

REQUEST FOR PROPOSAL

EDUCATIONAL PLANNING/ARCHITECTURAL FACILITIES STUDY

SHOREWOOD SCHOOL DISTRICT

Request

The Shorewood School District is soliciting proposals from selected firms for a comprehensive facility study of buildings throughout the district in conjunction with a long range facility plan. The study will include two elementary buildings, the middle school and high school buildings, and several auxiliary buildings within the district. The goal of the Shorewood School District is to use the findings and report from this study to develop a long range facility use plan which will help the district maintain the highest quality services to the community it serves.

Shorewood School District Background

The Shorewood School District includes four buildings: two (2) elementary schools (K-6), one (1) intermediate school (7-8), and one (1) high school (9-12). The high school is known for its unique, four building layout, much like that of a college campus. Auxiliary buildings also include a powerhouse for the high school campus and a community fitness center that is managed by the school district for the community. There are approximately 2,000 students and approximately 275 employees in the district. The 2013-14 general fund budget is approximately \$21.4 million.

Shorewood School District Vision Regarding an Educational Planning/Architectural Facilities Study

The Shorewood School District desires a comprehensive study, report and recommendations to assess and evaluate our current facilities. The Shorewood School District schools are unique buildings with architectural features that the community connects with and desires to preserve. Preserving the architecture of our buildings while providing for the highest quality, 21st century education, **enhanced functionality, and energy efficiencies**, presents challenges to the district as they manage facilities. It is the vision of the district that this study will be the first step in addressing these challenges and the financial implications that are associated with the maintenance of such historical buildings.

Additionally, a second key component to this study would be an enrollment study. This is a key component to this study as we plan not only the maintenance of the district facilities, but also the use of the facilities. The district vision of this study is for this study to provide recommendations regarding future enrollment trends, grade configurations, enrollment boundaries and facility space use for educational programs.

Finally, in addition to the educational programs within the district, Shorewood School District facilities are highly utilized by the recreational **programs** within the district. These programs make use of all district facilities and are an important component of the service provided to the residents of Shorewood. As part of the vision for this study, we are looking for recommendations on the spaces currently utilized by the recreational programs and any changes that would allow the district to better serve the community of Shorewood.

The district expects that in all recommendations, collaborative study, energy efficiency, and functionality will be addressed in all recommendations.

The Shorewood School District's initial vision of the scope of work includes:

- A. Architect/Educational planner will coordinate and direct an existing facility review. The Architects team will conduct on-site visits to each school building with the Buildings & Grounds Supervisor to access the general condition of existing facilities and life cycle of systems and equipment. The report will include a detailed description of the condition of the facility and note issues and concerns **with regards to energy efficiencies and functionality of space.**

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- B. Architect/Educational planner, after meeting with building principals and administration and understanding the utilization of the school building, provide a report identifying the educational spaces and appropriate usage and capacity with regards to the current and projected enrollment, **energy efficiencies and functionality of space.**
- C. **Architect/Educational planner will study the current layout of the district offices; make recommendations related to a redesigned district office with a focus on collaboration, energy efficiency, and functionality.**
- D. **Architect/Educational planner will assist the district in the development of a long-range maintenance schedule for the district facilities that will allow the district to budget for such maintenance.**
- E. Architect/Educational Planner shall include a description of the educational support spaces (food service, maintenance and operations, technology, recreational programs, general office spaces, district office administration and staff spaces, etc.) Design standards provided by the Architect/Educational planner will be included.
- F. The District will assign district staff and community members for input and direction to the Architect/Educational planner.
- G. The District will provide background information, current long range planning recommendations, and blueprints to the extent possible.
- H. Architect/Educational planner shall develop both a detailed and summary project documents including a project budget for issues and concerns.
- I. Present evaluation within report format that includes the process and documents of the educational planner scope of work.

Please respond to each of the following sections and sub-sections, referencing each section and sub-section by number:

1.0 Required Information About Firm

The following information must be included in the proposal:

- 1.1 Provide an overview of the firm. Include information regarding history, philosophy, services, practices and future vision.
- 1.2 List similar Wisconsin school district engagements with student populations of 1,500-3,500. Specifically, list the school district, engagement dates, student population, services provided and contact information.
- 1.3 List similar non-school district engagements. Specifically, list the entity, engagement dates, services provided and contact information.
- 1.4 List other entities that are willing to serve as reference checks and will discuss the services provided.
- 1.5 Has your firm ever been named in a lawsuit? How many times within the last ten years? What were these suits claiming and what is the status or outcome of these suits? (This question is looking for general background information and not specific confidential details of pending or settled legal disputes.)

2.0 Study, Analysis, Report and Recommendations

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The District requires a comprehensive study, analysis, report and recommendations. We believe that a comprehensive report including recommendations will be most directly correlated to successful decision making and increasing the efficiency and effectiveness of operations. As a result, the following information must be included in the proposal:

- 2.1 Provide detailed information regarding the process that will be used to conduct the studies including a detailed timeline.
- 2.2 Define the specific steps you will take to gather the information necessary to perform the study and make recommendations.
- 2.3 Include any forms or other tools that will be used throughout the study process.
- 2.4 Give examples of the other entities, both private and public, that will be used for comparison in the study and recommendations.
- 2.5 Define the time commitment of District staff members during interviews, data gathering, etc. in each segment of the process.
- 2.6 Define your final product and how the report and recommendations will be shared with the senior leadership of the District.
- 2.7 Include the assigned project manager, other project personnel and note their qualifications and experience with similar studies.
- 2.8 Include the cost for the studies (to be one all-inclusive estimated cost) and other relevant details.
- 2.9 Provide a sample report the District can expect to receive for the study of the Shorewood School District facilities.

Anticipated Timeline

While the study timeline will be negotiated with the successful firm, the District has an ideal preliminary goal of receiving final comprehensive reports **by November 15, 2014**. Please provide a proposed timeline, including dated benchmarks, with detailed information on each benchmark.

Evaluation of Proposals

The selection of a firm will not be based on price alone. All segments of this RFP will be weighted and evaluated. The proposal forwarded by the firm will be considered to be comprehensive and inclusive of all costs.

The following criteria have been identified for evaluation purposes (no prioritization):

- Proposed cost
- Proposed timeline
- Proposed process
- Involvement of District staff
- Comprehensiveness of final report and recommendations
- Prior client satisfaction
- Prior completed studies
- History of company

The proposal evaluation team will use all data gathered throughout the process. This includes the proposal, discussions with firms, and other reference checks. The team is interested not only in “what” the report will state, but also “how” the report and recommendations were arrived at.

Once the proposals are received, the firms the evaluation team feels most closely fit the District’s needs will be required to attend an on-site meeting to discuss their process and proposal. This meeting will be a chance for District leadership and Board and committee members to ask questions and explore the process, timeline and final product being proposed.

Once a successful firm has been selected, the District will further negotiate on study timelines, study plans and processes and the District may authorize changes in specifications or substitutions as appropriate. The District Administrator shall make the final recommendation to the Board of Education whose decision is final.

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Please submit three (3) original proposals and one (1) pdf file of the entire proposal (for reproduction purposes) to the address below:

Patrick L. Miller
Director of Business Services
Shorewood School District
1701 East Capitol Drive
Shorewood, WI 53211

Proposals should be marked "Educational Planning/Architectural Facilities Study" and are due in the Business Office no later than **2:00 p.m. (Central Time), Wednesday, August 27, 2014**. The Director of Business Services will contact each vendor to communicate results of the process.

Proposals and meetings are to be prepared and conducted at no cost to the Shorewood School District.

The Shorewood School District reserves the right to reject any or all proposals or any part of each proposal and to waive any minor informality in proposals or to waive any irregularities which may be to the advantage of the District.

If there are any questions or additional information needed, please feel free to email Mr. Miller at pmiller@shorewood.k12.wi.us. Any additional information requested will be shared with all firms participating in this RFP process.