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Memo

To Facilities Committee Board of Education

From Kyla Johnson-Trammell, Superintendent
Timothy White, Deputy Chief Facilities Planning and Management

Board Meeting Date January 11, 2019

Subject Review of Facilities Master Plan Request for Proposal

Action Review of Facilities Master Plan Request for Proposal

Background The District will need a Facilities Master Plan (FMP) to support a Bond Measure in March 2020

Discussion A Facilities Master Plan was started in 2016 to update the last FMP completed in 2012. The FMP preparation process was incorporated in the Blueprint for Quality Schools. The FMP was never completed. The current need for a comprehensive facilities database integrated with current data in development as the Citywide Plan requires a new contract with new criteria for format and platform support.

Fiscal Impact Remaining funding from the incomplete FMP will be used in support of the new services to be procured through this RFP process

Attachment Request for Proposals for Facilities Master Planning Services Including Strategic Facilities Optimization

OAKLAND UNIFIED SCHOOL DISTRICT

REQUEST FOR PROPOSALS FOR FACILITIES MASTER PLANNING SERVICES INCLUDING STRATEGIC FACILITIES OPTIMIZATION

The Oakland Unified School District is requesting proposals for Facilities Master Plan Services encompassing all District owned facilities (Early Childhood, K-12, Adult Ed, Administration, and Operations) to support scoping and prioritization of improvement projects supported by available capital funds. The District endeavors to improve utilization of our facilities and improve our operational efficiency while supporting community school and thriving students.

SCHEDULE

DATE	ACTIVITY
December 21, 2018	RFP Issued
January 7, 2019	Deadline to submit email requests for interpretation, correction or modification are due. Submit emails to: Tadashi.nakadegawa@ousd.org , and David.Colbert2@ousd.org
January 11, 2019	Deadline for District responses to requests for interpretation, correction or modification
January 16, 2019	Proposals Due by 2:00 p.m.
January 23-30, 2019	Interviews, if necessary
February 4, 2019	Notification to selected firm, if any, subject to Board approval
February 20, 2019	OUSD Board approved contract

GENERAL INSTRUCTIONS

Please submit one original signed proposal and three (3) hard copies of the Proposal Response. The proposal shall be made in the format provided and the complete proposal, together with any and all additional materials, shall be enclosed in a sealed envelope addressed and delivered no later than 2:00 p.m. on January 16, 2019 to:

Oakland Unified School District
Office of Facilities Planning and Management
Attn: Tadashi Nakadegawa, Director
955 High Street
Oakland, California 94601

The sealed envelope shall be marked on the outside lower left corner with the words "**Facilities Master Plan RFP.**" It is the Proposer's sole responsibility to ensure that their proposal is received prior to the scheduled closing time for receipt of proposals. No proposals will be accepted after the deadline of January 16, 2019. The District assumes no responsibility for non-receipt of submittal packages due to any delay including, but not limited to, carrier delay. It is the Proposer's responsibility to meet the deadline stated above. Proposals that do not contain the required number of copies and all of the information requested in this RFQ may be considered non-responsive and rejected without evaluation. Submittals received after the deadline or at the wrong location may be considered non-responsive. Fax or e-mail copies will not be accepted. All submittals become public records of the District and will not be returned.

This RFP does not commit the District to award a contract or pay any costs incurred in the preparation of a proposal responsive to this request. The District reserves the right to accept all or part of any proposal or to cancel in part or in its entirety this RFP. The District further reserves the right to accept the proposal that it considers to be in the best interest of the District.

All requirements must be addressed in your proposal. Non-responsive proposals will not be considered. All proposals, whether selected or rejected, shall become the property of the District. Firms are responsible for checking the website at <https://www.ousd.org/domain/39> periodically for any updates or revisions to the RFP.

Required Information

1. Company name, primary contact, address, telephone number, and e-mail address.
2. Identify who is authorized to sign agreements and represent your firm in matters related to this Request for Proposals.
3. Describe your firm in terms of number of years in business and experience with Facilities Master Planning and Strategic Facilities Utilization services similar to that contemplated in this RFQ.

4. Provide resumes of individuals currently assigned to work similar to that contemplated in this RFQ.
5. Describe briefly the services to be provided by your firm.
6. Describe how hiring your firm as Facilities Master Planners will improve the District's fiscal health and long term educational excellence.
7. Provide a clear and concise rationale as to why the District should select your firm over other qualified respondents.
8. Describe the qualifications, expertise, and experience of assigned personnel and how these relate to the scope of work identified in this RFP.
9. Name the partner or partners at your firm who will be providing such services, indicating the extent of their involvement in day-to-day activities.
10. Please provide a summary of your proposed fees by scope area and expenses and any assumptions used in deriving the total proposed fee.

The Facilities Master Plan will consist of the following elements:

- **Asset Management Strategy**
- **Assessment and Options**
- **Implementation Strategy**
- **Facilities Master Plan**

Proposer will review analysis and findings produced by OUSD (including projected enrollment and OUSD proposed facilities utilization), review relevant information from prior initiatives including Jacobs Facilities Planning Data, Blueprint for Quality Schools, MkThink 2012 FMP and 2014 Asset Management Plan to develop a Facilities Master Plan to support a bond in 2020.

Proposer will incorporate existing data on Facilities Conditions Index, in permanent and temporary buildings, Educational Adequacy, ADA, Seismic, Best Practices, Sustainability, and Conservation in the Facilities Master Plan

Proposer will support OUSD Research Assessment & Data (RAD) and Facilities departments in development of a comprehensive District-owned and operated facilities planning database and analysis tool, linked to site and floor plans for verification and usefulness.

Proposer will ensure that all District owned Facilities are included. Previous work excluded some Early Childhood Facilities (Child Development Centers), Adult Education and Central Administration and Operations Facilities.

Proposer will assist the District in developing a Facilities Capacity Model to establish a baseline Capacity for each Facility, Region and District. After this Model is developed

the proposer will produce a capacity report for each facility. This Facilities Capacity Report must be sufficiently detailed to support all decisions around utilization including opening or closing schools consolidation of programs on campuses and negotiations with charter operators.

Asset Management Strategy

Proposer understands that the District will determine the planned capacity of the District, number and best location for schools, and strategies for housing program partners and other providers.

Proposer will be provided strategic recommendations on the following (considering in each area existing conditions):

1. Where should the district locate central administrative personnel?
2. What revenue opportunities related to real property should the district consider in the short, medium, and long term?
3. What should the district do with property deemed as surplus?
4. What should the district's strategy be with regards to athletic fields and other recreation-serving assets to best balance support for District Athletic training and competition while supporting revenue generating community use?
5. What is the District's best strategy for prioritizing future Capital Improvements in support of OUSD goals?

Deliverables:

- Strategic schemes to house housing administrative personnel, developing revenue opportunities, addressing surplus property, and athletics and recreation
- Initiate and manage work with OUSD's preferred real estate advisor to develop property appraisals for properties deemed as potential surplus by OUSD

Assessment

Through the Facilities Master Plan Process, in addition to development of a prioritized proposed renovation and improvement project list, the district may identify certain properties as candidates for alternative use or disposition. Proposer will work with the District's preferred real estate advisor to provide appraisals of any additional properties that will serve as a basis for understanding value.

Proposer will provide input to the value discussion based on the following district data:

- OUSD's updated facilities/student/community database to support future scenario development for questions 1-5, including the Citywide Plan and supporting resources
- Surplus Property Scenarios including: Assessment, Revenue modeling for multiple scenarios
- Cost/benefit analysis of alternative approaches to housing district administration

Implementation Strategy

Proposer will work with the district to develop and refine specific, implementable strategies for solving the five assigned key asset management questions, while reviewing, evaluating and integrating OUSD's priorities:

- Develop scenarios with actionable strategies and implementation plans related to questions 1-5
- Analyze overall cost/benefit of scenarios for questions 1-5
- Develop communications program re: proposed solutions for questions 1-5
- Integrate OUSD strategies into an overall strategic framework to serve as the basis for a facilities master plan

Deliverables:

- Strategic Framework Presentation, including all asset management strategies
- Implementation Framework for asset management strategies

Facilities Master Plan

Proposer will produce a Facilities Master Plan that will serve as the foundation for a 2020 General Obligation Bond. Proposer will review the Jacobs, Blueprint and MKTHINK data to verify sufficient detail to support this work. Additional Architectural or Engineering services deemed required, must be quoted and included in the Fee Total

Deliverables:

- Facilities Master Plan with Executive Summary
- Asset Inventory
- Guiding Principles
- Planning Context
- Needs Assessment
- Quick Hits
- Prioritized list of recommended projects PROJECT-SPECIFIC INITIATIVES