



**Manor ISD**

**Facilities Assessment & Planning  
Scope of Work  
&  
Proposal**

**January 2024**



## Planning Approach for Manor ISD

Comprehensive facility planning is an iterative process essential to maintaining the short and long-term well-being of a District's infrastructure. There is no 'boiler plate' approach to planning as every school district has a unique set of characteristics that set it apart from others. However, there are commonalities in the types of data and information that should be used to make both fact based and community stakeholder-based decisions when the plan is developed.

We often use the analogy of a four-legged stool in which the seat represents the facilities and that seat is supported by four legs of equal importance. The legs include:

- Educational Framework: Curriculum, Programs, Delivery Models, and Policy
- Demographics: Enrollment and the data that impact enrollment
- Condition: Physical Condition and Educational Adequacy
- Funding: Ability to fund and sources of funding

Though one of the legs of the stool often necessitates the call for a plan, each of these legs carries an equal amount of importance when developing a facilities master plan. Add the element of community and stakeholder involvement that reflects the culture and values of the District and that sets the foundation for a successful planning process.

Phase 1 of the facilities planning process for Manor ISD will be focused on discovery and review of district portfolio and operational optimization. This phase will conduct a comprehensive data analysis of demographics and utilization, academic programs and curriculum, facility condition and adequacy, and financial analysis. Phase 2 is the Facilities Master Planning phase that includes significant effort to combine all data sources to create a comprehensive plan. The result of this phase will provide a 5 and 10-year facilities master plan, providing recommendations for future school improvement projects, maintenance prioritization, and phasing and scheduling.

HPM is partnered with Ameresco's Asset Management Group and In2 Architecture to bring subject matter expertise to specific phases of this process.

## PRE-PLANNING PHASE

### **Host the LRFP Kickoff Meeting / Plan for Planning**

Prior to beginning the planning process, our team will facilitate a work session with Manor ISD leadership to confirm the goal(s) of the process and work with leadership to ensure the process is aligned to meet the District's goals. Our team will review available data, and work with leadership to determine all other data needed to successfully complete the project. The initial planning meeting will:

- Ensure clear agreement on planning objectives and processes.
- Confirm project scope, sequence, and deliverables.
- Set timelines and duration of the project.



## **DATA GATHERING / ANALYSIS PHASE**

HPM will coordinate the collection and analysis of data that includes the facilities condition assessment, educational adequacy assessments, demographic and enrollment projections, and financial information.

### **Demographics / Enrollment Projections**

Understanding the details of student enrollment and the data that impacts the enrollment is critical to future space planning. Our team has extensive experience in not only development of enrollment projections but in the analysis of the details of the demographics of the district.

HPM will conduct the following demographic services:

1. Review and Verify existing enrollment projections
2. Conduct a housing student yield analysis and student potential analysis to determine how housing impacts enrollment trends
3. Create detailed mapping by school through Geographic information Systems (GIS)

### **Capacity & Utilization**

HPM will coordinate with Manor ISD to determine the best solution for determining a formula for both design and program capacity of each school facility in the District. From that we will determine the actual student utilization of each school facility.

HPM will conduct the following capacity and utilization services:

1. Coordinate with Manor ISD capacity formula
2. Utilize GIS to create a room-by-room utilization by school
3. Create a by-school and district wide capacity & utilization analysis and align to demographic projections

### **Educational Standards / Specifications Update**

The educational framework of a district is perhaps the key characteristic that makes all District's unique. During this phase of planning our team will review the newest school facility's educational specification update to current TEA Standards. Our approach will also review Trustee Policy and previous planning efforts that will provide, where possible, a consistent insight to program offerings and curriculum that would shape priority goals.

HPM will conduct the following services for Educational Standards/Specifications:

1. HPM will facilitate meetings with academic and curriculum leadership to determine current and future programmatic framework for Manor ISD. This will be a series of work-sessions that address all program areas and extra-curricular activities review of current and future delivery models that will shape future school renovations and new construction.
2. HPM will utilize these standards to create within *AssetPlanner* software, the collection tool for the Educational Adequacy Assessment.
3. HPM will create a summary by program for educational framework to be include into the State of the Schools Report

**DELIVERABLE:** Elementary, Middle and High School Educational Standards

### **Update District Construction Design Guidelines**

HPM will collaborate with Manor ISD Facilities leadership to review, update and complete District Construction Design Guidelines. These guidelines will provide construction by-system component standards for component replacement, modernization, and new construction projects. This scope will require several on-site and virtual sessions with Facilities to complete this task.

**DELIVERABLE:** District-Wide Construction Guidelines



### Physical Condition and Educational Adequacy

Our team has experience in conducting and evaluating facility condition and educational adequacy studies. This experience allows our team to easily extrapolate data from the recently completed facilities conditions assessment and incorporate it into the planning process. The condition and adequacy will be used as barometers for both action and disposition of each facility and for prioritization during the options and recommendations phases of the process. This condition report should include any data related to design and functional capacity of schools.

Conduct the following physical condition services:

1. HPM will sub-contract our national partner (Ameresco/AMG) to conduct a school-by-school component age and condition analysis
2. This survey will be entered into an **Asset Management** software to conduct future costs and predictive analytics for future capital and deferred maintenance investments
3. Create a deliverable that indicates each facilities facility condition index (FCI) (renovation vs. replacement standard) and projects future maintenance and capital costs for up to 30 years.

HPM will conduct the following Educational Adequacy services:

1. HPM will facilitate a programmatic work session following the educational standards process to determine adequacy standards for Manor ISD
2. HPM will conduct a field analysis of each school facility to determine and adequacy score and cost analysis for adequacy improvements

**DELIVERABLE:** Manor ISD will own all data that is collected by the Assessment teams. The data is stored into proprietary software that can either be purchased through an annual license agreement (not currently included in fee) or received outside the software platform in a micro-soft format deemed appropriate by Manor ISD.

HPM will also create a user-friendly dashboard that can be viewed by users as determined by Manor ISD.

### Create a State of the Schools Report

The Current State of the Schools Report clearly outlines trends in education impacting facility standards, comparing these trends to key District data and planning history.

#### State of the Schools Deliverable

1. Enrollment & Demographics
  - a. Enrollment Forecasts
  - b. Housing & Population Analysis
2. Facility Condition Assessment Data
  - a. Systems Condition Data
  - b. Educational Adequacy (if available)
  - c. Capacity & Utilization
3. Educational Profile
  - a. Grade Level Programs
  - b. School Profiles
  - c. Current & Future Initiatives
4. Financial Profile
  - a. Budget Summary
  - b. Capital/Maintenance Expenditures
  - c. Debt Capacity

This report serves as a key document that stakeholders can reference when providing feedback. All stakeholders will work from the same data and historical reference points, creating a strong, shared foundation for developing recommendations. Any modifications made to the District's Facilities data later in the process will become part of this report.



## **PHASE II**

### **PLANNING PHASE**

#### **Options Development**

Our Team will facilitate work sessions with the Manor ISD leadership to build a comprehensive prioritization matrix for project prioritization to develop options for Manor ISD portfolio optimization. Demographic, condition, educational programs information from the State of the Schools will be used as the foundation of options development.

HPM will conduct the following Options Development services:

1. Prepare preliminary options packet for internal work-session
2. Facilitate a two [2] day work session with internal district stakeholders to create facility options for a 10-year facility optimization and facility disposition plan
3. Produce options deliverable that will be presented to the Manor ISD Board of Trustees

Our team will work with Manor ISD to build tools of decision making that make best use of funding while having the greatest impact on student achievement. Our team for options will include Planning lead, Facilities Condition Lead, GIS analyst, and a Pre-construction cost estimating specialist.

#### **Use of Geographic Information Systems [GIS]**

A geographic information system [GIS] is a method for capturing, storing, analyzing, managing, and presenting data and associated attributes geographically. GIS can enhance an organization's decision-making process by providing efficient means to view and analyze data.

GIS services will include:

1. Mapping and analysis of demographic data
2. Space utilization mapping and analysis
3. Options analysis
4. Recommendations analysis

## **RECOMMENDATIONS PHASE**

#### **Recommendations Development**

After input and vetting our team will reconvene leadership to consider the options for a multi-day work sessions to narrow the list of facility options into a set of final recommendations.

HPM will conduct the following Recommendations services:

1. Prepare preliminary recommendations packet for internal work-session
2. Facilitate a two [2] day work session with internal district stakeholders to create facility recommendations for a 10-year facility optimization and facility disposition plan
3. Produce draft recommendations that will be presented to the Manor ISD Board of Trustees

Our team for options will include Planning lead, Condition Assessment Lead, GIS analyst, Program Development (scheduling specialist) and a Pre-construction cost estimating specialist.





### **Final Report and Recommendations**

Our team will present a final report and data visualization tool to the Superintendent and Board of Trustees upon completion of this process. The final report should include:

- Overview of the process
- Brief Summary of Data
- Recommended Actions by School
- Implementation Plan (that includes):
  - Portfolio Optimization profile
    - Boundary and Consolidation recommendations
  - Timeline & Phasing
  - Costs over the duration of implementation
  - Funding Strategies

### **Board Work Sessions / Updates**

The Board of Trustees will receive updates and have time for discussion on the process at key intervals during the process. While subject to revision based on District feedback, we recommend workshop settings throughout the project plus a final presentation session with the Board members.

This process should engage the Board of Trustees no less than on four [4] occasions during this process.



## ESTIMATED FEE

The following is an estimated fee based on the Scope of Work as described. This fee would be a lump sum fee and invoiced monthly. The estimated fee for this planning process will be \$497,500 including expenses.

### Fee Break Down:

#### MISD FACILITIES MASTER PLANNING SCOPE SUMMARY

PRE-PLANNING PHASE	COSTS
<b>Plan for Planning (Internal MISD Leadership)</b> HPM, Ameresco, and In2 Architects will meet with District staff to communicate scope, timeline, and deliverables. Significant preparation is required ahead of this meeting	\$ 10,000.00
<b>Demographic Analysis and Enrollment Projections</b> Review and Analyze Demographer's reports (Costs included in other tasks) Conduct a District student build-out analysis to determine 10-20 year future student potential in the Manor District boundaries Planning Demographic Analysis - Live-Attend, Student Migration, School-by-school mapping, Geographic Information Systems Mapping	\$ 35,000.00
<b>Educational Standards / Specifications Update</b> Utilize latest new school educational specifications and facilities lists to compare and update to TEA Standards for each grade level school. Meet with Academic and Program District level personnel to modify standards to MISD Specifications. Educational Framework Development Deliverable: ES, MS, and HS Updated Educational Standards, summary of current facility and campus profile information	\$ 62,500.00
<b>Educational Adequacy Assessment</b> Modify Space Planning module to meet MISD Educational Specifications Pilot Assessment of model school to determine final adequacy tool Two-Person Team Assessments of: 10 Elementary Schools (includes Early Childhood Learning and K8) 3 Middle Schools 4 High Schools (Includes Tech) Capacity Analysis- GIS floor plans with master schedules. Deliverable: Dashboard of Capacity, Educational Adequacy and Deficiency Cost Rep	\$ 60,000.00
<b>Design Manual (Technical Guidelines) Update</b> Meet with Facilities department to utilize current Technical Construction Guidelines and update to current and future District standards.	\$ 25,000.00
<b>Facilities Condition Assessment</b> Assessments include: Pre-meetings to establish assessment standards and costing standards; full MEP professional walk-through of each educational facility; all costs associated with software set up in Asset Planner. <b>Elementary School Assessments</b> Assumptions: Elementary schools are considered the base scope and carry the full cost of Master Planning support for the project as required. Assessment of 8 Elementary Schools, 1 PK-8, and 1 Early Childhood Center <b>Middle School Assessments</b> Assumptions: Comprehensive assessment to establish revised scopes and cost estimates. Assessment of 3 middle Schools Establish condition baselines for planning. <b>High School Assessments</b> Assumptions: Comprehensive assessment to establish condition baselines for planning. Assumes master planning support is accounted for in base scope Assessment of 4 High School Facilities (including Tech HS)  All costs associated with FCA include Software a one-time Software set up fee for Asset Planner and Project Planner. Access to Ascertainer Capital Planning Software is provided during the term of the assessments, pricing for subsequent years is provided as an additional alternate and is subject to escalation.	\$ 190,000.00
<b>State of the Schools Report</b> Deliverable: Summary documentation packet and Dashboard capabilities to be used as planning resource for BOE, Community and Planning Team	\$ 12,500.00
<b>Facilities Master Planning Dashboard</b> Create and maintain a facilities planning project dashboards for the duration of the project	\$ 7,500.00

## ESTIMATED FEE

PLANNING PHASE	COSTS
<b>District Internal Staff Meetings / Updates</b> Monthly Project Updates and Documentation/Data Review Sessions. Deliverable: Agenda, Meeting presentation, Meeting Notes (Up to 4 meetings)	\$ 10,000.00
<b>Previous Bond Promotional Video</b> HPM will script, film, and produce a Summary promotional video of the previous Bond Program for MISD. Deliverable: Promotional Video	N/C
<b>Facilities Master Planning Options Development</b> Facilitation of up to two [2] days on-site options development. Planning team will include planners, pre-construction professionals, program development specialists, FCA team, Architect Team, and District Staff. HPM will prepare documentation prior to meeting and coordinate meeting space in the District. Deliverable: Options Packet for BOE review and Community presentation	\$ 15,000.00
<b>Facilities Master Planning Recommendations Development</b> Facilitation of up to two (2) days on-site recommendations development. Planning HPM will prepare documentation prior to meeting and coordinate meeting space in the District. Deliverable: DRAFT facilities master plan packet for BOE review and Community presentation	\$ 20,000.00
<b>Board of Education Meetings / Updates</b> Present to BOE up to four [4] occurrences: Process Introduction/Educational Framework Review, Options Review, Recommendations Review, Final Presentation. Deliverables: Process Reports, Survey Results, BOE Summary presentations	\$ 10,000.00
PRE-PLANNING SUB-TOTAL	\$ 402,500.00
PLANNING SUB-TOTAL	\$ 55,000.00
EXPENSES & ADMINISTRATIVE COSTS	
TOTAL PROFESSIONAL SERVICES COST	\$ 457,500.00
TOAL EXPENSES	\$ 40,000.00
	\$ 497,500.00
<b>ADDITIONAL ALTERNATES</b>	
Asset Planner Capital Planning Software Annual Fee	\$ -
Project Planner Software Annual Fee	\$ -

Rates include Accounting/Invoicing Services, Admin Services, General Overhead





## ESTIMATED TIMELINE

It is estimated this phase of planning will be conducted from February 2024 through August 2024

Manor ISD Facility Condition Assessment & Planning Timeline	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24
<b>Pre-Planning Phase</b>								
Plan for Planning (Internal MISD Leadership)								
Demographic Analysis and Enrollment Projections								
Educational Standards / Specifications Update								
Design Manual (Technical Guidelines) Update								
Educational Adequacy Assessment								
Facilities Condition Assessment								
State of the Schools Report								
Facilities Master Planning Dashboard								
<b>Planning Phase</b>								
Facilities Master Planning Options Development								
Facilities Master Planning Recommendations Development								
Board Deliverable FMP								
<b>Ongoing Activities</b>								
District Internal Staff Meetings / Updates								
Board of Education Meetings / Updates								