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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 Request for Proposal for Independent Contractor Services-Facilitation & Project Management of 7-11 Process

Action Review of Request for Proposal for Independent Contractor Services-Facilitation & Project Management of 7-11 Process

Background The Citywide Plan will include recommendations for possible repurposing of select District Sites. A full consideration of all potential reuse options requires consideration by a 7-11 Committee

Discussion Facilitation and Project Management of the 7-11 Committee Process will provide a functional and useful outcome with clarity of options and recommendations for reuse of selected sites

Fiscal Impact New grant funding is anticipated to cover the cost of these services

Attachment Request for Proposal for Independent Contractor Services-Facilitation & Project Management of 7-11 Process

Oakland Unified School Request for Proposal Independent Contractor Services – Facilitation & Project Management of 7-11 Committee Process

RFP # _____ – Facilities

1. INTRODUCTION

The Oakland Unified School District (the "District" or "OUSD") is seeking proposals from qualified individuals or firms that are experienced in working with urban, public school districts in the "7-11 Committee" process relating to surplus property. The "7-11 Committee" is composed of 7 to 11 members as provided for by Education Code section 17389. It is an advisory committee to the Board of Education relating the reuse, repurposing and disposition of school buildings and vacant sites not needed for school purposes. Once established, the District's 7-11 Committee proceedings and its deliberations are open to the public.

The District seeks a facilitator who can convene the committee, prepare agenda materials, collaborate with District personnel for needed data, coordinate scheduling of speakers for 7-11 committee to provide necessary information to the committee, facilitate meetings to encourage divergent viewpoints, synthesize community information for the committee, prepare and present advisory recommendation to the Board, document engagement processes and outcomes, and project manage the overall process to meet desired timelines. Proposals should be submitted as requested below and should include all elements described under "Contents of Proposal" in Section 7.

The District anticipates the initial contract will be for the period from February 21, 2019 through June 30, 2019.

2. 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
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

3. 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, Executive Director
955 High Street
Oakland, California 94601

The sealed envelope shall be marked on the outside lower left corner with the words "**7-11 Committee Facilitator 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.

4. QUESTIONS ABOUT THE RFP

The Deadline to submit email requests for questions about the RFP is January 7, 2019. Emails should be submitted to tadashi.nakadegawa@ousd.org Specify "7-11 Committee Facilitator RFP" in the subject line.

No questions will be considered after close of business on January 7, 2019. Responses to all questions received will be posted on the District's website at <https://www.ousd.org/domain/39>. Proposers shall not contact any District employee or official regarding this proposal other than the individual listed above as the contact person. Contacting District staff or officials regarding this work may result in disqualification. No verbal comments made by District staff or officials are binding regarding this RFP except for that which is made in writing by the above mentioned contact person. This will assure that all proposers receive the same information in a timely manner.

5. BACKGROUND ON OUSD -- update to current info plus facilities info

The District has approximately 36,000 students enrolled in grades K-12, not including the students in charter schools. There are _____ students in Oakland public charter schools and ____ charter schools are in District owned facilities. The District currently operates 49 elementary schools, 13 middle schools serving grades 6-8, five elementary/middle schools serving grades K-8, seven comprehensive senior high schools serving grades 9-12, three middle/high schools serving grades 6-12, and nine alternate high school programs. 37 charter schools currently operate within the District's boundaries. The District employs approximately 4,457 full-time staff, including certificated (credentialed teaching), classified (non-teaching) and management. The District's fiscal year 2018-19 adopted budget revenue was \$585 million.

We encourage you to explore our website for more information about the District at: <http://www.ousd.org> and <http://www.fiscalvitality.org>.

6. SCOPE OF SERVICES & DELIVERABLES

The 7-11 Committee Facilitator will be expected to work closely with District officials to convene the 7-11 committee and additional stakeholder groups, large and small, to:

- Review the projected school enrollment and other data provided by the District to determine the amount of surplus space and real property;
- Establish a priority list of use of surplus space and real property that will be acceptable to the community;
- Cause to have circulated throughout the attendance area the priority list and provide for hearings of community input on acceptable uses, including sale or lease for child care development purposes per Education Code section 17458);
- Make a final determination of limits of tolerance of use; and
- Forward to the district governing board a report recommending uses of surplus space and real property (Ed. Code § 17390).

The qualifying Proposer will have experience and expertise in facilitation, preferably with deep knowledge of the Oakland community. Additional desirable skills include familiarity with Education Code requirements relating to public property; a demonstrated commitment to effective governance, accountability, transparency and openness; an understanding of the context of real property issues within the community; ability to analyze and convey data in a variety of ways; ability to engage stakeholders in a variety of ways; demonstrated skill of

synthesizing feedback and information into an advisory report, and demonstrated competence and comfort facilitating complex conversations about equity, public assets, community needs and preferences, and difficult choices.

The scope of work will include

- planning and coordinating 7-11 committee meetings and community hearings;
- preparing materials before and after various 7-11 committee meetings. (Materials will be developed in coordination with and approved by designated District staff, including agendas, discussion questions, data, PowerPoints, and others as requested.);
- coordinating with District staff to ensure 7-11 committee has access to needed data, information, and subject matter experts; the proposal should describe how, if requested, the Proposer would provide appraisal information about the potential properties to the 7-11 committee (i.e., subcontracted service at cost, subcontracted service at markup, in-house service, etc.)
- providing regular updates and synthesis of information from committee meetings to key District staff;
- preparing and presenting an advisory report to the District's Board of Education by June 26, 2019.

7. CONTENT OF PROPOSAL

Response Elements and Format

Your response to this RFQ should follow the format described below, in the order indicated. The RFQ should not exceed 12 pages. All applications should be in 12 point font, using at least 1.5 spacing.

A. Submittal Letter

Include the RFP's title and submittal due date, the name, address, fax number and telephone number of the responding firm. Include a contact person and corresponding e-mail address. The letter shall state that the proposal shall be valid for a 60-day period and that the staff proposed is available immediately to work on this project. The person authorized by the firm to negotiate a contract with the District shall sign the cover letter.

B. Organizational Experience

Please detail the experience and expertise that make you or your firm uniquely capable to implement the services sought through this RFQ. This section should provide an overview and history of your firm, and its experience in providing these types of facilitation and project management services to K-12 school districts.

1. Similar Project Experience

Please provide a description of three to five projects undertaken by you or your firm that demonstrate your ability to work with OUSD in the ways described in this RFQ. For each

project, include a description of the client/partner, an overview of the project, its duration, and a listing of project outcomes. If the organization was a school district or educational agency, please indicate that in your description. If it was another sort of organization, please describe how the experience might, nevertheless, be applicable to the qualifications you would need to partner with OUSD. Experience in diverse, urban, public schools, and school systems is preferable.

2. Key Team Members

Please identify key staff members on the project team. Describe each team member's relevant experience and describe the role he or she would play in the project. Please indicate who the primary contact will be and who will be responsible for the day to day work with the District. Conclude this section with a written assurance that the key individuals listed and identified will be performing the work and will not be substituted with other personnel or reassigned to another project without the District's prior approval. If you are applying as an individual, and you are the sole team member, please indicate so in this section. Resumes for each team member listed should be attached as an appendix to the application (this does not apply to page limits).

3. References

Please provide up to five references total for clients or organizations for whom you have performed similar work. Include the organization name, project title, and primary contact name, address, telephone number, and email.

4. Local, Small Local and Small Local Resident Business Enterprise Program

On January 29, 2014, OUSD adopted a resolution amending the 2008 Local, Small Local and Small Local Resident Business Enterprise Program (L/SL/SLRBE) and increasing the mandatory local participation requirement from twenty (20%) to fifty (50%) percent for all capital program/construction related contracts and professional services agreements. As with all OUSD projects, companies must be certified by the City of Oakland in order to earn credit toward meeting the participation requirement. The basic Local Business Utilization Policy requires that there is a mandatory fifty percent (50%) LBU participation with a 25% or less Local Business (LBE) participation and a 25% or more Small Local or Small Local Resident Business (SLBE/SLRBE) participation. The District has waived the Policy for this RFQ. However, the District expects each proposer to demonstrate support for the Policy by including in its Proposal some local business utilization.

C. Project Approach

Please describe the approach you would take to the Project including responding to the following questions:

- What is your approach to collaborative engagement and planning in general? Please describe how you would engage district stakeholders (including members of the 7-11 committee, District officials, community advocates and partners, teachers,

administrators and school personnel, families and students, and community members) around potential surplus property considerations.

- Describe how you believe the process of engagement around surplus property considerations could strengthen community and advance the District's vision.
- What are the major outcomes you would hope to accomplish in the initial engagement period up to June 2019 and thereafter?
- Describe what you anticipate would be the biggest challenges or barriers in this work, and how you would anticipate overcoming them.
- What are the biggest strengths that you think you would bring to OUSD as an implementation partner?

All proposals and responses must be clear, concise, complete, well organized and demonstrate both respondent's qualifications, and its ability to follow instructions. The quality of answers, not length of responses or visual exhibits is important in the proposal.

D. Specialized Skill or additional information

In this section, please include any specialized skill or additional information not previously covered that is relevant to this RFP for the consideration by the District.

E. Rate/ Fee Structure

Please describe you or your firm's rate/fee structure. Please list how you anticipate charging for work performed on the project. If you are a firm, please specify if there are variable rates for different team members listed in this application.

- If your proposal is based on an hourly or per diem basis, please describe how you will develop a Project budget. Please estimate a flat, all-inclusive fixed fee for February 21, 2019 to June 30, 2019 to achieve the deliverable of an advisory committee report to the Board. Please specify all assumptions included in the flat rate quote, including without limitation, number of engagements, number of staff person(s) working under the agreement, potential subcontractors, travel, materials, meeting refreshments, etc.
- Please also estimate a flat, all-inclusive fixed fee for FY 2019-20, on an as-needed basis for continuing engagements with the 7-11 committee to review any additional properties that may be potential surplus property.
- Please list services outside the scope of this RFP and the manner and rate in which such services would be billed.
- Please describe how, if requested by the District, you or your firm would bill property appraisal services.

Note: The District is interested in achieving fees that are both in line with the specific services provided the District and are comparable to those paid by other school districts on similar transactions.

8. SELECTION CRITERIA

The selection criteria will include, but not be limited to, the items listed below:

- Demonstrated understanding and responsiveness to the RFP, including Proposer's commitment and ability to provide each item outlined in the Scope of Services (Section 6) -- up to 20 points;
- Qualifications and experience of the firm and personnel named in the proposal in working in Oakland and building community trust – up to 30 points;
- Past successful experience in working with the Oakland Community and/or California school district, particularly in surplus property matters – up to 20 points;
- Demonstrated alignment with the District's mission, vision, and values – up to 10 points;
- References – up to 10 points;
- Feasibility and Reasonableness of Fees – up to 10 points

9. EVALUATION OF APPLICATIONS

Proposals will be reviewed by a multi-disciplinary team of District staff. Points will be assigned for each proposal as outlined above. The highest ranking proposals may be selected for an interview by a panel of individuals.

The District reserves the right to reject all proposals. No individual or firm shall have any legal or equitable right or obligation to enter into a contract or to perform services as a result of its proposal or the ranking of its proposal. Proposers will be notified after the Board awards a contract to a successful firm or individual.