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## MEMORANDUM

No. 2008-101

**To:** District Superintendents, Business Managers, Facility Managers, & Architects  
**From:** Nancy Thomson  
**Date:** February 1, 2008  
**Re:** SFC Processes for Beginning a Capital Construction Project

On January 16, 2008 the SFC hosted a workshop to visit with our architectural community regarding new processes initiated by the School Facilities Commission. Architects and engineers from across the State, and from adjacent states, were invited to join the workshop.

Discussion topics included (1) more refined approach to initiating a capital construction project, (2) more refined approach to selecting an A/E team, (3) new space guidelines, (4) the charrette process, and (5) expectations on behalf of the project Architect and Owner.

Much of the discussion centered on the approach to initiating a capital construction project. The following illustrates the processes the SFC has recently implemented in several districts and will continue to refine and implement with future capital construction projects:

- *Educational Specifications* – School capital construction projects will now require preparation of educational specifications prior to undertaking design. This should expedite the design process and focus the attention of the educational communities on the functionality of their facilities. SFC has drafted sample educational specifications for elementary, middle and high schools. These draft specifications, located on the SFC website at <http://sfc.state.wy.us/Forms>, can be used by Districts and planners as a starting point for development of district, school and program specific specifications.
- *Select Delivery Method (CMAR, DBB, DB)* – It is critical that we, the SFC and District as joint-owners in projects, carefully evaluate the advantages and disadvantages of each construction delivery method, construction manager at-risk, design-bid-build, and most recently, design-build. The selection of the most advantageous method must occur before professional services are solicited. The selection of a particular method may impact the qualifications and selection of the professional service team, and the timing and budget of a project.

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- *RFQ for A/E Services* - The SFC website will include standard forms for Request for Qualifications and Request for Proposals for architectural services. It is imperative that a competitive process be utilized to select the architectural team, and that the project specific educational specifications be included in the RFQ, so that interested firms clearly understand the scope of the work when applying for projects.
- *RFP for A/E Firms* – The District, in collaboration with the SFC, will “shortlist” the architectural qualification submittals. Once firms have been chosen from the RFQ, the District will solicit proposals from each “shortlisted” firm, in the form of a Request for Proposal. The proposal will include a price to perform the scope of services. Again, consensus must be reached between the District representative and SFC representatives on the selected firm, based on qualifications and price, before the work can be awarded.
- *A/E – SFC – District Contracts Executed* – Two contracts will be executed simultaneously: (1) the Contract for Professional Architectural and Engineering Services between the District and the Architect, and (2) the funding contract between the District and the SFC, which corresponds to the accepted scope of work and fee proposed by the chosen architect.
- *Coordination Meeting with A/E, SFC & District* – A coordination meeting is critical to ensure all project participants are clear on the project boundaries, including schedule, project budget, allowable square footage, roles of each project team member, general scope of work, and the roles of various participants. At this coordination meeting, the parties will also select a professional to facilitate the charrette workshop and proposed date for the charrette.
- *Design Charrette* – This is a facilitated workshop that involves discussions of innovative school design trends and visionary techniques used to engage students and staff in the educational delivery system. By using curriculum-driven educational specifications as a basis for the charrette process, the facilitator encourages discussion and exploration of designs which best articulate the district’s learning plan. The resulting conceptual design should be within SFC space guidelines, if extenuating circumstances necessitate an exception, the exception may be requested in a public meeting before the Commission. The conceptual designs are then turned over to the A/E design team to further refine throughout the design phases.
- *Design Phases* - The design process continues through the typical phases of design: schematic drawings, design drawings, and construction drawings. Value engineering (VE) team members will also participate in the charette process, and the subsequent VE sessions will then be limited to evaluation of fidelity to the conceptual design and the technical aspects of the design. The intent of this process is to minimize the frequency and extent of the VE reviews in the later stages of design. Early consultation with and by all parties will ensure this.

Your assistance in implementation of these processes is greatly appreciated. Please contact your Project Manager or me with further questions.

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