

Key Considerations for the Development of a Long-Range Facilities Planning Services Request for Proposal

Choosing the right partner to assist your district with Long-Range Facilities Planning is crucial to the future success of your school district. Long-Range Facilities Plans take into account a district's **strategic plan**, including **desired enhancements to programmatic and service offerings**, and the **current state of repair of the buildings and grounds**. The end result can provide a roadmap for the community to maximize fiscal responsibility, mitigating the impact of aged buildings and systems and delivering learning environments that support student growth.

The foundation of this selection begins with a comprehensive **Request for Proposal (RFP)** that specifies district goals, needs, and timelines so that planning efforts, are responsive to your unique district. Below are considerations as you develop an RFP that will assist you in selecting the right partner.

DEFINE SCOPE AND TIMELINE

What is the **scope of the plan** that needs development? Have other third parties completed **reviews of parts of facilities or systems** recently that can be incorporated into a Long-Range Plan? Are there **phases** within the Long-Range Plan that should be defined or prioritized such as safety and security, enrollment changes, provisions for Americans with Disabilities (ADA) Act, or ensuring research based educational environments for students that allow for varied instructional delivery? **When** would you like the plan completed by? Are there **requirements** for consultants to be a part of any community engagement sessions or presentations to the school board on findings? Consider what other team members might also **be involved** with this planning process. Do they offer similar services that could affect the scope and fee of what you are seeking in this RFP? Spelling these kinds of requirements out at the onset of the RFP process ensures clarity for proposing firms and comparable responses for the district.

ON WHAT BASIS IS THE LONG-RANGE PLAN TO BE FORMED?

Our experience has shown that it is extremely helpful for districts to have recently completed, or be in the process of completing, **Strategic Planning**. While considering facility needs are a major component of good financial and operational planning by districts, having a compelling and agreed-upon rationale for future facilities usage is a large part of the formation of stakeholder support for the final Long-Range Plan.

OBJECTIVES:

Typically, school districts articulate what **objectives, or targets**, will be used to **evaluate proposals** from competing firms. This is often identified in the Evaluation and Selection process section of the RFP as well. Common examples include:

1. Demonstrated Long Range Facilities Plan expertise in school environments
2. Clear methodology in the planning process
3. Having expertise in educational trends and changing school learning environments
4. Organizational values that align to the mission of the district and ensuring future student success
5. Proven project management skills to effectively manage the project and associated timelines
6. Excellent communication and people skills for the team members working with the district
7. Cost effective proposal for the scope of work requested

Depending on the scope of the planning process and desire to engage community and board members, additional objectives for community engagement, facilitation skills, and communications support may also be added.

FEE STRUCTURE

The fee structure is usually requested as an **all-inclusive amount** for the requested scope of work plus for any **additional** expense-based billable costs. Fees for future projects associated with the scope of work determined by the Long-Range Plan arrived at are often requested too.

SCHEDULE

We suggest districts offer those companies they have requested proposals from a **walk-through** of the included facilities. This allows all prospective teams to engage in a question-and-answer session so that all parties are privy to the same information. A revised RFP and due date, if needed, along with a timeline for any questions from bidders and the district's response can be communicated. Setting the Walk-Through date 1-2 weeks after the RFP is sent out and another 2 weeks before it is due will allow for bidders to attend the event and for any updates discovered in this process to be sent out and considered by bidders prior to the RFP's submission. These tours are valuable opportunities to begin meet the people that your district may be partnering with for this important work.

When is the **proposal due** to the district and in **what format**? To whom should it be **addressed**? Will there be **interviews** for all bidders or a few, and if so, is there a date that can be held on calendars in advance of a formal invite?

EVALUATION AND SELECTION PROCESS:

This portion of the RFP specifies **the process for evaluation** of bidders and any anticipated decision-making timeline on the part of the district. This is also the best place to inform potential bidders of if, and how, they may submit additional information and data they believe may be helpful to the district in the evaluation process and where to include literature describing the firm's background and previous experience with school districts. **Selection criteria** is provided in this section which mirrors the Objectives and outlines any **rubric or scoring categories** for bids. This often includes things such as:

- Completeness of information requested/how customized the proposal is to the district and its specified needs
- An outline of any specialized services requested, such as communications or referendum support services
- Experience/qualifications and verified past performance of team proposed for project
- Fee schedule

RECOMMENDED APPROACH TO VETTING OF BIDDERS:

Just like conducting candidate reference checks for employment, a crucial component of selecting a partner for Long-Range Facilities Planning is completing **deep and thorough reference checks** on the company and individuals with whom you would be working. Confirming the proposed project team is committed to your process makes sense as well.

In addition to requesting the names of school districts for which the firm has completed **similar work in the past five years**, we suggest you request contact information for construction management firms and other professional service firms who partner with design and planning firms in the educational market regularly. You may also want to ask for **specialized references** as well, for instance, if you believe you will need to go to referendum, perhaps requesting contact details for communications persons in districts who have gone to referendum (in addition to likely other contacts provided such as a superintendent, business manager, or facilities lead) will provide **valuable insights**.

The careful selection of a planning partner will ensure mutually beneficial relationships are established and the community's interests are best served for years to come.



FOR MORE RESOURCES:

The pros at PRA welcome the chance to help you.

Contact Nicholas Kent, Partner - Education Studio, at nkent@prarch.com or 414-410-2968.

