

Capital Projects



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## **Request for Qualifications**

### **Capital Bond Planning Services**

**Northshore School District**

**August 22, 2024**

**Statement of Qualifications (SOQ) due at 2:00 PM on September 12, 2024**

## **I. Advertisement**

Northshore School District “**District**” is requesting qualifications for Pre-Bond Consulting services for creating a Capital Projects Program “**Program**” recommendation to the School Board. It is the intent of the District to select a Consultant to assist District Leadership with leading the Capital Bond Planning Task Force. The project will include preparing agendas, engagements activities and timelines; recruiting and selecting consultants to provide expert information when needed; prioritizing future capital projects; and preparing presentations for potential bond or levy measures. The Consultant will be expected to track attendance at CBPTF meetings and capture notes in a professional format to post to a public website. The Consultant may be asked to interact with other Northshore School District (NSD) departments and consultants to coordinate planning for district levies.

The complete RFQ is available at

<https://www.nsd.org/our-district/departments/business-services/purchasing/business>

## **II. Project Information**

The Capital Bond Planning Task Force (CBPTF), comprised of District residents, staff, and students, helps shape ballot measures for NSD bond elections. The CBPTF analyzes data collected from aging facilities and infrastructure, safety and security improvements, and other capital facility needs. This work is developed into a set of project recommendations to be presented to the School Board for referral to voters. Ballot measures are typically introduced on a four-year cycle; the next is anticipated to be in February 2026. Bond Planning Season typically occurs over the 18 months prior to a bond being presented to the voters and will begin in October of this year.

## **III. Scope of Work**

The District anticipates the following project tasks:

- Eight 2-hour meetings that progress until a recommendation is made (these meeting could be in-person or online)
- May include additional site visits with task force members
- Weekly planning sessions with NSD staff
- Engage the Capital Bond Planning Task Force in a facilities-planning process that supports current and anticipated educational programming reflective of key enrollment and utilization measures.
  - Include data that is currently being collected on physical and functional adequacy against current and anticipated programming.
- Services are expected to occur between approximately October 2024 and September 2025.

## **IV. Selection Process**

### **A. Method of Selection**

The District will convene a Selection Committee to review the submittals received and reserves the right to seek clarification about the submittals.

The District may award a contract based solely on the written qualifications. However, the District may request one or more consultants be interviewed for further evaluation. As part of such an interview, the District may require key personnel assigned to the contract to be present and discuss their approach to project management and facilitation services.

The District may elect to engage in negotiations with a selected short list of consultants.

The District reserves the right to include in any contract with a selected Consultant a provision for additional project management services, where such provision will be contingent on agreement to terms regarding such continued work and other factors determined by the District.

An initial evaluation of the submittals will be conducted based on the criteria set forth below. Submittals that do not meet the criteria will not be considered further unless the District waives any defects.

The District reserves the right to negotiate with the successful Consultant on pricing, scheduling, and other terms.

Minority and women-owned and veteran-owned firms are encouraged to apply and will be afforded the maximum practicable opportunity to compete for and obtain contracts for services.

## **B. Initial Screening Criteria**

### **Qualifications – (100 points)**

Consultant Overview: Provide a brief narrative describing the Consultant’s origin and experience providing services in the region in the K-12 sector.

Consultant Experience (35 points): This section should detail the background and qualifications to establish the Consultant’s experience and performance in the management of projects like the District’s project within the past ten (10) years. Please address specific experience in the following areas:

- Supporting school district capital facility programs
- Meeting facilitation
- Enlisting public engagement
- Analyzing demographics
- Developing creative financing solutions as part of the facility planning process
- Performing pre-bond and planning services
- Managing projects similar in scope and type, including location of each project and contact information of client.
- Working with School Districts in Washington State.

Approach and Methodology (35 points): This section should provide detailed discussion of the philosophy of management which you have applied to similar projects.

- Address your approach to engaging students, staff and community as it relates to development of the meeting plans and structure in an in-person environment.
- Address your approach to engaging students, staff and community as it relates to development of the meeting plans and structure in an online environment.
- Address your approach to collaborating with District staff in the planning process of individual meetings.
- Address your approach in assisting in the selection of content specific consultants needed to present information relevant to specific project considerations.
- Explain your approach and expertise in providing project controls including schedules, budgets, invoicing, and document controls.

Past Projects (15 points): Present past performance with the District or on similar contracts regarding facility and bond planning, cost analysis, project management, quality of work, and compliance with schedules. Greater weight will be given based on successful passage of bonds in the last five years.

References (5 points): Provide three (3) references of school districts you have guided through the pre-bond planning process.

Innovative Solutions (5 points): Outline any innovative approaches or solutions proposed by the firm to address program challenges or enhance program outcomes. Provide examples of innovative strategies implemented in past programs, if applicable.

Additional Information (5 points): Describe any systems or procedures utilized in managing school district bond planning projects, as well as the nature of the system and/or procedures that provide the District management of time, cost, quality, and scope controls.

Based on the recommendation of the Selection Committee, the District will enter contract negotiations with the selected Consultant.

**C. Schedule for Selection Process**

Dates	Selection Process
August 23 & 30, 2024	Advertisement for Request for Qualifications Published
September 12, 2024	Statements of Qualification due on or before 2:00 P.M.
September 13-18, 2024	Evaluate SOQs
September 19-20, 2024	Possible Interviews
September 23, 2024	Board approval of selected finalist
September 24, 2024	Notifications of selected finalist sent to Consultants
September 24-30, 2024	Negotiation of contract
October 1, 2024	Notice to Proceed

The District may adjust the above schedule. In the event of a schedule change after submission of qualifications, the District will inform consultants that have submitted qualifications of the changes.

**D. District's Right to Reject**

The District reserves the right to reject any and all submittals and re-advertise the Request for Qualifications at any time prior to approval of a contract with the selected Consultant. All costs incurred in the preparation of the Request for Qualifications process will be borne by the proposing Consultant. Qualifications submitted in response to this Request for Qualifications will become the property of the District and be considered public documents under applicable Washington State laws; such documents are subject to disclosure in response to public records requests under the Public Records Act, Chapter 42.56 RCW. The District also reserves the right to modify the scope of services as a result of the written submittals and/or interviews.

**E. Compliance with Procedures**

The submittal of any consultant failing to submit information in accordance with the procedures set forth herein may be considered non-responsive. Failure to comply with these procedures may result in the rejection of such a submittal.

**V. Submittal Requirements**

Qualifications must be submitted via email to:

Dri Ralph, Executive Director of Support Services, [dralph@nsd.org](mailto:dralph@nsd.org) and  
William Tribble, Director of Capital Projects, [wtribble@nsd.org](mailto:wtribble@nsd.org)

The District must receive submittals no later than September 12, 2024 on or before 2:00 P.M. Submittals received after the time specified will be returned to the consultant via email.

This solicitation does not commit the District to pay any costs incurred in the preparation, presentation, or return of submittals, including interview time, or to select any Consultant who responds.

In preparing the submittal, the proposing consultant will clearly identify the designated person of record responsible for any referenced project. If the proposing consultant is representing an individual's experience while employed with another consultant, the consultant of record for the project and the individual's role will be clearly identified.

Any questions or requests for clarification regarding this Request for Qualifications during the submittal preparation period must be sent via email to [dralph@nsd.org](mailto:dralph@nsd.org) and [wtribble@nsd.org](mailto:wtribble@nsd.org).

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