AUSTIN Independent School District | Contract and Procurement Services

Request for Proposals
21RFP061 Planning Partner for Facilities Master Plan

Date	Event
December 1, 2020 December 8, 2020	Advertise/Issue Date
December 8, 2020	Virtual Pre-proposal conference at 10:00AM – Please see additional instructions
December 11, 2020	Questions due by 5:00PM
December 17, 2020	Questions and Answers and final addendum posted on Contract & Procurement Services' Website
January 5, 2021, 3:00 PM	RFP Due Date and Time – Please see additional submission instructions
January 8, 2021 5:00PM	Interview Invitations sent to shortlisted firm(s)
January 13/14, 2021	Interview(s) with shortlisted firm(s)
February 22, 2021	AISD Board meeting for Review/Approval

Deliver Electronic Proposals to:	**Contact Person:**
sara.hildebrandtgaspar@austinisd.org By 3:00PM CST on January 5, 2021 Using the Subject Line **"21RFP061 Submission – CONFIDENTIAL"**	Sara Hildebrandt Gaspar Contract & Procurement Services sara.hildebrandtgaspar@austinisd.org **HUB Coordinator Contact** Melfi Penn melfi.penn@austinisd.org

- Question and Answer Protocol: Proposers seeking clarification or have questions pertaining to this RFP must submit questions in writing to Sara Hildebrandt Gaspar, Senior Procurement Specialist, via email at sara.hildebrandtgaspar@austinisd.org no later than December 11, 2020 by 5:00PM CST. Failure to follow above stated protocol may result in disqualification from procurement process.

  In the e-mail subject line, type: *Questions 21RFP061, Planning Partner for Facilities Master Plan*

- Q & A and all Addenda will be posted on our website: www.austinisd.org/cp/bids

- **Please read the instructions regarding the virtual pre-proposal conference and electronic submissions on the following page.**

- **VIRTUAL PRE-PROPOSAL CONFERENCE:**

  AISD Procurement will be hosting a virtual pre-proposal conference on December 8, 2020 at 10:00AM CST via Zoom. To join this meeting, click the link below or copy and paste into your browser, and follow the instructions from Zoom using the meeting ID and password provided:

  Join Zoom Meeting
  https://us02web.zoom.us/j/82718229771?pwd=VzN3d1ROcHpjdkVoUzVocUZBZzRHUT09

  Meeting ID: 827 1822 9771
  Passcode: 21RFP061

- **ELECTRONIC SUBMISSION:**

  Due to COVID-19 precautions and to prevent the spread of COVID-19, and in an effort to provide ongoing support and services for Austin ISD, the District has decided to accept proposals for 21RFP061 via email to sara.hildebrandtgaspar@austinisd.org no later than January 5, 2021 at 3:00PM CST. To ensure a fair and transparent process, all Proposals submitted via email will not be opened until AFTER January 5, 2021 at 3:00PM CST. To assist ensure a fair and transparent process, Vendors **must** place the following information in the subject line of the email containing their submission: **"21RFP061 Submission – CONFIDENTIAL"**

  Proposals submitted via email should not exceed 20MB. If you believe your attachment is more than 20MB, please zip the file or separate it into two (2) attachments.

  Proposals submitted via email must still be signed and all forms acknowledged and submitted with emailed response.

- **VIRTUAL BID OPENING:**

  AISD Procurement will be hosting a virtual bid opening on January 5, 2021 at 3:00PM CST via Zoom. To join this meeting, click the link below or copy and paste into your browser, and follow the instructions from Zoom using the meeting ID and password provided:

  Join Zoom Meeting
  https://us02web.zoom.us/j/84558401040?pwd=emNMcEJGcTR1bFAycUJLQTBvaWo3dz09

  Meeting ID: 845 5840 1040
  Passcode: 21RFP061

- If you have any questions about the virtual and electronic measures implemented as a precaution to COVID-19, please submit them in writing to sara.hildebrandtgaspar@austinisd.org following the Question and Answer Protocol outlined above.

Checklist and Submission Guidelines

This checklist is provided to help you conform to all form/document requirements stipulated in this solicitation and attached herein.
(This is not a required form, it is not necessary to return this checklist with your proposal.)

Understanding the Proposal

Completed

- ☐ Read entire RFP document, appendices and attachments
- ☐ Review AISD Policy and Provisions on our website: Policy and Provisions
- ☐ Attend pre-proposal conference
- ☐ Submit questions properly before deadline
- ☐ Review addenda, Q&A and other additional attachments
- ☐ Review Proposal Format section of RFP

Forms

Completed | Required

- ☐ | ☑ Bid Certification
- ☐ | ☑ Notification of Criminal History of Contractor
- ☐ | ☑ Debarment, Suspension and Ineligibility Certification
- ☐ | ☑ Conflict of Interest Questionnaire (CIQ) – electronic
- ☐ | ☑ Printed and Signed addenda cover sheets
- ☐ | ☑ Required HUB Forms
- ☐ | ☐ Strategic Partner Profile
- ☐ | ☐ EDGAR Vendor Certification
- ☐ | ☐ Software Vendor Certification Form

Submitting the Proposal

Completed

- ☐ Prepare the proposal in the format specified and sign all required forms, including addenda cover sheets
- ☐ Submit required digital copy via virtual submission requirements.
- ☐ Required HUB forms may be submitted with your proposal, or up to 24 hours after the due date at proconteam@austinisd.org

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Introduction

The Austin Independent School District (hereinafter referred to as "AISD" or the "District") is seeking proposals from firms qualified and experienced in developing long-range facilities master plans for K-12 school districts. The planning services shall include an update to the 2019 Facilities Master Plan (FMP) that supports the district's strategic plan and academic vision. The FMP shall include goals and strategies to address equity in facilities (alignment with current Educational Specifications, through community participation); overcrowding and under-enrollment; environmental sustainability; health, safety and security; academics and co-curricular supports; and protection of investments. The update shall include recommendations for the modernization of all district facilities (including schools, administrative, athletics and other support facilities) within the context of a 20- to 25-year timeline. Additionally, fact sheets for each facility shall be developed that provides a summary of student demographics, enrollment and population data, facility condition and educational assessment scores, and other relevant information. The FMP shall also include high-level recommendations for potential boundary changes.

The FMP Update will serve as a guide to ensure that future decisions for facility and bond planning are aligned with District priorities and reflect community input. AISD is committed to providing every child in the District with a high quality, well-rounded education that meets the needs of the whole child.

Background

The Austin Independent School District is a diverse, urban public school district located in Travis County in Central Texas. Austin ISD covers 230 square miles, serves approximately 75,000 students (a decrease of ~7% from the 2019-20 school year) and employs approximately 10,600 staff. The district has 113 facilities (that house 128 school programs), including 79 elementary, 18 middle, and 13 high school campuses, as well as 3 specialty campuses. In addition, the district has 16 non-school facilities.

The Board of Trustees adopted the 2017 Facilities Master Plan on April 3, 2017, which provided a path toward the transformation of AISD's schools to modern learning environments and hubs for the communities they serve. It emphasized a shift away from the traditional classroom configuration to incorporate flexible space that allows for collaborative, interdisciplinary, and project-driven learning. The FMP guides the development of future capital improvements and supports planning for future bond elections.

On November 7, 2017, a majority, 72 percent, of Austin voters passed the district's bond proposal for $1,050,984,000 to create 21st-century learning spaces for all students. Key projects in the bond include:

- Construction of nineteen (19) new or modernized campus facilities;
- Improvements to address overcrowding and critical needs; and
- District-wide improvements to technology for students and teachers, and transportation needs.

In 2019, the district embarked on the School Changes plan to reimagine how our schools could be used to benefit students and communities, reinvesting resources to bring the district's vision into reality and reinventing how students are educated in Austin ISD. This plan resulted in several district-wide initiatives to improve academic excellence, cultural proficiency and inclusiveness, expand before- and after-school hours, and provide strategic staffing of highly effective teachers. Additionally, four (4) elementary school closures were approved by the Board (three effective school year 2020-21, and one effective school year 2021-22) to better leverage resources and address under-enrollment at three of the four schools.
Reference: https://www.austinisd.org/schoolchanges

In January 2020, the Board approved an update to the 2017 FMP, referred to as the 2019 FMP, which includes a new vision for Athletics/Wellness, Fine Arts/Creative Learning, and Career and Technical Education/ Career-connected Learning that will:

- provide access to program offerings for all learners through on- or off-site instruction to address equity across the district ;
- identify cross-curriculum opportunities across all three disciplines;
- promote strong relationships with local partners; and
- improve the overall student experience through the design and planning of flexible and adaptable spaces.

The 2019 FMP is viewable at: https://www.austinisd.org/fmp

Historically Underutilized Business (HUB) Program Requirement

The Austin Independent School District (AISD) HUB Program promotes and strongly encourages the involvement and participation of Historically Underutilized Businesses (HUB) in District-wide procurements. The District encourages the use of certified firms on all procurements whenever possible. When AISD considers entering into a contract estimated at $50,000 or more, the HUB Program will determine whether subcontracting opportunities are probable before publishing the solicitation.

Statement of Probability: The AISD HUB Program has determined that subcontracting opportunities are probable in connection with this solicitation. The established goal for this solicitation is 22% for minority-owned or women-owned business enterprises (MBE/WBE) HUB participation based on the current availability of qualified MBEs and WBEs. HUB subcontracting opportunities have been identified in, but not limited to the following trades: (a) Urban Planning and (b) Public Relations.

Therefore, all proposers are required to follow the HUB Compliance Guidelines included in this solicitation and complete the Statement of Responsibility (SOR), HUB Utilization Report – HUR (HUBATT 1) and Compliance Checklist (HUBATT 1A). Questions regarding HUB forms should be directed to Melfi Penn by email at melfi.penn@austinisd.org.

The HUR (HUBATT 1) shall become a provision of the Contract between the awarded Proposer and AISD. The awarded Proposer can only change the HUR if (a) the Proposer complies with the guidelines for a Request for Change; (b) the Proposer provides its changes to AISD for review; and (c) The HUB Program Director approves the proposed changes to its HUR in writing.

Required HUB forms may be turned in up to 24 hours after the RFP due date. Please submit them with your proposal, or send them to proconteam@austinisd.org by January 6, 2021 before 3:00PM CST.

Term

The term length of the contract shall be upon completion of the Facilities Master Plan. The FMP shall be completed with sufficient time to prepare for the next bond election, potentially either May 2022, or November 2022.

Scope of Service and Performance Requirements

1. Design a planning process, utilizing the overarching principles of Equity by Design,

in coordination with AISD, that can be flexible to achieve a potential May 2022, or November 2022 bond election. This would result in a Board-approved FMP approximately eight (8) months prior to a bond election.
Reference - AISD Equity Resources and Tools:
https://www.austinisd.org/equityoffice/resources

Note: Bond elections must be called by the Board of Trustees.

2. Develop and implement a communications and engagement plan for multiple stakeholders including parents, students, district staff, interest groups, the general public, and Austin's diverse ethnic, immigrant, and refugee communities.
   a. Produce print and web-accessible materials that effectively and visually communicate the goals, strategies and other elements of the planning process (data visualization)
   b. Assist with coordination of and participate in community events
   c. Collect, assess, and record community input
   d. Adhere to deadlines for AISD translation of materials

3. Participate in district facilitated equity, and/or cultural proficiency and inclusiveness training, approximately a full day training.

4. Analyze and synthesize data including, but not limited to:
   a. School district history related to inequities
   b. 2019 School Changes documents
   c. 2019 FMP
   d. Strategic Plan
   e. Campus concept plans
   f. Academic programs (distribution and types)
   g. Student enrollment (school attending) and population (school assigned by residence)
   h. Student demographics (race/ethnicity, socio-economic and special education identification, etc.)
   i. Utilization of schools
   j. Facility condition assessments (FCA)
   k. Educational suitability assessments (ESA)
   l. Attendance area boundaries

Note: The firm will be using existing data sets, whether supplied by AISD or other consultants, and is not responsible for developing any of the data sets listed.

5. Identify school consolidation opportunities and school closure sites, if warranted to address the Board-approved optimal utilization guiding principle.

6. Collaborate with the district's Facilities and Bond Planning Advisory Committee (FABPAC), or a similar advisory committee, on the development of the Facilities Master Plan. The FABPAC is a Board-appointed citizen's advisory committee charged with evaluating capital improvements needs of the district and providing recommendations to the Board of Trustees on long-range facilities planning, amendments to the Facilities Master Plan, and the scope and timing of future bond programs.

7. Provide resources and information on emerging trends in:
   a. Facility design (including renovations and new construction)

b. Technology
c. Sustainability, energy and water efficiency, and maintenance
d. Other subject matters, as appropriate

8. Produce Facilities Master Plan document to include at a minimum:
   a. Goals and strategies to address equity in facilities (alignment with current Educational Specifications, through community participation); overcrowding and under-enrollment; environmental sustainability; health, safety and security; academics and co-curricular supports; and protection of investments.
   b. A prioritized, phased long-range facility modernization/improvement roadmap/timeline for future bond programs. The timeline shall include recommendations for all district-owned facilities, including schools, administrative, athletics, and other support facilities.
      Note: Bond planning is not within the scope of this RFP.
   c. Fact sheets for each facility shall be developed that provides a summary of student demographics, enrollment and population data, facility condition and educational assessment scores, and other relevant information.
   d. High-level recommendations for potential boundary changes.
      Note: Detailed boundary planning is not within the scope of this RFP, and will occur through a separate process.
   e. Document must be created for both print and web formats. Document must be compliant with W3C WAI's Web Content Accessibility Guidelines 2.1/2.0, Level AA conformance, for website use.
      Reference: https://www.austinisd.org/accessibility
   f. All native files shall become property of the district

9. Present, in coordination with district staff, progress reports and draft proposals to district leadership and the Board of Trustees at key points during the planning and approval process.

Planning Management Team Requirements

The firm shall provide a fully dedicated Planning Management Team, with a designated Planning Manager during the entirety of the project. Membership of this team shall be stable, and any proposed changes in the personnel must be approved in advance by the district representatives. The team shall be composed of a sufficient number of consultants, with all the necessary skill set sets required, to accomplish the scope of work described in the RFP.

The Planning Manager shall, as directed by the District Representative, make presentations to the Board of Trustees, FABPAC (Facilities and Bond Planning Advisory Committee) and other groups. These groups may include school community representatives, student groups, parent-teacher organizations, neighborhood associations, governmental entities, employee organizations, the faith community, the business community and the public at large.

If the firm does not have experience working in the Austin area, and/or does not have team members that specialize in communications and community engagement, the District recommends the firm consider finding local partners to assist with this portion of the scope of work. The District Representative shall approve the process for communicating with the public and the information that is to be made available to the public before it is disseminated.

AISD shall have the right to replace the firm, thus terminating the contract, or request that any member of the Planning Management Team, including subcontractors, be replaced.

Other Services

AISD may request that the firm perform additional services related to the subject of this RFP. The services, fees and other terms will be in a mutually agreed additional services amendment to the initial contract.

Proposal Format

A. Preface

The firm shall provide an Executive Summary of one (1) page or less, which gives in brief, concise terms, a summation of the RFP.

B. Proposal

The vendor's submittal itself shall be organized in the following format and informational sequence:

Section I – Qualifications, Experience and Personnel

1. Firm's name, business address, type of business organization (individual, partnership, corporation, association, etc.).

2. State whether the proposer is a national, regional, or local entity.

3. Number of years the firm has been in business.

4. A statement indicating assurances of continuity of services for the period of performance through August 31, 2022 shall be provided,

5. Identify the person authorized to negotiate for the proposer and provide contact phone

number and email address.

6. Information on prior experience, and previous or present contractual relationships with AISD.

7. A statement concerning the independence of the proposer, including direct and indirect financial interest, and the relationship of key members of the project team to employees of the District and any of the members of the Board of Trustees.

8. Provide the names and resumes for all principals and employees the firm anticipates serving on the Planning Management Team. The resumes must include, but are not limited to:
    a. Experience related to the specific services the person is to provide AISD (describe the activities, provide project lists, and total years and months of such experience);
    b. Area(s) of expertise, licenses, accreditations/certifications, and;
    c. Other information the proposer deems appropriate.

    Limit each resume to no more than 2 pages.

9. List any subcontractors that you anticipate using. Provide the following:
    a. The subcontractor(s) firm background information, including name, address, type of organizations, and number years in business;
    b. A brief history of the subcontractor(s) firm, including record of growth, type of work, areas of specificities (limit to one page);
    c. If a subcontractor will be playing a substantial role in the project, provide the resumes of the subcontractor's employees anticipated to work on the project. Resumes should be similar to the ones described for employees. Label the resumes with the subcontractor's name.

10. Describe one to three K-12 facility master planning projects that the firm has conducted, of similar size and scope, over the last eight (8) years. The description should include:
    a. Client and location of the project;
    b. Client contact person, phone number and email address;
    c. Beginning and ending dates of the services;
    d. Size of the school district in terms of enrollment and the number of facilities involved;
    e. Description of the scope of work, including process and outcomes (limit to one page);
    f. Explanation of project challenges, successes or shortfalls (limit to one-half page).

11. Other information deemed appropriate by the proposer (limit to one page).

Section II – Proposed Plan

A description of services and capabilities as outlined in the Scope of Service and Performance Requirements sections of this RFP. Clearly state any exceptions taken to the specifications of this RFP, or any conditions of the proposal. The Proposed Plan shall include the following:

1. Describe how the proposer plans to undertake the scope of work (limit to four pages).

2. Describe the level of assistance that will be expected from District personnel and the consultant availability (limit to one-half page).

3. Propose a timeline for each bond election scenario to complete the scope of work (limit to two pages total)

4. Other information deemed appropriate by the proposer (limit to one page).

Section III - Financial Proposal

This section shall contain a straightforward, concise delineation of the Proposer's fees to satisfy the requirements of this RFP. It is the vendor's responsibility to specify all costs (i.e. administrative fees, processing fees, etc.) associated with providing the products or services required herein. Provide a schedule of rates for all team members, and billing cycles.

Section IV – References

References are to be from government agencies and/or firms, which are substantially serviced by the vendor (references most similar to Austin ISD should be provided). Each reference must contain the reference's name, address, telephone number, and point of contact (including email address). Provide a reference for each of the K-12 facility master planning projects that the firm has conducted.

C. Required Forms

Proposer shall execute the following required forms (located at the end of this solicitation, and return the **signed** with the proposal *(digital signatures are accepted).* All forms are available for download on the AISD Contract and Procurement website at https://www.austinisd.org/cp/forms .

1. Bid Certification
2. Notification of Criminal History of Contractor
3. Debarment, Suspension and Ineligibility Certification
4. Conflict of Interest Questionnaire (CIQ) - electronic
5. W-9
6. Printed and signed addenda cover sheets

Competitive Selection / Evaluation

A. This is a **NEGOTIATED** procurement and as such, award will not necessarily be made to the offer or submitting the lowest priced proposal. Awards will be made to the firm submitting the best responsive proposal satisfying AISD's requirements, price and other factors considered.

B. This is a two-part evaluation. **Phase I** will evaluate each Contractor's proposal in the areas of the proposed plan, experience/service capabilities, and best value with the following criteria to determine the finalists who will be asked to participate in an interview. Phase I evaluation criteria is as follows:

50 Percent	Qualifications, Experience, Personnel and References	The demonstrated ability of the Contractor to provide services; the vendor's past relationship with the District.
40 Percent	Proposed Plan	The adequacy and completeness of the plan offered addressing the Scope of Service and Performance Requirements.
10 Percent	Financial Proposal	Rate schedule for all team members.

C. **Phase II** will evaluate the selected finalists in the areas of the proposed plan, experience/service capabilities, and best value on the following criteria:

35 Percent	Phase 1	The Proposed Plan, Contractor's Capabilities, Proposed Products, Financial Proposal. *(score from Phase I)*
65 Percent	Oral Presentation /Interview	The extent to which the goods or services meet the District's needs.

Upon completion of oral presentations or discussions, Contractors may be requested to revise any or all portions of their proposals.