

# **Junction City School District #69**

## **REQUEST FOR PROPOSALS for VISIONING and FACILITATION SERVICES**

### **PART I**

#### **INTRODUCTION**

##### **Announcement:**

Written proposals will be accepted until 5:00 PM, Wednesday, June 4, 2008, in the District Office, Junction City School District, 325 Maple St. Junction City, Oregon 97448. All proposals shall be identified as **Request for Proposal – Visioning and Facilitation Services** on the outside of an opaque envelope. Please submit five (5) copies of the proposal.

Requests for specific requirements and any questions should be directed to Christopher Meyer, Maintenance Director, 325 Maple St., Junction City, Oregon 97448, phone 541-998-6311, ext. 603, e-mail [jcsd-rfp@lane.k12.or.us](mailto:jcsd-rfp@lane.k12.or.us).

**End of Part I**

## **PART II**

### **INSTRUCTIONS**

#### **SCHEDULE OF EVENTS**

May 7, 2008	Advertise in the Tri-County News, Daily Journal of Commerce, Eugene Register Guard and The Oregonian.
May 23, 2008	All protests of specifications must be mailed to Junction City School District #69.
June 4, 2008	Responses to Request for Proposals are due to Junction City School District #69 no later than 5:00 PM.
June 12, 2008	Respondents will be contacted to schedule interviews.
June 18 & 19, 2008	Date reserved for interviewing short-listed firms.
July 1, 2008	Award contract.

#### **RESPONSIBLE RESPONDENT QUALIFICATION**

Those who are in doubt as to their qualifications are encouraged to contact Christopher Meyer, Maintenance Director, to determine if they qualify. Formal pre-qualification is neither required nor desired.

#### **RESPONDENT'S REPRESENTATION**

By making his proposal, each respondent represents that he has read and understands the Request for Proposal (RFP) documents.

#### **INTERPRETATION OF PROPOSAL DOCUMENTS**

In contemplating the submission of a proposal for this project, any person who finds discrepancies in or omissions from the proposal documents, or is in doubt as to the true meaning of any part of the proposal documents, is asked to request an interpretation thereof, at least seven days prior to the date on which the proposals are to be opened. The District will issue any interpretation or correction as an Addendum. Only a written interpretation or correction by Addendum shall be binding.

### **PROTEST OF SPECIFICATIONS**

Any protest of a specification herein contained must be in writing and include the following: 1) A detailed statement of the reason(s) for the protest, including all legal and factual grounds; 2) A description of the resulting prejudice to the Proposer; and 3) A statement of the form of relief requested or any proposed changes to the RFP provisions, specifications or contract terms. All protests must be received at the Junction City School District Office through Friday, May 23, 2008. All protests received prior to said time will be reviewed and acknowledged.

If the Evaluation Committee deems the protest to have merit, the District may issue an Addendum to those of record holding RFP's, announcing a change in the RFP or a delay in the opening.

If the Committee determines the protest does not require changing of said specifications or delaying the opening of proposals, the individual or company lodging the protest will be notified of this fact and will be informed of the date and time the Recommendation of Award will be presented to the School Board. The protester may attend the Board meeting at which the contract is scheduled to be awarded and may submit the protest to the Board for consideration. In the event the proposal is not required to be submitted to the School Board for award, the protester will be given the opportunity to appear before the Evaluation Committee prior to the award.

### **FORMAT OF PROPOSAL**

**IMPORTANT NOTICE:** Oregon State statutes and administrative rules require that Junction City School District #69 (the "District") employs a prescribed bid/quote/ proposal process. The District takes the bid/quote/proposal process seriously, and it is the intent of the District to solicit proposals that are accurate and that each respondent intends to honor. Respondents are expected to submit proposals that are accurate, complete, and contain all terms and conditions that the respondent feels are necessary. If, after submitting a proposal, the respondent finds changes are necessary, the respondent may change or withdraw the proposal ANY TIME PRIOR TO the time of the proposal opening. However, after the opening, the proposal MAY NOT be changed or altered in any way. If accepted, a proposal is considered a binding contract, non-cancelable, and that the respondent will be expected to honor. If for any reason the respondent does not perform, the District may take whatever action it believes appropriate including, but not limited to, the removal of that respondent's name from future bid lists.

Oregon's administrative rules allow use of a Request for Proposals for certain goods or services, including those requested in this instance. This Request for Proposals allows respondents the opportunity to submit to the District the proposal or proposals that the respondent believes will best meet the stated requirements of the District.

Respondents shall provide five (5) copies of their proposal and all attachments. One copy must be designated "original" and must contain all required original signatures (Proposal Form). Respondents are limited to 15 pages, single-sided, 8 ½" x 11", minimum 11-point font. Any

additional information deemed appropriate should be included and submitted as a separate document. The cover letter and resumes are to be included as part of the 15-page maximum response.

All proposals shall be sealed in a single opaque envelope or package and addressed as follows:

Junction City School District #69  
Attention: Christopher Meyer, Maintenance Director  
325 Maple St.  
Junction City, Oregon 97448  
[jcsd-rfp@lane.k12.or.us](mailto:jcsd-rfp@lane.k12.or.us)

In addition, the name and address of the respondent and the title of the proposal IDENTICAL in wording to that appearing on the cover of these specifications MUST appear on the outside of said envelope. (Request for Proposals - Visioning and Facilitation Services).

All proposals must be received in the District Office no later than the date and time specified in the Request for Proposal. The District WILL NOT accept proposals delivered to any location other than the District Office.

The respondent shall sign Proposal Form (Part V) of this Request for Proposals with ink or indelible pencil, as follows:

- In the case of an individual respondent, by such individual respondent.
- In the case of a partnership, the name of the partnership must be listed and the proposal shall be signed in the name of the partnership by at least one general partner. In addition, the names of all general and limited partners shall be listed.
- In the case of a corporation, the corporate name shall be subscribed by the president or other managing officer and, under the signature of such officer, the name of the office such individual holds or the capacity in which he or she acts for the corporation.

Facsimile or electronic transmissions will not be accepted.

#### **PROPOSAL IRREGULARITY GUIDELINES**

- Substantial Proposal Irregularities Requiring Rejection of Proposal:
- Proposal not submitted on specified form or altered in form by a respondent.
- Unsigned proposal.

- Post-proposal refusal to submit to specified proposal requirements such as Wages, Non-Collusion, or Subcontractor Listing.
- Altering a proposal as to specified time of commencement or completion of work.
- Proposal not received prior to specified deadline.

### **PROHIBITIONS OF ALTERATIONS (PROPOSAL)**

Except as otherwise provided herein, proposals that are incomplete or are conditioned in any way, contain erasures, alterations, or items not called for in the proposal, or are not in conformity with the law, may be rejected by the District as informal. Only the amounts and information asked for in the Proposal Form will be considered as the Proposal. Each respondent shall respond upon the work exactly as specified and as provided in the Proposal Form.

### **FORM OF AGREEMENT**

Within FIVE (5) CONSECUTIVE CALENDAR DAYS after receipt of "Notice of Proposal Award," the District and the respondent(s) to whom the contract is awarded shall execute a formal, written contract. The formation of such a contract shall not be complete, and the District shall not be liable thereon, until the formal written contract is executed.

### **EQUAL EMPLOYMENT COMPLIANCE REQUIREMENT**

By submitting this proposal, the respondent certifies conformance to applicable federal acts, regulations, executive orders, and Oregon statutes and administrative rules concerning affirmative action toward equal employment opportunities. All information, records, and reports that the respondent is required to maintain for this purpose by federal or state agencies having responsibility for the enforcement of such laws shall be supplied to the District upon request.

### **EVALUATION**

The Evaluation Committee shall evaluate all proposals and shall rank them according to qualifications that will include, but need not be limited to, the mandatory requirements listed in this section. Proposals submitted that do not meet mandatory requirements will not be considered.

The Evaluation Committee shall review all documents submitted and may confer with selected clients of the respondent. The Committee may also meet with selected respondents to review their proposals.

All proposals from qualified proposers that meet all the minimum required qualifications and are in conformance with these specifications will be evaluated and ranked. For this purpose, the Evaluation Committee will employ the following criteria:

<b>Criteria</b>	<b>Points</b>
<b>Capability to perform the consultant services for the project being considered</b>	<b>20</b>
<b>Project approach, staffing level, and philosophy of Service</b>	<b>25</b>
<b>Performance history on past projects for school districts</b>	<b>20</b>
<b>Reference of other clients</b>	<b>15</b>
<b>Pacific Northwest Regional Location</b>	<b>5</b>
<b>Compensation</b>	<b>15</b>
<b>Total Points</b>	<b>100</b>

The District, through the Evaluation Committee, reserves the right to invite one or more providers to present their proposals in person to an Interview Committee, in those cases where it is felt that a clearer understanding of the proposal is in order. The Interview Committee shall consist of some members of the Evaluation Committee plus others as assigned.

#### **DURATION OF PROPOSALS**

In the event that a respondent to whom a contract is awarded refuses or is unable to enter into or to perform the contract, the District reserves the right to withdraw the award and to re-award the contract to the respondent submitting the next highest qualified proposal. For this reason, the award of a contract to any respondent shall not constitute a rejection of any other proposal, and no respondent may withdraw his proposal after the hour set for the opening thereof or before award of the contract, unless award of the contract is delayed for a period exceeding FORTY-FIVE (45) DAYS.

#### **DISCLOSURE**

Proposals will not be made a part of the public record until AFTER the evaluation process is completed. All proposals and the evaluation report will then be available for public review.

#### **DISTRICT EMPLOYEES NOT TO BENEFIT**

No officer of the District or any person employed in its service is, or shall be, permitted any share or part of this contract or any benefit that may arise from such contract.

#### **TRANSFER OR ASSIGNMENT**

Neither this contract nor any interest therein shall be transferred to any other party or parties, and in case of such transfer, the District reserves the right to refuse to carry out this contract, either with the transferor or the transferee.

## **RESERVATION OF RIGHTS**

The District reserves all rights of action for any breach of contract by a successful respondent.

## **RESERVATIONS**

In addition to all other rights granted to it under Oregon law, The Board of Directors of Junction City School District #69 expressly reserves the following rights:

- To negotiate separately with any source whatsoever, in any manner necessary to serve the best interest of the District. *The District does not intend to award a contract solely on the basis of any response made to this Request for Proposals or in any way to pay for information solicited or obtained.* The information obtained will be used to identify the respondent who will best serve the interests of the District.
- To reject any or all proposals as permitted by Oregon statutes or administrative rules and to waive informalities in proposals.
- To consider the competency and responsibility of respondents and their proposed subcontractors in making the award.
- In the event any respondent(s) to whom the contract is awarded shall default in executing a formal contract or in furnishing satisfactory insurance coverage within the time and in the manner hereinafter specified, to re-award the contract to another respondent(s).
- In the event only one proposal is received, the Maintenance Director, at his election, return the proposal unopened.
- To make the award based on its best judgment as to which proposal best meets the District's expectations of a program balancing the highest standards of quality and service with the lowest cost.
- To make such changes or corrections in plans, specifications, or quantities as it may deem necessary or desirable prior to the proposal opening. Respondents will be notified of such changes in writing by addenda mailed to the address on file in the District Office.
- To cancel the contract upon written notice at any time, if the District, in its sole judgment, determines that the provider is not meeting the needs of the District.

### **TERMS AND CONDITIONS**

The District reserves the right to reject any irregularities or informalities in any proposal or to accept or reject any or all proposals if it is in the best interest of the public to do so. The District will not be responsible for any costs incurred by respondents while submitting proposals. All respondents to this solicitation do so solely at their own expense.

### **LEGAL FEES**

If suit or action is instituted in connection with any controversy arising out of this Proposal or the contract relating thereto, the prevailing party shall be entitled to recover, in addition to costs, such sum as the Court may adjudge reasonable as attorney's fees, including such attorney's fees on appeal to the Court of Appeals and/or Supreme Court.

### **QUESTIONS**

Questions regarding these specifications should be directed to Christopher Meyer, Maintenance Director at 541-998-6311, ext. 603, e-mail [jcsd-rfp@lane.k12.or.us](mailto:jcsd-rfp@lane.k12.or.us).

**End of Part II**



**Part III**  
**REQUEST FOR PROPOSAL**  
**FOR**  
**VISIONING AND FACILITATION SERVICES**

**REQUIRED SERVICES**

The Junction City School District #69 is seeking Visioning and Facilitation Services to assist the District in visioning and creating a program for the future of the facilities.

**PROPOSAL**

To provide the District with the information necessary to select the most qualified Facilitator (company or individual), the request for proposals (RFP) is being solicited from those interested in providing Visioning and Facilitation Services. The RFP format outlines the information that the respondent must submit in order to be considered for selection. Specific information regarding document submittal procedures and due dates will be found in the section 'Instructions to Respondents'. Respondents are limited to 15 pages, single-sided, 8 ½" x 11", minimum 11-point font for responses.

**BACKGROUND**

Junction City School District 69 has completed an evaluation of the condition of their current facilities. The results of that evaluation have identified repairs, alterations and additions valued at approximately 30 million dollars. Much of this work is considered vital to the long term viability of the buildings and the educational programs and services to the community. A lesser portion of this work is considered important to the usefulness of the facilities both in the short and long term. The District is seeking the services of a consultant to assist them with their decision making and visioning process of prioritizing the work recommended within the report, looking to the future as to the long term needs and desires of the Junction City education community, and to assess the desires and willingness to support these issues among the tax payers of the community in the form of a general obligation bond issue.

The District sincerely wants to know the opinions and desires of the patrons of the District and voting community. The scope of work that could be proposed in a bond issue may range from accomplishing part or all of the items identified in the Facilities Assessment document, to major renovations at the schools, to construction of replacement facilities.

The District is looking for a firm that will be able to formulate a visioning process to extract from District personnel and the patrons of the District their needs and desires and to facilitate that process.

The District has retained the services of gLAs Architects, LLC, as their professional bond adviser and architectural consultant, herein after referred to as “the architect.” The duties of the architect will be to advise the owner on issues relating to this consultant procurement, planning and process procedure. Additionally, the architect will be responsible for diagrammatic architectural design and construction cost estimating in support of the visioning process. Should the visioning process deem more in-depth architectural design would aid the process, the services of a “project architect” would be procured by a separate Request for Proposal procedure.

### **ENROLLMENT AND CURRENT FACILITIES**

Junction City School District currently has a student population of approximately 1,700. There are four schools composed of two elementary schools, Territorial and Laurel, one middle school, Oaklea, and one high school, Junction City High School. The enrollments are as follows: Territorial - 121; Laurel - 521; Oaklea - 482 and Junction City High School - 572.

The buildings are of varying ages. The original East wing of Junction City High School was built in the 1940's, the main building was built in 1958, with additions and upgrades in the 1990's. Oaklea Middle School was built in 1973. Laurel Elementary School was built in the 1950's with a classroom addition constructed in 1996. Territorial Elementary School was originally built in 1963 with a major addition constructed in 1996.

The District currently has no bonded debt.

### **FACILITIES ASSESSMENT STUDY**

gLAs Architects, LLC, and its consultants studied the four schools within Junction City School District for the purpose of assessing their condition. This was accomplished by studying the available construction documents and through on-site inspections. The study also identified specific instances where buildings fail to meet 2007 Oregon Structural Specialty Code standards for fire and life safety, primarily related to egress components. Additionally, the study addressed accessibility issues, specifically to determine compliance with the current Americans with Disabilities Act Accessibility Guidelines (ADAAG).

The resulting Facilities Assessment Document is available for the proposer's review, but is not made a part of this RFP. The document represents a factual representation of the condition of the District's facilities and the costs in 2007 dollars for any repairs and modifications needed to return the facilities to a reasonable and manageable maintenance cycle.

The study does not address, with a few exceptions, the District's potential desires as they might relate to program changes and the evolution of education and how the District views the future. It is this component that will be, at least in part, addressed by the efforts solicited by this RFP.

## **DESCRIPTION OF SERVICES NEEDED**

### **VISIONING PROCESS**

The District wishes to have the consultant establish, with the participation of the District Steering Committee, the visioning process by which the District will gain the input of administrators, staff, and citizens to formulate an approach to solving the District's facility issues both short and long term. This process could include large workshops, town meetings, written questionnaires, telephone surveys, or other such methodologies that the consultant deems appropriate. The consultant will draft all documents and, with the participation of the Steering Committee, prepare all questions placed before the participants.

The architect will act in support of this process. Ideas that have construction consequences and their resulting costs will be studied by the architect. These services are not a part of this RFP.

### **INFORMATION GATHERING**

The consultant will be responsible for organizing and facilitating the events resulting from the established process. The District is capable of providing space for meetings, copying, bulk mailings, and providing telephone staffing for surveys. This consultant would be responsible for training individuals that would participate in public contact activities.

### **PROCESSING GATHERED INFORMATION**

The consultant will be responsible for interpreting and cataloging the information gathered so as to provide the steering committee clear and useful direction. The consultant will be responsible for all communications among the participants and the community.

## **REQUIRED PROPOSAL INFORMATION**

The proposal shall be organized as follows:

- A. Cover Letter. Summarize in a brief and concise manner your understanding of the scope of the work being solicited by this RFP. The letter must name all individuals authorized to make representation for the Proposer.
- B. Section One. Capability of the Proposer to perform the Visioning and Facilitation Services required under this solicitation. (20 Points)
  - 1. Describe your firm, including your common services area, and general experience.
- C. Section Two. Approach to a Visioning and Facilitation process. (30 Points)
  - 1. Describe your philosophy of service.
  - 2. Identify personnel who will have primary responsibility for this work. Include experience and resume's for these individuals.
  - 3. Describe any innovative methods or procedures that may be of interest or benefit the District.
- D. Section Three. Performance history on past school district Visioning and Facilitation activities. (20 Points)
  - 1. Describe your relevant experience as Visioning Facilitator on K-12 programs over the last five years.
  - 2. Give examples of successful Visioning and Facilitation work.
- E. Section Four. References of other school districts served. (15 Points)
  - 1. Provide a reference contact person and phone number for all of the individual programs listed in section D above.
- F. Section Five. Business location (5 Points)

State the primary location of your business. Points will be awarded on the basis of proximity to the Willamette Valley, Oregon.
- G. Section Five. Compensation and quality of written proposal. (15 Points)
  - 1. Describe how you would propose to charge for your services.
  - 2. Give a minimum of five examples of fees charged for similar type of services as they might relate to the size of successful bond campaigns.
- H. Section Six. Bond campaign experience.

This section is non-scored for the purposes of this RFP. The information presented under this section will be used to evaluate the desirability of extending the scope of services contracted as a result of this RFP to include services related to a bond

campaign, or to pursue an RFP process for a campaign consultant should a bond issue be deemed viable.

1. Describe your experience in assisting school districts in the state of Oregon with the passage of general obligation bond issues.
2. List the bond campaigns you have been involved with and whether or not the campaigns were successful.
3. How do you commonly charge for your services related to bond campaigns?

#### **DISTRICT INFORMATION**

1. **Contact Person:**  
All questions regarding this Request for Proposal should be directed to Christopher Meyer, Maintenance Director. He may be reached at (541) 998-6311, ext. 603, email [jcsd-rfp@lane.k12.or.us](mailto:jcsd-rfp@lane.k12.or.us).
2. **Addenda:**  
All questions and clarification requests will be responded to and any changes to the documents will be done by written addendum. Addenda will be mailed, First Class, to all known Request for Proposal holders of record in the District office.
3. **Pre-proposal Meeting:**  
No pre-proposal meeting will be held by the District relating to this Request for Proposal.

**End of Part III**