



## LEARN DC

### Request for Proposals (“RFP”) for Owners Representation

This document reflects a Request for Proposals for Owners Representation Services (the “services”) for a new campus for LEARN DC Public Charter School (“LEARN”). This RFP will be publicly available and distributed to established individuals and firms with experience in providing overall project management from conceptual design to turnover and occupancy, with a preference for firms with experience building public charter schools. Proposals will be evaluated by LEARN’s leadership and its representatives.

#### **LEARN: PROJECT OVERVIEW**

LEARN intends to build a permanent elementary and middle school facility of up to 50,000 sf, located on leased land at 100 Duncan Ave SW, Washington, DC 20032 and within the Joint Base Anacostia-Bolling (“JBAB”) installation. LEARN currently leases 5.7 acres from JBAB and is operating out of +/-18 modular units. The schools is expected to be open for the 2028-2029 school year

LEARN has engaged several parts of the project team listed below already and is now seeking an Owners Representative to guide and manage the project to completion.

Studio Twenty Seven Architecture has been engaged and is developing plans, a copy of the current set is available [Here](#).

LEARN is seeking an Owners Representative for the following approximate scope of work. It is expected that this is a guide only and respondents should note that they are expected to interpret their scope broadly and should note any exceptions or exclusions.

#### **SCOPE OF WORK**

Acting on behalf of the Owner, the Owner’s Representative shall provide the following services (collectively, the “Services”):

##### **A. Pre-Design Phase**

###### **1. Orientation & Analysis:**

Assist Owner in reviewing, identifying and prioritizing the Project's goals and objectives. Recommend changes necessary to better define the Project’s scope and requirements. Assist Owner in identifying short and long-term project requirements.

###### **2. Project Organization:**

Based on the Project’s goals, objectives and requirements, review options for organizing the design and construction activities and purchasing goods and services. Develop and recommend a project delivery method, which identifies the activities, responsibilities and contractual relationships of the consultants, contractors,

vendors and other entities required to execute the Project.

**3. Budget Development:**

Based on the Project's goals, objectives and the project organization plan, assist Owner in developing and maintaining a master program budget that appropriately addresses all project and development costs (the "Master Budget").

**4. Schedule Development:**

Based on the project organization plan (preliminary organizational plan attached), prepare and update, as required, a master project schedule (the "Master Schedule"). The Master Schedule shall address all elements of the Project, including team assembly, pre-design activities, design phase work, bidding, contract award and negotiation, building construction, installation of furnishings, equipment & telecommunication systems, move-in, and substantial completion and final completion of the Project.

**5. Team Assembly:**

Assist the Owner in identifying candidates, soliciting qualifications and proposals, recommending the award and negotiating contracts for all team members, including architectural and engineering design services, interior design, specialty consultants, surveys, geo-technical reports, general contractor or construction management services, material testing services and other entities identified in the project delivery plan (collectively, the "Project Team"). Some of these may be already in place.

**B. Design Phase**

**1. Administration:**

Act as Owner's representative, schedule and attend Project design meetings to assure that the Project's goals, objectives and requirements are being met. Provide administrative and oversight services to ensure that the design team is in compliance with the Master Budget and Master Schedule. Regularly consult with Owner on all other pertinent activities relating to the Project. Convey and coordinate Owner-requested items to the Project Team. Assist in the development of construction phasing documents and coordinate the inclusion of Owner supplied items, if required.

**2. Consultant Contract Administration:**

Provide contract administration of all members of the Project Team contracted directly to Owner to include:

- a. Oversight services to include the administration and coordination of all service efforts and the review and recommendation of requests for additional services.
- b. Reviewing and recommending approval or disapproval of all requests for payment, certifying that all services for which payment is requested have been performed per the dictates of the relevant contracts. All payment requests by a member of the Project Team shall include receipt and review of associated waivers of lien and sworn statements.
- c. Assisting Owner in resolving any disputes that may arise between members of the Project Team that might impact the progress or cost of the Project.

**3. Cost and Progress Reporting:**

Monitor actual costs and progress performance of the Project Team members against the approved Master Budget and Master Schedule. Prepare a monthly report to the Owner showing actual versus budgeted costs for all Master Budget line items.

**4. Design Development/Value Engineering/Project Documents:**

Review and comment on all drawings, specifications and contracts for the Project (collectively, “Project Documents”), including, without limitation, design-development and design and construction documents, and in association with the members of the Project Team, implement a systematic value management program employing value engineering, systems analysis and life-cycle costing. Assist in the identification of alternate design solutions that achieve Owner's functional requirements at the best balance between cost, performance and reliability. Assist Owner in evaluating the benefits and disadvantages of items offered as design or construction alternatives by members of the Project Team and contractors and in identifying and purchasing any long lead equipment, which evaluations shall take into account the Project’s goals, objectives and requirements, the Master Budget and the Master Schedule.

**5. Permit Coordination:**

Represent Owner as required to coordinate design data and ensure representation relative to zoning, permitting and other governmental matters. Attend and represent Owner at meetings of applicable governmental agencies with respect to zoning, permitting and other governmental matters relevant to the Project. Monitor code review activities and advise Owner of any items that will affect the Master Schedule or Master Budget.

**6. Utility Coordination:**

Meet with JBAB representatives concerning public utilities (water, gas, electric, telephone, etc.) serving the Project. Review service requirements and routing. Coordinate utility information with the members of the Project Team to assure service requirements are being met. Assist Owner in negotiating service agreements as necessary.

**7. Bidding/Contractor/Subcontractor Administration:**

Based on the project organization plan assist the members of the Project Team in soliciting and pre-qualifying contractor, consultant and major subcontractor candidates and suppliers. Review forms, notices, instructions and requirements with Owner prior to release for bidding. Assist in developing methods for release of bidding documents. Schedule and attend pre-bid conferences on Owner’s behalf. Assist Owner in subsequent receipt of bids. Review contractor, consultant and subcontractor bids and provide Owner with an analysis and recommendation for contract award.

**8. Bidding/Proposal Administration (Owner Supplied Work):**

Assist Owner and members of the Project Team in soliciting and pre-qualifying contractor candidates and suppliers for Owner furnished items. Assist Owner and members of the Project Team in releasing the documents for bid and subsequent receipt of bids. Provide Owner with an analysis and recommendation for contract award. Assist Owner in negotiating and executing the agreements for construction, procurement, installation and related activities of Owner furnished items.

**9. Contract Negotiation:**

Based on the Project delivery method, coordinate negotiation of final agreements relative to cost and terms. Review contractor agreements with Owner’s legal and risk consultants. Coordinate the submittal, review and execution of all construction and material supply agreements.

**B. Construction Phase**

**1. Construction Oversight:**

Establish and attend, as Owner's representative, regularly scheduled on-site construction coordination meetings. Review construction progress for conformance with the Master Budget, Master Schedule and Project Documents. Attend Project construction meetings. Monitor the shop drawing submittal and review process. Maintain a central file of Project Documents.

Notify the Owner if Owner’s Representative becomes aware that the work of any member of the Project Team is not being performed in accordance with the requirements of the Project Documents. As appropriate, Owner’s

Representative shall have authority, with written authorization from Owner, to require additional inspection or testing of the work in accordance with the provisions of the Project Documents, whether or not such work is covered, installed or completed. Owner's Representative shall review test reports and notify Owner and the relevant Project Team member(s) of deficiencies in the work of which Owner's Representative becomes aware, shall advise Owner of projected consequences of such deficiencies and shall make recommendations to Owner with respect thereto.

**2. Consultant Contract Administration:**

Prepare and maintain a log of actual and proposed Project changes and requests for information that affect the Master Schedule or Master Budget. Review billings presented for payment. Verify all applications for payment and the submission of all appropriate lien waivers and contractor affidavits. Prepare a monthly report of all invoices submitted on the Project that summarizes contract status against the Master Budget, Master Schedule and Project Documents.

**3. Progress Reporting:**

Visit the Project site at appropriate intervals (but not less than an average of once per week) to provide Owner with an objective opinion as to actual progress against the Master Budget and Master Schedule. Provide a monthly report to Owner that addresses schedule status, budget status, change requests, change orders, information and action required, as well as overall status of the work of the Project.

**4. Change Request Management:**

Assist Owner in evaluating all change requests and change orders. Maintain a log of all requests for information, change requests and change orders and their potential effects on the Master Budget and Master Schedule and the available contingencies, if any. Review and evaluate all pricing associated with the change requests and change orders. Make recommendations to Owner if change requests should be processed as an approved change order. Monitor the timely submittal and execution of contract changes and review them for completeness and accuracy.

**5. Coordination of Owner Supplied Work:**

Monitor the production, delivery or relocation of Owner furnished equipment and furnishings to assure effective coordination with the construction and occupancy schedule. Schedule meetings with vendors and contractors to review requirements for incorporation of Owner furnished items into the Project. Assist Owner in preparing for receipt and acceptance of Owner equipment.

**6. Regulatory Agency Coordination:**

Assure the Project Team in communicating with and responding appropriately to all governmental agencies having jurisdiction over the Project. Maintain a file of all agency reviews, inspection certificates and permits. Attend final occupancy reviews as the Owner's representative.

**7. Utility Coordination:**

Monitor the planning and installation of all required utilities into the Project. Schedule meetings with JBAB representatives, the utilities and the contractor to review site requirements and schedule utility installation.

**8. Conflict Resolution:**

Assist Owner in resolving any disputes that may arise between members of the Project Team, including the Project architect and contractors or subcontractors working on the Project, which might impact the Master Budget or Master Schedule.

**9. Confirm Completion:**

Owner's Representative shall attend on-site reviews of the Project and notify Owner when Owner's Representative believes the work under one or more of the Project Documents is substantially complete.

**10. Owner Acceptance:**

Assist Owner in the preparation of preliminary and final punch lists and monitor the contractor's progress against those lists to ensure timely project completion. Review completion certificates and recommend approval of payment, where appropriate.

**11. Drawings:**

Obtain from contractors and relevant members of the Project Team record drawings or, if required by the applicable Project Documents, "as-built" drawings, after construction of the Project has been completed.

**C. Post-Construction Phase**

**1. Occupancy Schedule:**

Based on the Master Schedule and organizational plan, develop and maintain, as necessary, a detailed schedule indicating phased occupancy of the new facilities as they become available. Review turnover procedures with the contractor and Owner. Establish responsibilities for access, maintenance and repair of damage to occupied areas during punch list operations, if required.

**2. Move Coordination:**

Assist Owner in selection of a mover. Coordinate turnover schedule with Owner, contractor and movers. Schedule a meeting with movers and the contractor to review site conditions and establish responsibilities for completed work.

**3. Project Close-Out:**

Complete the final close-out of the Project by: (1) overseeing that all closeout requirements and punch lists have been completed in a timely and efficient manner; (2) overseeing the completion and execution of all contract requirements, including the processing of final payments, the receipt and review of all affidavits, lien waivers and the release of all retention amounts; (3) obtaining, or causing the contractor to obtain, all government approvals required for the legal use and occupancy of the Project; (4) obtaining and reviewing all Project warranties and other items required by the Project Documents, including all required record or "as built" drawings; and (5) coordinating turnover of all other relevant Project documentation to Owner.

**RFP PROCESS**

**Response Submittal Requirements**

Kastenholz Construction Services, LLC (KCS) has been engaged to conduct this RFP process. KCS has provided similar services to LEARN for projects in the metro Chicago area but will not be the Owners Representative for this project. Any response to the RFP should be concise and presented in the same order as the elements listed below. Respondents will submit copies of their completed proposal in electronic copy to:

James Kastenholz  
Kastenholz Construction Services, LLC  
[jim@thservices.com](mailto:jim@thservices.com)  
773-908-7182

by **April 20, 2026, at 5:00 p.m. EDT**

Questions or clarifications may be submitted via email no later than April 13, 2026, 5:00 PM CDT and will be replied to no later than 48 business hours after submittal via email to all respondents.

Proposals should be submitted with clearly corresponding sections to the following items below.

1. Cover letter summarizing your proposal, qualifications and proposed project team
2. Firm name, address, phone number, web address, and point of contact email
3. Firm history and experience, including organizational and executive management background, number of employees, annual business revenue, and relevant educational / charter / non-profit construction experience (inclusive of any experience in Washington, DC, JBAB, or other military installations)
  - a. Bios for all proposed project team members
  - b. Contact information for all proposed project team members
4. Current project workload
5. Firm's approach to diversity and representation of people of color within its firm and on this proposed project team
6. Examples of project documentation such as
  - a. Master Budget and Budget Tracking
  - b. Master Schedule and schedule tracking
  - c. Project Status Reports
7. Scope of work and fees including a full description of each scope of work item along with associated fees, including those tied to any sub-consultant contracts
8. References – contact information for a minimum of four references

**DUE DATE: April 20, 2026, at 5:00 p.m. EDT**

**Selection Process and Criteria**

LEARN's leadership, along with its consultants, will review the responses to the RFP. LEARN will request any additional information and schedule interviews with finalists, as needed, ahead of quickly making its selection.

LEARN will develop and apply selection criteria including but not limited to:

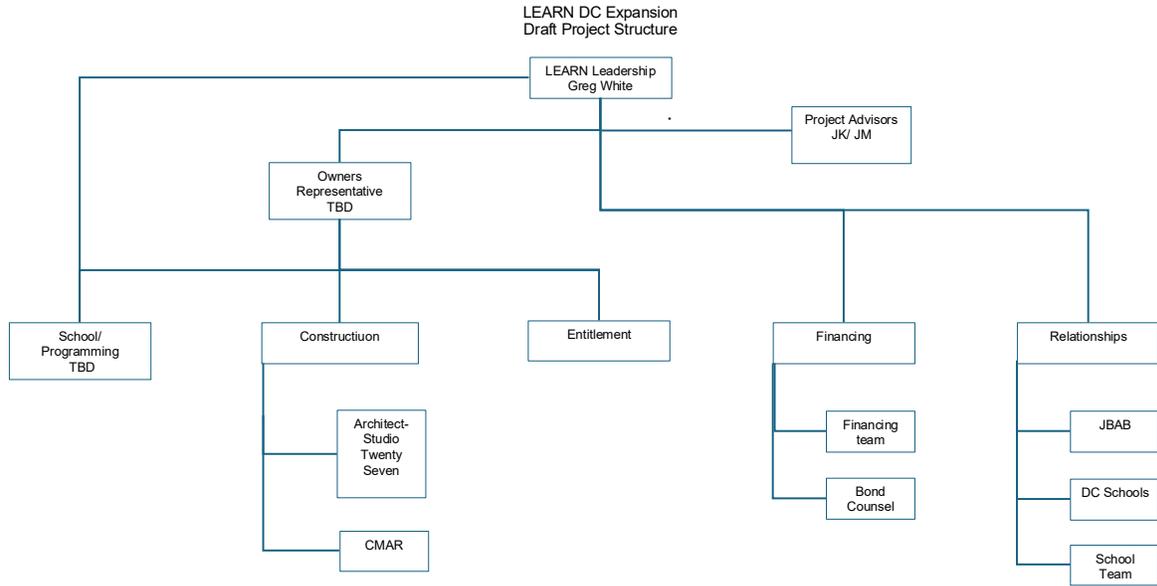
- Firm Qualifications
- Staff Qualifications
- Project Approach
- Fees

This scoring will consider all material submitted in response to this RFP, along with all additional information as part of the follow-up questions and the interview process.

**Anticipated Selection Schedule:**

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|---|--|
| ▪ Proposal Deadline                             | <b>April 20, 2026</b>                  |
| ▪ Follow up Questions & Interviews, as required | <b>Week of April 27, 2026 (target)</b> |
| ▪ Notify Selected Firm                          | <b>Week of May 4, 2026 (target)</b>    |

### DRAFT Project Organization Chart



March 16, 2026