect to site selection; the site shall be appropriate and consistent with the educational program, building design, building construction and budget for the Project.

1.2.5 Conceptual planning: Preliminary conceptual planning, including phasing requirements, site utilization, utility issues, etc. Type, size, and location of the facility can be developed during this phase.

1.2.6 Perform preliminary investigation of local and state, and federal agency requirements that may apply, i.e. zoning requirements, Planning Commission, DEP, etc., for establishing schedules and submittal requirements.

1.2.7 Also in conforming to Department of Education guidelines, additional requirements are now required and must be included in your study of all buildings. These changes are summarized below:

(a) Geothermal well fields, photovoltaic energy generation systems (ground or roof mounted), wind energy generation systems (ground or roof mounted) and green roofs are to be considered site development.

(b) The district-wide facility study must include: (i) for each exiting building, facility benchmarking analysis using the EPA/DOE Portfolio Manager tool and comprehensive (8,760 hour energy modeling, identifying the annual site and source energy and annual water consumption. (ii) for each new building, a predictive utility budget using the EPA/DOE Target Finder tool and comprehensive (8,760 hour) energy modeling, identifying the annual site and source energy and annual water consumption. The District uses its own detailed spreadsheet tool to monitor energy consumption and thus has not maintained the EPA/DOE Portfolio Manager tool since about 2008 when all of its school buildings last earned Energy Star certification. Thus, the Firm will need to update the Portfolio Manager tool using billing information which will be provided by the District.
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SECTION 2 - ADDITIONAL SERVICES

2.1 Services Requiring Authorization in Advance.

Additional Services as agreed to by District and Firm. No additional services shall be provided without prior written authorization by Superintendent or Business Administrator.

SECTION 3 - DISTRICT'S RESPONSIBILITIES

District shall do the following in a timely manner so as not to delay the services of Firm.

3.1 Designate in writing a person to act as District’s representative with respect to the services to be rendered under this Agreement. Such person shall have complete authority to transmit instructions, receive information, interpret and define District’s policies and decisions with respect to Firm's services for the Study.

3.2 Provide all criteria and full information as to District's requirements for the Project, including design objectives and constraints, space, capacity and performance requirements, flexibility and expandability, and any budgetary limitations; and furnish copies of all design and construction standards which District will require to be included in the Study.

3.3 Assist Firm by placing at Firm’s disposal all available information pertinent to the Project, including previous reports and any other data relative to design or construction of the Study.

3.4 Examine all studies, reports, sketches, drawings, specifications, proposals, and other documents presented by Firm, obtain advice of an attorney and other consultants as District deems appropriate for such examination and render in writing decisions pertaining thereto within a reasonable time so as not to delay the services of Firm.

3.5 Give prompt written notice to Firm whenever District observes or otherwise becomes aware of any development that affects the scope or timing of Firm’s services, or any defect or non-conformance in the work of any Contractor.

3.6 Bear all costs incident to compliance with the requirements of this Section 3.

3.7 General floor plans for the buildings are included as part the RFP (see separate PDF).

3.8 The District does not have CAD drawings of the existing buildings. However, the District will allow the firm to borrow its existing blueprints for the purpose of making copies necessary to produce the requested report. The Firm shall promptly return the blueprints upon completion of the reproduction of the CAD drawings.

3.9 The District has a 2010 Athletic Campus Master Plan report that is included as part of the RFP (see separate PDF).
SECTION 4 - PAYMENTS TO FIRM

4.1 Times of Payments. Firm selected will be paid 50% of agreed upon written contract upon submission of invoice at upon completion of 50% of the work. The remaining 50% will be paid upon receipt of a document conforming with the services section including meeting the criteria acceptable to PDE in conformance with PlanCon Part A.

SECTION 5 - GENERAL CONSIDERATIONS

5.1 Controlling Law. This agreement is to be governed by the laws of the Commonwealth of Pennsylvania.

5.2 Neither District nor Firm shall assign, sublet, or transfer any rights under or interest in (excluding moneys that may become due or moneys that are due) this Agreement without the written consent of the other, except to the extent that any assignment, subletting or transfer is mandated by law or the effect of this limitation may be restricted by law. Unless specifically stated to the contrary in any written consent to an assignment, no assignment will release or discharge the assignor from any duty or responsibility under this Agreement. Nothing contained in this paragraph shall prevent Firm from employing such independent professional associates and consultants as Firm may deem appropriate to assist in the performance of services hereunder.

5.3 Nothing under this Agreement shall be construed to give any rights or benefits in this Agreement to anyone other than District and Firm, and all duties and responsibilities undertaken pursuant to this Agreement will be for the sole and exclusive benefit of District and Firm and not for the benefit of any other party.

SECTION 6 - INSURANCE

6.1 Firm shall procure and maintain insurance for protection from claims under Worker's Compensation Acts, claims for damages because of bodily injury, including personal injury, sickness or disease or death of any and all employees or of any person other than such employees in an amount of at least ONE MILLION DOLLARS ($1,000,000.00). Such insurance shall be maintained with reputable insurance companies, and Firm shall provide District with a Certificate of Insurance upon District’s request.

6.2 Firm shall also procure and maintain professional liability insurance for protection from claims arising out of performance of professional services caused by negligent error, omission or act for which the insured is legally liable; such professional liability insurance will provide for coverage in such amounts, with such deductible provisions and for such period of time as set forth below, and certificates indicating that such insurances in effect will be delivered to District upon District’s request:

   AMOUNT: $3,000,000.00     DEDUCTIBLE: $50,000.00
SECTION 7 - MISCELLANEOUS

This Agreement together with the exhibits and schedules identified herein constitute the entire agreement between District and Firm and supersede all prior written or oral understandings. This Agreement and said exhibits and schedules may only be amended, supplemented, modified, or canceled by a duly executed written instrument.

IN WITNESS WHEREOF, the parties hereto have made and executed this Agreement as of

__________________________
Date

DISTRICT: UPPER MERION AREA SCHOOL DISTRICT

By: ____________________________________________
Printed Name: ____________________________________
Title: ___________________________________________
Date: ___________________________________________

PROFESSIONAL FIRM:

By: ____________________________________________
Printed Name: ____________________________________
Title: ___________________________________________
Date: ___________________________________________