

SBA 172

**DESIGN BUILD
EDUCATIONAL FACILITIES PLANNER**

**REQUIREMENT FOR THE
SUBMISSION AND EVALUATION
OF
EDUCATIONAL FACILITIES PLANNING SERVICES
TO THE**

_____ **COUNTY BOARD OF EDUCATION**

INVITATION FOR QUALIFICATIONS

**Educational Facilities Planner
For**

_____ **(Project)**

_____ **(Date)**

TABLE OF CONTENTS

Section	Title
1	Invitation for Qualifications
2	Project Description
3	Instructions to Submitting Individuals/Firms
4	Qualification Process
5	Selection Process

SECTION 1 – INVITATION FOR QUALIFICATIONS (IFQ)

Pursuant to Section 5G,1-4 of West Virginia Code, the _____ County Board of Education intends to contract with a Recognized Educational Facilities Professional (REFP) to provide professional services for:

Selection of the REFP shall conform to West Virginia Code 5G, 1-4 regarding the selection and fee negotiation process.

The successful REFP will be expected to enter into a single point of responsibility agreement with _____ County Board of Education to provide professional school planning services for the preparation of educational specifications for the referenced project.

Individuals/firms interested in providing educational planning services to _____ County are hereby notified that a Proposal for providing the requested services in response to this IFQ will be accepted until _____ p.m. (day and date). (Proposals received after this deadline will be disqualified). Proposals may be mailed or hand delivered to the following location:

_____ County Board of Education

The proposal is limited to 20 pages (excluding the required SBA forms) and shall be presented in a binder format, tabbed according to the Evaluation Criteria. Proposals shall be clearly identified in a sealed package and include all technical submission requirements. Proposals will not be opened until the expiration time established for submitted proposals has expired. One (1) original and ten (10) copies of the proposals shall be submitted and must be clearly labeled with the project name and the name of the submitting individual/firm affixed.

The format of the proposal shall be in strict conformance with the stipulated criteria in the Instructions to Submitting Individual/Firms (Section 3).

SECTION 2 – PROJECT DESCRIPTION

A. Scope of Work

In general, the work consists of the following: (insert project description)

B. Owners Anticipated Advertisement and Award

Advertisement/IFQ	_____
Proposals Due	_____
Notification of Short List Individual/Firms	_____
Presentations by Short listed Individual/Firms	_____
Recommendation of Selected Individual/Firms	_____
Deadline for Contract Negotiations	_____
Board Approval of Selected Individual/Firms	_____
Executed Contract and Notice to Proceed	_____

SECTION 3 – INSTRUCTIONS TO SUBMITTING INDIVIDUALS/FIRMS

A. General

The selection process for the REFP will be conducted as follows:

- Stage 1: The proposals received in response to this IFQ will be evaluated and ranked by a Selection Team in accordance with the process and evaluation criteria contained in Section 4. The proposal must be written and submitted with tabbed sections in the order of the evaluation criteria. The Selection Team will select (short list) no fewer than three (3)

individuals/firms to give a presentation at a later date to the Selection Team.

Stage 2: The short listed individuals/firms will meet with the Selection Team and the team will evaluate and rank each individual/firm based on the proposal information and the presentations in accordance with the process and evaluation criteria contained in Section 5.

Stage 3: The Selection Team will select the individual/firm they feel is most qualified to perform the services and will negotiate the fee for the completion of the educational specification for the project.

B. Questions

Questions regarding the completion and submission of the Proposal should be directed to _____ County will respond to all questions received regarding the general requirements of the educational planning process to be used for the project prior to the presentation date.

C. Expenses Incurred in Preparing Responses

_____ County accepts no responsibility for any expenses incurred by those individuals/firms offering their services to the county in the preparation of a response to this IFQ. All expenses incurred in the preparation of the response to the IFQ and the cost for the interview process shall be borne by the offering individual/firm exclusively.

D. Educational Facility Professional Qualifications

Individuals/Firms submitting a response to this IFQ must possess the Recognized Educational Facilities Professional certification provided by the Council of Educational Facilities Planners International. A copy of the certification must be provided in the response to the IFQ.

SECTION 4 – QUALIFICATION PROCESS

Selection Team

The Proposals received in response to this IFQ will be initially evaluated based on the qualifications of the individual/firm and the Selection Team will select (short list) individuals/firms that will be requested to give a presentation at a later date to the Selection Team. The information provided in the Proposal along with the oral presentation will provide the Selection Team a basis for determining the most qualified individual/firm. The members of the Selection Team are:

Name

Affiliation and Title

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Evaluation Criteria

The following Criteria are intended to provide the Selection Team with information regarding the qualifications of each educational planner. Proposals shall address each of the Criteria in the same order listed below.

A. Proposal Letter

Educational planners must provide an original letter stating their intent to provide planning services and identifying their willingness to proceed should they be selected to perform the planning services. The letter must be signed by an officer of the proposing firm or the prime team member.

B. Project Understanding

Planners must clearly demonstrate their understanding of the scope of the project and present a concise outline of specific services they are prepared to provide for the project. The proposal must also identify and discuss any of the services, or method of approach to the services, which are believed to be either “unique” or “outstanding,” or which may be recognized as giving a competitive edge or advantage.

C. Educational Planner and Personnel Resumes

Provide information describing the educational planner’s experience and qualifications. Indicate key personnel and their relationship to this project. Provide resumes of key personnel, their disciplines, respective roles, education, certifications, licenses and their experience in educational facilities planning.

D. Educational Planners Experience and Knowledge

Submit the educational planner’s experience regarding educational specifications and knowledge of the SBA requirements and West Virginia State Board of Education Policy 6200 Guidelines. Identify the lead personnel anticipated on this project and their respective responsibilities proposed for this project. Comment on the commitment to involve the lead personnel assigned to the project through all phases of the project.

E. Project Approach

Comment on your approach toward the formulation of the educational specification. Describe the process and communication procedures that will be employed throughout the development of the educational specification. Describe procedures, frequency and methods for obtaining educational input from _____ County and a plan to establish and maintain clear lines of communication with the _____ County and the school staff.

F. References

Please provide three (3) letters of references from individuals who have worked with you professionally or can provide professional character references.

G. Completion Schedule

Describe the general schedule and timeline anticipated for the completion of the educational specification.

SECTION 5 – SELECTION PROCESS

Proposal Evaluation

Based on the proposals received and the oral presentations, the Selection Team will use the process described in West Virginia Code 5G-1-4 to evaluate and select the educational facilities planner. The short listed individuals/firms will be notified on the date shown in Section 2 of this IFQ and will be given the opportunity to interview with the selection committee and present project information. The Selection Committee will evaluate and rate each individual/firm and based on the final team score begin negotiations with the highest rated individual/firm.

Oral Presentations

The short listed Educational Planner will make oral presentations to the Selection Team to review their proposal. The oral presentation will be limited to ___ minutes. The format of the presentation should be structured to clearly address the Evaluation Criteria contained in Section 4 of the IFQ. Presentation boards and handouts are acceptable. A projection screen will be made available for use if prior notice is given to the Selection Team. The Selection Team will have ___ minutes for questions.

Final Selection

The Selection Team will evaluate and rate the proposals and oral presentations on the Selection Team Rating Sheet contained in these instructions. The Selection Team will recommend to the local board that an agreement for educational specification services be awarded to the Educational Planner with the highest total points (the sum of scores given to each REFP by all voting members of the Selection Team) at the fee schedule negotiated. All short listed Educational Planners will be rated and ranked in order of their score on the Selection Team Rating Sheet and the team will reach a consensus as to which individual/firm is the most qualified. The team or a representative member of the team will then negotiate the fee for the educational planning services. Should the fee negotiations reach an impasse and the fee agreement not be reached, negotiations will continue with the next highest rated Educational Planner until an agreement is reached. The Selection Team will not return to the previous team once the impasse is reached on the fee and the next individual/firm is contacted for fee negotiations commence.

ADVERTISEMENT FOR

INVITATION FOR EDUCATIONAL FACILITIES PLANNING SERVICES

For

_____ **Project Name** _____ **Date** _____

The _____ County Board of Education is soliciting a proposal to perform educational facilities planning including building programming from qualified educational facilities planners. The individual/firm must possess certification from the Council of Educational Facilities Planners International and must have the Recognized Educational Facilities Professional Certification (REFP) to be considered. The individual/firm must be knowledgeable of School Building Authority requirements regarding educational specifications and also State Board Policy 6200, Handbook on Planning School Facilities requirements.

Specific project information can be obtained from _____ at _____ regarding the project requirements. The requirements of West Virginia Code 5G, Article 1-4 will be used as the basis for review and evaluation of all proposals. All proposals must be submitted to the _____ County Board Office at _____, West Virginia, no later than _____ p.m. local prevailing time on _____, _____. Proposals must be clearly marked IFQ for Educational Facilities Planner for _____ (project name). All proposals must include the experience and qualifications of the Educational Facilities Planner and must address the criteria for proposal evaluation. The individual/firm will be selected on the basis of qualifications and the cost to perform the services will be negotiated based on the most qualified firm. To request further information regarding the specifics of the proposal contact _____ at _____. Questions should be directed to _____ at (304) _____.

SELECTION TEAM RATING SHEET

Educational Facilities Planner

(Project Name)

Individual/Firm _____

Proposal Letter ____Y ____N Date _____

Evaluation Criteria	Criteria Value Potential	Score	Remarks
Project Understanding	10	_____	_____
Educational Planner & Personnel Resume	15	_____	_____
Educational Planners Experience & Knowledge Regarding:			
SBA Requirements	20	_____	_____
State Board Policy 6200	20	_____	_____
Project Approach	15	_____	_____
References	10	_____	_____
Completion Schedule	10	_____	_____
GRAND TOTAL	100	_____	(must score minimum of 70 pts to be considered)

Comments: _____

Signature _____ Date _____