
Fort Worden Life Long Learning Center Public Development Authority Request For Qualifications (RFQ)

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|----------------------------------|--|
| RFQ Title: | Fort Worden Business and Management Plan |
| RFQ Purpose & Intent: | The purpose of this RFQ is to update the 2008 Business and Operation Implementation Plan from the Washington State Parks and Recreation Commission (Commission) for the Fort Worden Lifelong Learning Center Public Development Authority that will support a collaborative management approach for the long term success of Fort Worden Lifelong Learning Center. As a result of the consultant responses to this RFQ, the Fort Worden Lifelong Learning Center Public Development Authority (FW PDA) may select the top scoring respondents for a phone interview. Release of this RFQ does not obligate the Fort Worden Public Development Authority (FW PDA) or the State of Washington to take any further actions. |
| Response Due Date: | This solicitation is open from <u>May 18, 2012 through June 1, 2012</u> All responses, whether mailed or hand delivered, must be received by the Commission no later than 3:00 PM Pacific Daylight Standard Time June 1, 2012 Late, faxed, or electronic responses <u>will not</u> be accepted. |
| Submit Response to: | Dave Robison, RFQ Coordinator, Executive Director Fort Worden Lifelong Learning Center Public Development Authority 250 Madison Ave Port Townsend WA 98368 360.643.1770 drobison@fwpda.org <u>Reference: Fort Worden Business and Management Plan</u> |
| Consultant Eligibility: | The solicitation is open to those individuals or organizations that satisfy the qualifications stated herein. |

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1. INTRODUCTION

1.1 Procurement Schedule

The schedule listed below contains estimated dates of the activities related to this Request for Qualifications (RFQ). In the event it is necessary to significantly revise any portion of the schedule, a written amendment will be issued to all prospective consultants who have made contact with the RFQ Coordinator for this project.

Estimated Schedule of Events

| Item | Completion Date |
|---|----------------------|
| Advertise Request for Qualifications (RFQ) to prospective contractors | May 18, 2012 |
| Consultant statement of qualifications due | June 1, 2012 |
| Consultant evaluations | June 4, 2012 |
| Scoring by FW PDA Executive Committee and Staff | June 5, 2012 |
| Interviews with short-listed consultant teams (if necessary) | June 5, 2012 |
| Reference verification | June 5, 2012 |
| FW PDA Full Board review and recommendation | June 6, 2012 |
| Announce apparent successful consultant | June 7, 2012 |
| Letters sent to consultants not selected | June 7, 2012 |
| Contractor approval to proceed with work | June 7, 2012 |
| Public scoping meeting | June 19, 2012 |
| Project Scoping, Contract Negotiations, and Signing | June 19, 2012 |
| Completion of main body of work | August 17, 2012 |
| Public Meeting to Review Preliminary Findings | July 24, 2012 |
| Public Meeting to Review Draft Business Plan | August 21, 2012 |
| Submit Draft Business Plan to OFM/consultant for peer review | September 1, 2012 |
| Respond to any questions from OFM/Consultant | September 1-31, 2012 |

1.2 Introduction and Project Purpose

Fort Worden Lifelong Learning Center Public Development Authority hereinafter referred to as the "FW PDA" or "PDA", has taken on the task of updating the Washington State Parks and Recreation Commission approved long range 2008 Business and Operation Implementation plan for Fort Worden to specifically address the transition of the current State Parks Management model to a shared management of Fort Worden State Park with the FW PDA. The transition in governance has been the result of a multi-phase long-range planning project to expand public programming, preserve and develop historic facilities, and improve organizational administration and business management of Fort Worden State Park Conference Center, herein after "Fort Worden".

Phases I through III of this project resulted in development of park values statements, land classifications (land use zoning), long-term boundary (property acquisitions), and use and development principles to guide future planning, development, and management of Fort Worden. The State Parks and Recreation Commission approved these work products in January 2007.

Phase IV of this project resulted in the development of the following planning documents approved by the Commission at its September 2008 meeting.

- *Business and operations implementation plan* to guide program development, financial management, and operation of a life-long learning center;
- *Site and facilities use and development plan* to guide long-term use and development of the park and complete related environmental review;
- *Design guidelines* to guide on-going rehabilitation of structures and landscapes and ensure protection of the Fort Worden National Historic Landmark; and
- Recommendation from an assembled volunteer task force that evaluates the park governance and determine a management structure best suited to achieving the Commission's life-long learning center vision.

Planning documents are available online at <http://www.parks.wa.gov/plans/ftworden/>.

In the final phase of the planning process, the alternative management model chosen was a non-profit organization. The non-profit organization chosen in 2010 decided to step back from its initial undertaking of the potential management of Fort Worden and transition to a support organization. The FW PDA was approached by State Parks to begin discussions of being the lead organization in the co-management of Fort Worden Lifelong Learning Center. In current discussions with State Parks, the following options are acceptable and need further evaluation and refinement in a business and management plan to determine the financial viability of the two options and their probability of success.

Option 1:

- Lease options of selected undeveloped/non-renovated facilities in a phase approach for the purposes of redevelopment that supports the Lifelong Learning Center vision and financially sustainable operations.
- Lease of key revenue generated facilities at Fort Worden for the purposes of developing a consistent hospitality management entity pursuant to the vision of the Lifelong Learning Center and to create reliable revenues to support the development of the FW PDA's financial capacity.
- Management of selected services at Fort Worden that support the FW PDA as a facilitator of the Lifelong Learning Center vision and a hospitality manager that could include, but not limited to:
 - Food/concession services
 - Marketing
 - Programming
 - Reservations
- Revenue and cost sharing to maintain no negative impact on the current level of state subsidy supporting the operations at Fort Worden
- Development of new business opportunities at Fort Worden State Park that support the vision of the Lifelong Learning Center and creates additional revenue options

Option 2:

- FW PDA becomes a property and operations manager of the campus area of Fort Worden consistent with the vision of the Lifelong Learning Center
- All aspects of Option 1 and transfer of all existing leases (management of existing leases and leaseholders)
- Exploration of cost sharing possibilities related to maintenance of facilities and infrastructure

Both of these options should be evaluated and then compared and contrasted with the 2008 Business and Operation Implementation Plan strategies including a summary of changed circumstances that may have resulted in some of all of the 2008 options as becoming obsolete.

The FW PDA is seeking contractual assistance to complete a business and management plan to update the 2008 business and governance plan that will support the goals and objectives of both WA State Parks and the FW PDA in their collaborative approach for the long term success of Fort Worden Lifelong Learning Center. The consultant will complete all necessary and appropriate work to meet the project's purpose. The PDA requires professional assistance from an independent, outside party with the appropriate qualifications and experience to work with and complement the work of State Parks and the FW PDA Board and staff on aspects of the project.

1.3 Fort Worden State Park Vision and Mission

Park Vision: Fort Worden is a legendary gathering place where people are transformed through retreat, renewal, and discovery.

Park Mission:

Fort Worden is Washington's state park conference center for recreation, arts, culture, history, and the environment. It is a confluence of creative learning, recreation, and retreat opportunities for people of all ages, abilities, and backgrounds.

Fort Worden is a partnership of the Washington State Parks and Recreation Commission, the Washington State Arts Commission, resident cultural institutions and businesses and major funders, achieving financial vitality through coordination and collaboration. The partnership

1. promotes personal growth and professional development through conferences, workshops, performances, exhibitions and special events for individuals and groups.
2. develops and manages businesses that fund annual operations; and
3. attracts public-private funding for capital projects and endowment.
4. restores preserves and interprets the significant historical, cultural, and natural resources of the area.

Park Values

Stewardship

Fort Worden State Park develops, cares for and manages the park and serves visitors, volunteers and donors through local, native and sustainable environments and economies. Activities, programs and individual visitor experiences at the park are framed around discovery of, attentiveness to, education about and deep appreciation of its specific natural, cultural and historic environments.

Integration

The economic vitality of the park is a direct function of the economic vitality of all Fort Worden State Park partners and the Port Townsend community. All businesses, programs and services at the park are dynamically integrated in demonstration of shared and interrelated core values and economic strategies.

Learning: Creativity & Discovery

Fort Worden State Park serves individuals and gatherings dedicated to preserving and revitalizing cultural traditions, taking creative risks and generating new practices, ideas, and conversations.

Culture of Hospitality

Programs, services and facilities are designed, developed and promoted to attract, welcome and be accessible to all individuals whose interests are aligned with the missions, visions and values of the park partners.

Play

A commitment to individual health, renewal and transformation is enhanced by maintaining open space and facilities for retreat and enjoyment, as well as self-directed and organized outdoor programs that heighten respect for natural and cultural environment.

1.4 Changed Circumstances from the 2008 Plan

The 2008 Plan's recommendations have been dramatically challenged by the current state budget crisis and how it changes the financial assumptions and short-term financial viability of any future management and governance option for consideration. In addition, the following changed circumstances should be noted in the evaluation of management option(s) considered:

- Loss of general fund support to State Parks
- Potential of future cuts to State Parks operations and capital funding
- Changes in leadership/management staff at State Parks affecting Fort Worden

- Composition of the Commission has changed; five of the current Commissioners were not involved in the Lifelong Learning Center planning process
- Discover pass requirement at Fort Worden
- Recession and weak economy has slowed new private investment, and Fort Worden Partners growth and stability
- The PDA has agreed to pursue serving as the new managing entity
- Building 202 renovation underway
- Increased interest in Lifelong Learning Center project from key legislators
- Enhanced public scrutiny and need for more public involvement in discussing management options at Fort Worden

A planning roadmap and assumptions, approved at the start of the project, has generally guided long-range planning for Fort Worden State Park. Project staff has updated the roadmap to reflect the outcome of the four major phases (below). The roadmap is intended to describe the nature and extent of the long-range planning project and to assist prospective consultants in assembling appropriate in-house expertise or sub-consultants for their statement of qualifications.

Prospective consultants should note that the previous processes outlined below were fundamentally a public planning exercise. This included preparation of documents and planning materials for public distribution/web posting, public workshops, questionnaires, presentations to interested organizations, and other techniques to encourage public participation in the planning process.

Planning and Development Roadmap

Phase I – Start Up (4/2005 – 2/2006) Completed

Purpose: Gather information, plot a general process of planning and development, and engage volunteer planning assistance.

Tasks:

1. Gather site information
2. Establish participant roles and responsibilities
3. Research peer institutions
4. Recruit and appoint Technical Advisory Committee (TAC)
5. Develop project roadmap, budget, and secure funding
6. Adopt project roadmap and planning assumptions (State Parks and Recreation Commission August 4, 2005)

Phase II – Scoping/Contract Development 3/2006 – 5/2006) Completed

Purpose: Solicit qualifications of prospective consultants, select the most qualified, develop a refined scope of work, negotiate fees, and sign a consulting contract.

Tasks:

1. Prepare Requests for Qualifications (RFQ) and/or Requests for Proposals (RFP) for competitive procurement of consultant services

2. Select Architecture & Engineering (A&E) or Personal Services consultant team and other consultants
3. Negotiate detailed scopes of work and fees and sign contract(s) with consultants

Phase III – Conceptual Facilities, Programs, and Services Planning (5/2006 – 1/2007) Completed

Purpose: Determine conceptually what facilities, programs, and services should be provided at the park.

Tasks:

1. Identify opportunities/constraints pertinent to development of facilities, programs, and services and treatment of natural and cultural resources (conduct park/conference center enterprise opportunity gap analysis and estimate cost and financial performance of identified opportunities)
2. Prepare options and alternatives for development of facilities, programs, and services and treatment of natural and cultural resources (include financial analysis of options/alternatives)
3. Prepare preliminary recommendations for development of facilities, programs, and services and treatment of natural and cultural resources (include detailed financial analysis of preliminary conceptual recommendations and preparation of a preliminary, supporting park-wide business model, funding and financing strategies, and identification of applicable administrative/organizational structures)
4. Prepare final recommendations for development of facilities, programs, and services and treatment of natural and cultural resources (include preparation of finalized, supporting park-wide business model, funding and financing strategies, and recommended administrative/organizational structure)
5. Adopt final recommendations (January 11, 2007 State Parks and Recreation Commission meeting).
 - long-range plan for program development, historic preservation, and business administration (including phased transition and implementation strategies)
 - land classifications (park management zoning)
 - long-term park boundary (property acquisition/disposal plan)

Phase IV – Detailed Planning (8/2007 – 6/2008) Completed

Purpose: Work with a volunteer task force, park advisory committee, existing and prospective partners, and the public to prepare specific plans detailing how best to develop and manage facilities, programs and services identified in Phase III.

Tasks:

1. Appoint a volunteer task force to explore and recommend alternative governance structures, assist with additional business and facility planning tasks, coordinate with existing and potential non-agency partners, and complete other tasks as assigned by the Director;
2. Prepare a site and facility use and development plan (including preparation of SEPA environmental documents) guided by the Life-Long

Learning Center concept as described in the Fort Worden State Park Long Range Plan – Conceptual Facilities, Programs, and Services Recommendations;

3. Prepare site and architectural design guidelines to guide treatment of historic properties and development of new facilities at Fort Worden State Park;
4. Prepare a business and operation implementation plan that refines previous financial analyses and incorporates information from #1-3 (above) into an overall plan for park-wide organizational development, financial management, and coordination of management, programming, fundraising, and capital development with existing and prospective partner organizations.

Business and Governance Plan – (6/07/2012 – 9/31 /2012)

Purpose: FW PDA Board and staff will select a prospective consultant, or team of consultants, based on qualifications submitted in response to this solicitation. The PDA may elect to interview the consultant team with the highest scoring submittals. The prospective consultant will be expected to develop a scope of work based on this project description and be available for a meeting or video-conference meeting to review the scope and project schedule on June 19. The consultant will then incorporate any revisions from this meeting into a contract scope and fee for PDA approval and signature.

The Consultant should plan on attending two meetings (see Estimated Schedule on p.3) in Port Townsend over the course of the contract. Consultants submitting qualifications in response to this RFQ should not submit scopes of work or consulting fees at this time.

1.5 Project Description and Scope

Required disciplines

This project will require management of a wide array of consultant specialties. These include, but are not limited to:

Management Transition

- Organizational structuring and development of public and non-profit agencies
- Revenue and expense sharing
- New governing models for public agencies
- Enhanced operational and business functions

Business Planning

- Public-private-nonprofit administrative partnerships
- Conference center management/Hospitality management
- Lifelong learning (combination of higher education, vocational, self-improvement, self directed programs, workshops and classes)

Prospective consultants will need to assign a project manager with a demonstrated ability and experience in managing complex public governance

management issues and working collaboratively with professional Board and staffs. Project managers should also have demonstrated ability and experience working with the public sector where the agency project manager is not the ultimate decision-making authority. Prime consultants can be from firms with expertise in any of the areas listed above.

General Scope

The FW PDA is seeking consultant assistance to complete a business and management plan to update the *2008 Fort Worden Business and Operating Plan* that will support the goals and objectives of both WA State Parks and the FW PDA in their collaborative approach for the long-term success of Fort Worden Lifelong Learning center.

The Consultant is directed to identify strategies that can make the FW PDA financially self-supporting and will evaluate Option 1 (phased-in approach) and Option 2 (campus-wide approach) as potential management models (see Attachment D: Summary Matrix of the 2 Options).

The Consultant will evaluate the PDA's preferred approach of increasing *Destination Learning Programs* as a primary strategy for increasing programs at Fort Worden State Park in the shoulder seasons and for providing an enhanced revenue model consistent with the Lifelong Learning Center vision.

Business and Management Plan – *Prepare a business and management plan that evaluates the two options described above, refines previous financial analyses and incorporates information from the current situation, State Parks and Recreation Commission action items, recent financial information, goals and objectives, and FW PDA Board direction into an overall business plan for managing identified operational functions at Fort Worden State Park. The analysis will also include a matrix that compares and contrasts the changing circumstances from the 2008 plan to help the public and Commission better understand the viability and infeasibility of the 2008 business plan strategies.*

Previous phases of planning have developed the policy framework for development and management of Fort Worden. The purpose of the business and management plan is to determine the best approach from the two options provided to integrate the needs of both FW PDA and WA State Parks in their co-management of Fort Worden and its many partner organizations to successfully achieve the goals of the Lifelong Learning Center.

1.6 Project Funding

Funding for this project is anticipated not to exceed \$25,000. Further funding for additions to the project scope may be considered at the conclusion of this phase. Consultant will be asked to submit detailed scopes of work for additional work.

1.7 Consultant Team Arrangements

The PDA is looking for assistance from a consultant that can perform all functions necessary to complete this work. Any firm that can provide a part of this service is encouraged to contact other interested firms in the hopes of putting together a team of skilled specialists utilizing a primary consultant and subconsultant team arrangement (Joint Ventures will not be accepted). A “plan holder” list of consultants who have received notification of this RFQ and expressed interest is available upon request from the RFQ Coordinator.

1.8 Minimum Qualifications

To be qualified to respond and be considered responsive; consultants must possess the capabilities as described herein. Consultants must be or become licensed to do business in the State of Washington by the time of contract award.

1.9 Expected Result

The purpose of this RFQ document is to provide the FW PDA with a list of potential consultants interested and capable in providing the required services as described herein. As a result of the consultant responses to this RFQ, the FW PDA will select the top scoring respondents and may interview one or more of them. The FW PDA reserves the right to commence negotiations immediately with the top scoring respondent.

1.10 No Obligation to Contract

This RFQ does not obligate the Fort Worden PDA or the City of Port Townsend to contract for services specified herein. The FW PDA reserves the right at its sole discretion to reject any and all responses received without penalty and not to issue any solicitation document or contract subsequent to this RFQ. Release of this RFQ does not obligate the State of Washington or the Fort Worden PDA to take any further actions.

1.11 Definitions and Acronym Glossary

- A. **Public Organization:** The Fort Worden Lifelong Learning Center Public Development Authority is the public corporation created by the City of Port Townsend under the authority of RCW 35.21.730(5) that is issuing this RFQ.
- B. **Business Days and Hours:** Monday through Friday, 8:00 AM to 5:00 PM, local time Port Townsend Washington, except for holidays observed by the State of Washington.
- C. **Consultant:** *[Consultant’s Name]*, its employees and agents. “Consultant” also includes any firm, provider, organization, partnership, individual, or other entity responding to this RFQ. It shall also include any Subconsultant retained by Consultant as permitted under the terms of this RFQ.
- D. **QC:** Qualified Consultant; a consultant who has responded to this RFQ and has been determined to be qualified to provide services as described herein.
- E. **RCW:** The Revised Code of Washington (Washington State codified laws)
- F. **RFQ:** The Request for Qualification used as a solicitation document in this procurement, as well as all amendments and modifications thereto.

2. GENERAL INFORMATION

2.1 RFQ Coordinator

The RFQ Coordinator is the point of contact for this procurement. All communication between the consultant and FW PDA, upon receipt of this RFQ, shall be with the RFQ Coordinator as follows:

Dave Robison, Executive Director

Fort Worden Public Development Authority
250 Madison Ave
Port Townsend, WA 98368

Email:

DRobison@fwpda.org

Phone:

360.643.1770

Contact the RFQ Coordinator if you have any questions or concerns regarding this procurement. Consultants are to rely on written statements issued exclusively by the RFQ Coordinator. Communication directed to, or from, parties other than the RFQ Coordinator will be considered unofficial and non-binding and will have no legal bearing on this RFQ or subsequent actions.

2.2 Responsiveness & Responsibility

All responses will be reviewed by the RFQ Coordinator to determine compliance with administrative requirements and instructions as specified herein.

Consultants are specifically notified that failure to responsively and responsibly comply with any part of the RFQ may result in rejection of their response. The FW PDA reserves the right, however, at its sole discretion to waive minor administrative irregularities.

2.3 Proprietary Information

The FW PDA will not, in order to so protect, disclose any responses before a contract is signed. This will ensure fair competition without undue advantage to any consultant leading to private gain and public loss.

Any document(s) or information which the consultant believes is exempt from public disclosure (RCW 42.17.310) shall be clearly identified in their response and placed in a separate envelope marked with RFQ number, consultant's name, and the words "Proprietary Data" along with a statement of the basis for such claim of exemption. Marking of the entire response as "Proprietary" by the consultant is not acceptable. Failure to so label such materials or failure to provide a timely response after notice of request for public disclosure has been given shall be deemed a waiver by the consultant of any claim that such materials are, in fact, so exempt. Confidentiality is available only to the limited extent allowed in state law. The FW PDA may choose to disclose despite information being marked as confidential.

It is understood that all responses received become part of the FW PDA's official procurement file without obligation to the responding consultants.

3. Response CONTENTS

Consultant responses must be submitted in accordance with Section 3.1. Tabs must be used to separate major sections of the paper copy of the consultant's response. The three major sections of the response are to be submitted in the order noted below:

- Letter of Interest (consultant to provide, 2 page maximum)
- Required Consultant Information (see form in Attachment B)
- Statement of Qualifications (see form in Attachment C)

Consultants must provide information in the same order as presented in this document with the same headings. Each section must be addressed to clearly demonstrate a consultant's qualifications to fulfill the proposed services. Consultants are responsible for ensuring that responses are complete and understandable by evaluators. Incomplete or vague responses that do not adequately demonstrate the consultant's response meets these requirements may be considered non-responsive and may be rejected.

The responses require information, as defined below. All requested information is mandatory. The FW PDA will select the top scoring consultants for the pre-qualified solicitation pool based upon satisfaction of all of the requirements described below for the Statement of Qualifications (SOQ).

The sole scored area for this RFQ is the SOQ. Consultant capabilities will be evaluated based upon responses to the SOQ as described in Attachment C.

Failure to provide adequate information to demonstrate to the evaluators that your firm/team meets the requirements shall constitute grounds for disqualification.

Disqualification shall be established by any of the following conditions:

- The consultant states a requirement cannot be met.
- The consultant fails to include information requested.
- The consultant fails to include sufficient information to substantiate that a given requirement can be met.

3.1 Response Submission Format

Successful responses must contain **one (1) original paper version, three (3) paper copies and one (1) electronic version of the response on CD-ROM in the format and sequence outlined in Attachment A.** The preferred software format for the CD-ROM response copies is Microsoft Office 2007 or Adobe Acrobat Reader (.pdf format); if this presents any problem or issue, contact the RFQ Coordinator immediately.

Clearly mark your response: Fort Worden Business and Governance Plan RFQ, Attention: Dave Robison, RFQ Coordinator. **All responses, whether mailed or hand delivered, must arrive at the address no later than the date and time indicated on the cover page of this RFQ.** All responses and any accompanying documentation become the property of the FW PDA and will not be returned. Responses submitted late, by fax, or by other electronic means including E-mail, will not be accepted and will be considered non-responsive.

The original paper version, and all other paper copies, of the response must be on eight and one-half by eleven (8-1/2 x 11) inch paper and bound/secured with tabs separating the major sections of the consultant's response. Responses that

fail to follow the outline may be considered non-responsive and may not be considered. In the event of a discrepancy between the paper copy and the electronic version, the paper copy will prevail; however, the RFQ Coordinator reserves the right to seek clarification from the consultant.

In an effort to meet State of Washington sustainability policies and goals, Consultants are encouraged to use double-sided printing and recyclable materials. Consultants are highly encouraged to refrain from submitting RFQ responses in 3-ring binders or other non-recyclable presentation folders.

3.2 Letter of Interest

A Letter of Interest indicating acknowledgment of the RFQ, and any amendments issued, must be signed and dated by a person authorized to legally bind the consultant to a contractual relationship, e.g., the President or Executive Director of a corporation, the managing partner if a partnership, or the proprietor if a sole proprietorship. It must not exceed 2 pages in length.

3.3 Required Consultant Information

Consultants must provide the required consultant information in the order and format provided in Attachment B. Failure to respond to each requirement may disqualify the consultant from further participation in this RFQ. Copy the format for multiple entries as necessary to respond to each element of required information.

4. Evaluation

The purpose of this RFQ is to select consultants to include in a pool of pre-qualified consultants. From this pool, the FW PDA will select one consultant to negotiate and enter into a contract to provide services as described herein. A consultant's presence in the pool, in a particular category at a particular skill level, shall reflect that the consultant has:

- Submitted a responsive and responsible RFQ response; and
- Has had no termination for performance deemed significant by the FW PDA in the past three (3) years; and
- Been evaluated and scored against the Statement of Qualifications criteria in this RFQ; and
- Achieved an overall evaluation score as one of the top scoring consultants.

4.1 Evaluation Process

Responses will be evaluated strictly in accordance with the requirements set forth in this RFQ and any amendments that may be issued. All responses, including the Letter of Interest and Consultant Required Information in Attachment B, will be reviewed by the RFQ Coordinator for completeness and compliance with the administrative requirements and instructions specified in this RFQ. Responsive and responsible responses will advance to the evaluation team. Evaluations will be based solely on submitted materials. The FW PDA may, upon completion of the evaluations of the written SOQs, conduct an in-person interview with project managers of the highest scoring firms. Consultants should be prepared to have their project manager available for a phone interview on either June 4 or 5, 2012.

Responses that fail to provide specific information to adequately describe their response to any question contained in this RFQ may be deemed non-responsive and may be rejected. The RFQ Coordinator or a designated evaluation team member may contact the consultant for clarification of any portion of the consultant's response. Only responses meeting the requirements will advance for further evaluation.

4.2 Statement of Qualification Requirements (Scored)

The purpose of the Statement of Qualifications (SOQ) is to provide the FW PDA with evidence that the consultant has sufficient technical project experience and expertise in providing the required services as described in this RFQ. The SOQ will be evaluated and scored based on the consultant's responses to Attachment C.

4.3 Scoring by Review Team

Introduction

Statements of Qualifications should contain responses to all areas listed. Failure to do so may result in failure to pass administrative screening. Maximum points are indicated by category below.

1. (10 points) Experience in project management, including specific experience with project of this complexity, size, type, and disciplines (all projects must be those managed by the proposed project manager).

2. (50 points) Experience and expertise in one or more of the following fields: Business and operational planning; transition planning for new management or governance structure; organization structuring; development of partnership agreements.
3. (20 points) Experience and expertise in one or more of the following fields: revenue forecasting; identification of alternative revenue sources; capital facilities financing and financial planning
4. (30 points) Experience and expertise in one or more of the following fields: Public-private-nonprofit administrative partnerships, organizational capacity assessments; development of philanthropic entities; coordination planning with various alternative governing organizations
5. (40 points) Experience and expertise in one or more of the following fields: education based public programming, arts and culture program development, recreational/fitness program development, natural and cultural resource interpretation program development, and museum/educational program development
6. (10 points) Experience and expertise in one or more of the following fields: Public participation processes, communications and technical writing.

The scoring team will use the following guidelines in determining scoring:

Relevant Experience:

- Prospective consultant has a proven track record of experience in delivering high quality products within subject category (100%)
- Prospective consultant has solid experience within subject category but does not have a proven track record of delivering high quality products in all aspects of the subject or the experience is not fully established (75%)
- Prospective consultant has some experience within subject category or related subject but does not have a proven track record of delivering products in that subject (50%)
- Prospective consultant has not demonstrated experience within the subject category, but appears to have personnel that could creatively and competently execute the work. (25%)

Expertise

- Prospective consultant demonstrates outstanding expertise in the subject category through a combination of academic background and achievement, professional certifications/training, and recognition by peers (100%)
- Prospective consultant demonstrates a solid combination of academic background and professional certification and training in the subject category (75%)
- Prospective consultant demonstrates a combination of academic background and professional certifications and training in the subject category or closely allied field (50%)

- Prospective consultant demonstrates a minimum necessary combination of academic background and professional certification and training required to complete work in the subject category (25%)

Effective Communication

- Prospective consultant demonstrates an exceptional ability to convey complex information in a clear, concise, creative, and understandable manner through a combination of narrative text and supporting graphics, figures, etc. (100%)
- Prospective consultant demonstrates the ability to convey information in a manner adequate to the needs of the project (50%)

4.4 Evaluation Team

An evaluation team consisting of representatives from FW PDA Board, volunteer staff and other FW PDA authorized individuals will perform the evaluation of the consultant's responses. Responses will be evaluated strictly in accordance with the requirements set forth in this RFQ and any amendments, which are issued.

4.5 Reference Checks

Consultants shall include a minimum of three (3) references per line item indicated in the Statement of Qualifications (Attachment C). The same reference may be used for more than one line item. References should speak to the quality of the consultant's previous work as well as their ability and capacity to deliver similar projects on time and within budget. Consultants may also provide Internet websites that contain information regarding past or current projects that are related to this RFQ.

The FW PDA reserves the right to obtain information concerning the consultant's ability and capacity pertinent to this RFQ from any and all sources, and to consider such information in evaluating the responses and selecting the Qualified Consultants (QC). It is the consultant's responsibility to alert the references provided that they have been named as potential references under this RFQ.

4.6 Notification of Qualified Consultants (QC)

Notifications of qualified consultants will be E-mailed to all responding consultants in a batch format according to the Procurement Schedule to the RFQ Contact email address provided in the consultant's response (reference Attachment B (1)(f)). Failure to provide RFQ Contact email will prevent the FW PDA from including your firm in the initial notification process.

4.7 Appeal Process

If prospective consultants have any questions about the qualified consultant selection process at anytime, they are encouraged to contact the RFQ Coordinator. At this RFQ stage, decisions by the FW PDA will be final with no appeal process provided.

5.ATTACHMENTS

Attachment A: Checklist for Contents And Responsiveness

This checklist is provided as a convenience for your response preparation. This form will also be used to screen each response for initial responsiveness. If you have any questions concerning these requirements please contact the RFQ Coordinator.

- _____ **One (1) complete original response, ten (10) paper copies and one (1) electronic version on CD-ROM** copy of the required documents were submitted to the appropriate location and on time per the RFQ schedule.
- _____ **Letter of Interest** has been **signed** by an individual authorized to legally bind your company and the original signature copy has been submitted.
- _____ All **Required Consultant Information** (Attachment B) has been included in consultant's response.
- _____ **Statement of Qualification Requirements** have been addressed in each subject category (Attachment C).

Attachment B: Required Consultant Information

(1) Consultant Identifying Information

(a) Consultant Name and Address

Provide consultants name, address, principal place of business, and telephone number.

Name: _____
Address: _____
City, State, Zip: _____
Phone: () _____
Company Internet Website: _____

(d) Location Address (if different from above (1)(a))

Address: _____
City, State, Zip: _____

(d) Principal Officer

Name, address and business telephone number of the principal officer (e.g.: President, Vice President, Treasurer, Board Chairperson) of the consultant organization.

Name & Title: _____
Address: _____
City, State, Zip: _____
Email: _____
Phone: () _____

(d) Organization and Year

Legal status and business structure (corporation, partnership, sole proprietorship, etc.) of the consultant and the year entity was established.

Status: _____
Year Established: _____

(e) Employer Identification

Employer identification numbers. Sole proprietorships and individuals may provide their Social Security number in lieu of a Federal Tax Identification Number.

Federal Tax Identification No. (T.I.N.) _____
[WA Uniform Business Identifier](#) _____

(f) RFQ Contact

Contact information for consultant's RFQ Contact.

Name & Title: _____
Address: _____
City, State, Zip: _____
E-Mail: _____
Phone: () _____
Fax: () _____

(2) **Additional Mandatory Information**

(a) **Contract Performance**

Indicate if the consultant has had a contract terminated for default in the last three- (3) years. Termination for default is defined as notice to stop performance which was delivered to the consultant due to the consultant's non-performance or poor performance and the issue of performance was either (a) not litigated due to inaction on the part of the consultant, or (b) litigated and determined that the consultant was in default. If no such terminations exist, the consultant is to so declare.

Note: If the consultant has had a contract terminated for default in this period, the consultant shall submit full details including the other party's name, address, and phone number. The FW PDA will evaluate the facts and may, at its sole discretion, reject the response on the grounds of past experience.

Termination: _____
Reason: _____

(b) **Subcontractors**

If the responding consultant is using the capabilities of any subconsultant(s), that are not a part of the consultant's company/business, in responding to this RFQ, then these entities must be identified below. If no such relationship exists at the time the response is submitted, then use of any subconsultant(s) requires prior written consent of the FW PDA.

Name: _____
Address: _____
City, State, Zip: _____
Phone: () _____
General Description of Responsibilities and/or Categories of Expertise: _____

Attachment C: Statement of Qualifications (SOQ)

EXPERIENCE, EXPERTISE, AND EFFECTIVE COMMUNICATION

Within their SOQ's, prospective consultants, and/or their associated sub-contractors, should demonstrate expertise and experience in the full range of technical subjects and academic fields necessary to meet the purposes of the project. The narrative portion of the SOQ should respond to each of the following within a maximum total of twelve pages, plus a maximum two-page Letter of Interest. A maximum additional five pages of work examples representative of the firm's projects are permitted.

For each of the following subject areas, identify what firm and individuals within that firm you propose to use for the project. If the scope of the project is too general to determine the specific individual at this time, identify several individuals you may use depending on a refined scope. Consultants shall include a minimum of three client references per subject area.

1. Project management, including specific experience with project of this complexity, size, type, and disciplines. All referenced projects must be those managed by the proposed project manager. (1 page max.)
2. One or more of the following fields: Business and operational planning; transition planning for new management or governance structure; organization restructuring; development of partnership and lease agreements. (2-page max.).
3. One or more of the following fields: revenue forecasting; identification of alternative revenue sources; capital facilities financing and financial planning (2-page max).
4. One or more of the following fields: Public-private-nonprofit administrative partnerships, organizational capacity assessments; development of philanthropic entities; coordination planning with various philanthropic organizations (1 page max.).
5. One or more of the following fields: education based public programming, arts and culture program development, resource-based recreational program development, natural and cultural resource interpretation program development, and museum/educational program development (1 page max.).
6. One or more of the following fields: Public participation processes, technical writing and communication. (1 page max.).

**FORT WORDEN LIFELONG LEARNING CENTER
PDA MANAGEMENT OPTIONS
(For business plan development)**

| PRIMARY BUSINESS PLAN COMPONENTS/FEATURES | OPTION 1 | OPTION 2 |
|---|---------------|-------------|
| 1. Identify & evaluate renovation of unrestored/ underutilized buildings for use by new or existing programmatic partners/tenants <ul style="list-style-type: none"> • Must support LLLC vision • Recruit new tenants/partners • Undertake and manage A&E and capital renovation • Future lease revenues support PDA operations | X | X |
| 2. Explore and evaluate the redevelopment of Buildings 225 and 298 for use for enhanced accommodation uses <ul style="list-style-type: none"> • Identify the cost and return on investment to Improve the appearance and comfort (FF&E) of the overnight accommodations • Prepare RFP for private investor/operator | X | X |
| 3. Assess lease and property management options for: <ul style="list-style-type: none"> • Officers Row and NCO housing units • Commons | | X |
| 4. Assist Peninsula College in completing capital campaign for Building 202 <ul style="list-style-type: none"> • Provide property management and operational services • Recruit tenants and programmatic users | X | X |
| 5. Evaluate the management of selected programmatic and hospitality services to implement the LLLC: <ul style="list-style-type: none"> • Marketing • Programs • Reservations (?) • Food services/concessions • Technology (IT) | X (phased) | X |
| 6. Evaluate revenue and cost sharing strategies between the PDA and Parks to reduce current level of state subsidy | X | X |
| 7. Identify and develop new programmatic partners and business opportunities to advance the implementation of the LLLC <ul style="list-style-type: none"> • Destination Learning Programs • Conferences and retreats • Support Services • Events | X | X |
| 8. Transfer all existing leases to the PDA <ul style="list-style-type: none"> • Serve as property manager for all tenant leases in campus area (Fort Vancouver model) | | X |
| 9. Develop a capital facilities plan for the campus and explore cost sharing options related to long-term building maintenance and infrastructure | | X |
| 10. Compare/contrast these two management options to the 2008 Business and Operating Plan governance scenarios | X | X |

