

I. Purpose

[The growth in facilities’ backlogs is a critical issue facing school districts across the country.] [The district does not have a clear and current understanding of the conditions of facilities.] [The Facilities department has limited resources to allocate towards facilities.] As a result, the District seeks to partner with a firm who is able to assist the District to assess the facilities currently in its portfolio, develop a prioritized capital plan and provide benchmarks with data from other similar entities to support current and future capital funding decision making.

Specifically, the contracted services will include:

- A strategic assessment of the condition of district assets to include repair, modernization, and potential new space needs.
- Segmentation and sequencing of the facilities backlog based on both technical and program needs within the district.
- Development of scenarios based on various funding levels and reinvestment.
- Strategies for slowing the rate of backlog accumulation moving forward.

II. General Scope of Work

Project List Development

The firm will assemble a list of facilities deficiencies, repair and modernization needs.

1. The firm will be fully responsible for the review and consolidation of information from existing drawings, reports, and evaluations to be included in the analysis.
2. Facilities professionals will subsequently conduct a visual inspection of all identified components within the following major categories. Subcategories within should be suggested within the RFP response.

• Compliance	• HVAC	• Primary Heating
• Electrical	• Interior Shell	• Plumbing
• Exterior Shell	• Mechanical	
• Grounds	• Primary Cooling	
3. Interviews and working sessions with key facilities personnel.

Analysis

The selected firm will provide a comprehensive analysis and presentation of facilities’ conditions and needs spanning repair, modernization and potential new space needs. The analysis will detail the project list by building, system and other relevant segmentations in a format that is accessible to district leadership. A root cause analysis highlighting historical investment and deferral patterns should be used to identify ways the district can prevent additional deferral in the future. Where possible, benchmarking among other districts to provide comparative context, needs and historical facilities investments should be used to make a compelling case.

Capital Plan

Once the project list is finalized, the firm will create a capital plan that uses financial strategies that enable mitigation of deferred maintenance and modernization of district facilities. The firm will have a proven methodology for prioritizing capital projects and developing realistic funding scenarios. These options will tie to current facilities' needs, future program requirements and historical investment profiles.

Tracking and Updates

The firm should propose a recurring service option to track progress toward stated objectives as well as updating the project inventory.

III. Firm Qualifications

The following key qualifications of the firm are desirable for successful completion of the technical requirements:

1. The strategic assessment of educational facilities and operations must be a core business of the selected firm.
2. Contractor must have performed capital planning exercises at over 150 educational institutions and school districts of varying type.
3. Firm must have an existing database of comparable facilities metrics for benchmarking facilities' conditions and funding levels for purposes of capital planning. This database should include metrics for a minimum of 150 educational institutions and school districts.
4. The firm must have demonstrated ability to effectively present findings to district-level senior leadership/governing boards/state legislature.

IV. Submission Requirements

Responses to this RFP should include the following sections and contents:

- **Background:** Provide a brief background of the organization containing history and primary markets served.
- **Experience:** A summary of relevant experience including a full list of entities where a similar Scope of Work has been performed within the last five years with three applicable case studies, including references.
- **Project Team:** Submit a proposed project team including executive leadership, project management and data collection staff. Please note that licensed engineers are not required, but each participant should be experienced in work similar to that requested.
- **Scope of Work:** A detailed description of the firm's approach to the suggested Scope of Work above. Specific mention should be made of the firm's project classification, organization/segmentation of backlog and project selection processes.
- **Deliverables:** Provide sample deliverables to highlight both the organization's technical skills as well as the ability to deliver an effective presentation that will engage trustee level audiences.
- **Fees:** List proposed fee for suggested Scope of Work as well as optional annual updates.

V. Timeline

Activity	Due Date	Due Time
RFP Release		
RFP Questions Due		
Questions Responded		
Bid Responses Due		
Anticipated Date of Award		
Anticipated Date of Work Start		

VI. Evaluation Matrix

Background 15
Experience 20
Team 15
Approach 25
Fee 25
Total 100