

SALIDA SCHOOL DISTRICT R-32-J

BOARD OF EDUCATION

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David Blackburn, Superintendent

REQUEST FOR QUALIFICATIONS/PROPOSAL (RFQ/P) FOR A Strategic Plan Consultant

Salida School District R-32-J

PROPOSAL DUE DATE/DELIVERY REQUIREMENTS- 4:00 p.m. May 27th, 2021

Deliver 1 electronic copy via email to:

David Blackburn, Superintendent

c/o Brett Pyle

Salida School District R-32-J

Salida, CO 81201

Phone (719)530-5206

bpyle@salidaschools.org

All official communication with candidates and questions regarding this RFQ/P will be via email to the contact listed above. **No inquiries will be accepted after the clarification deadline as indicated in the project schedule.**

All Candidate inquiries will be responded to at the same time after the "Clarification Deadline". Responses to clarification will be made available on the District website where the RFQ/P is posted. Candidates should not rely on any other statements, either written or oral, that alter any specification or other term or condition of the RFQ/P during the open solicitation period. Candidates should not contact any team members or any individual associated with the District regarding this RFQ or this project.

I. PROJECT SCHEDULE

RFQ/P Available	5/3/2021
OPTIONAL zoom call***	5/19/2021
RFQ/P Clarification Deadline	5/20/2021
RFQ/P Clarification Responses from District	5/24/2021
RFQ/P Responses due	5/27/2021
Superintendent Phone Interviews Candidates	6/3/2021

The following dates are tentative and will be confirmed later based on availability of selection team members:

On-site interviews	6/7/2021
Candidate Notified of Selection/Begin Contract Negotiations	6/8/2021
Completion of Contract Negotiations	6/15/2021
Decision Memorandum Sent to Unsuccessful Candidates	6/15/2021
Graduation Guidelines Plan Complete	2/1/2022
Community Presentations Complete	3/1/2022

***Please RSVP to Brett Pyle at bpyle@salidaschools.org if you plan to attend the zoom call. After registering the link will be sent via email. The call is strictly optional and will not be considered in evaluating proposals.

II. BACKGROUND

District Background

Salida School District R-32-J is located in Salida, Colorado, in the Upper Arkansas Valley and serves the communities of Salida, Poncha Springs, and Howard. The district's current enrollment is approximately 1,300 pupils. The District has maintained a strategic plan with community check-ins of graduation expectations in 2017 and community values in 2018. That plan has guided the board of education in setting strategic priorities. The district has been named a District of Distinction 7 of the last 9 years. The district has won countless other recognitions, such as a Colorado Succeeds award. At the time of the previous facility plan the district was predicted by all measures to weather a declining enrollment trend. That prediction did not hold. The state and the county has seen the opposite. An additional increase of 200+ students is likely in the next 3-5 years. The District successfully led the community through an annexation ballot measure to bring in a new Colorado Mountain College campus to serve the greater Salida community. Simultaneously to launching that new higher education effort the global pandemic took over all operational concerns. The district found a way to operate in-person programming and started an online program with 160 students to navigate the pandemic. Having found a way to navigate the COVID Pandemic, the district now needs to review its strategic plan and map out how graduation guidelines can inform the work for the next 3-5 years.

Project Description

The district requires the assistance of an outside expert(s) in the renewal of a comprehensive strategic plan to ensure that programs meet the educational and support service needs of the district into the future. In particular, the Board of Education began a conversation regarding significant changes to the graduation guidelines. The District has paused the conversation because sufficient federal stimulus dollars have allowed the community to more fully discuss any changes in programming. The district is looking for outside expertise to lead the next stage of staff and community conversations regarding graduation guidelines. The results of these processes will drive the District's educational program for the foreseeable future. It is *estimated* that a person/team would need 30 days to complete the project.

III. STRATEGIC PLAN AND GRADUATION GUIDELINES OBJECTIVE

The updated strategic plan will address both the short-term and long-term program needs of the District taking into account District graduation guidelines and enrollment projections. The team should be able to lead stakeholder processes that marry the perspectives of staff, leadership, and the greater community. A strategic plan renewal and a final recommended graduation guidelines policy is expected.

IV. SUBMITTAL REQUIREMENTS

Organize your RFQ/P response using the following outline. Please separate each section using the appropriate section labels. **No fees shall be included in the RFQ/P Submittal.**

SECTION 1 - LETTER OF INTEREST

A maximum two-page letter of interest that includes a synopsis of the firm/consultant, business principals, distinguishing characteristics, approach to completing this project, primary contact information, and is signed by the principal-in-charge.

SECTION 2 - EXPERIENCE AND QUALIFICATIONS

Please address each criterion listed below as it relates to your firm's relevant experience and qualifications.

1. Identify the individual who will be the main point of contact and the team (if applicable) responsible for providing services for the duration of the project. The District reserves the right to determine the acceptability of these individuals.
2. Provide all team members experience, background and responsibilities including resumes.
3. Describe your firm's/consultancy's past experience with strategic planning and graduation guidelines.
4. According to your firm, what is the value of a strategic plan and what is it used for?
5. According to your firm, what makes a stakeholder process valid?
6. Describe your approach to integrating multiple sources of information about the District's strategic plan.
7. Show your ability/approach to organize and meet schedules.
8. Identify planning efforts your firm has completed with a similar size and scope to the proposed project.
9. Demonstrate experience in understanding and analyzing school operations, school programs, enrollment projections and demographic data.
10. Identify any other unique challenges/approaches that you have experienced that will assist the District with developing a successful strategic plan and graduation requirements.
11. Based on your current workforce and staffing, in addition to the number of projects your firm currently has under contract or in negotiation, does your firm have the capacity to complete this project? What percentage of your firm is currently involved in other projects?
12. This project requires the Candidate to carry, at a minimum, general liability insurance and workers compensation according to State laws.

SECTION 3 - SCOPE OF SERVICES

The Candidate chosen will be expected to update a strategic plan through a team effort involving school administration, staff, school board members, students, and community members. The strategic plan should be aligned with the District's vision, and should explore a variety of options of graduation guidelines. The graduation guidelines policy recommendation should include a strategic implementation plan for short and long-term programming.

Please address each of the following items below.

1. Strategic Planning Services

Outline the complete scope of services, to include three categories: Minimum Services, Additional Services Desired by the District, and Additional Scope Offered by Candidate

By submitting a response and proposal to this RFQ/P, candidates are agreeing to provide all services associated with the development of the Strategic Plan and Graduation Guidelines deliverable described. In general, these services may include, but are not limited to:

- a) Facilitating Community/Committee Meetings to gather information and seek input;
- b) Assisting leadership and district committees with analyzing information and/or generating options;
- c) Developing multiple options for consideration, and providing adequate information for analysis;
- d) Assisting District in prioritizing potential program adjustments toward build-out of selected option,
- e) Completing and publishing the Strategic Plan document as described in a deliverable format.

Please provide a separate narrative description of your approach to the scope requested, describing quantity and types of proposed meetings, site visits, unique methodologies, etc. Additional services or scope may be proposed and

identified; however, fees for these services should be identified as a line item in the fee proposal for consideration. Any exclusions from services or deliverables described must be explicitly identified in the submittal.

2. ADD ALTERNATE #1 - Grant Application Support Services

In the event that the strategic planning process results in the District proceeding, the District may request assistance with preparation of grant applications. Please note if you are interested in this add alternative. These grant assistance services may include but are not limited to:

- a) Preparing the grant application including scope narrative for final District approval;
- b) Ensuring that all costs (hard, soft, and district) and scope are included in grant applications;
- c) Ongoing communication with the District;
- d) Coordination of and attendance at meetings as needed and requested (via conference call if possible);
- e) Communication and cooperation with CDE staff as needed;
- f) Providing additional information required for CDE to complete the analysis of the grant application;
- g) Acting as a liaison for the District for CDE follow-up grant questions;
- h) Other duties as required;

SECTION 4 – SCHEDULE

It is expected that your firm has the current capabilities and capacity to complete the strategic plan policy recommendation by the date listed in the project schedule. Provide a detailed master plan schedule, including milestones, from the notice to proceed date to the completion of the master plan. Provide reasoning, in this section, for any modifications or alterations your firm wishes to make to the recommended project schedule.

SECTION 5 - REFERENCES

Provide a comprehensive list of **ALL** school projects completed or begun within the last 5 years, with contact information, along with a project description. The District reserves the right to check additional references beyond those provided in the submittal.

V. SUBMITTAL REVIEW & SELECTION PROCESS

The selection process consists of two phases, followed by negotiations with the apparent winner.

Phase 1 – RFQ/P Review

The District's Selection Committee will evaluate and score the RFQ/P submittals based on the selection criteria listed below:

Selection Criteria	Max Points Possible
Section 1: Letter of Interest. How complete and concise was the letter of interest and RFQ/P response? Was the RFQ/P well organized, with complete information responding to all of the submittal criteria?	10 points
Section 2: Experience and Qualifications. Provided a comprehensive and insightful experience and qualifications package which highlighted key personnel in addition to other items as stated.	25points
Section 3: Scope of Services. Candidate has affirmed each of the Districts requirements for this project and demonstrates a clear understanding of District's needs and clear direction toward completing scope of work.	25points
Section 4: Schedule. Ability to complete the planning tasks within the timeframe needed. Submitted complete & understandable schedule.	20points
Section 5: References. Candidate has provided a comprehensive project list with contact information for projects completed over the last five years.	20 points
Total Points	100 points

Phase 2 - Interview

The superintendent will conduct phone interviews with the top scored applications. The Superintendent will provide the finalist list of candidates to an interview committee composed of staff, leadership, and board members. An interview invitation will be sent out to finalists. The invitation will explain the interview requirements and provide the time and location for in-person interviews. The purpose of the interview is to ensure a full understanding of the RFQ/P responses.

The interviews will consist of a short presentation followed by a longer period for questions and answers. During the short presentation, the lead consultant for the project should be identified along with any members of the consultant planning team. Please note team members that will not be directly working on the project are not invited to the oral interviews.

The apparent winner will be determined based on their interview score, which is separate from their RFQ/P submittal score.

VI. FEE PROPOSAL

Finalist Candidates shall prepare a detailed fee proposal as outlined below. The fee proposal is to be submitted in a sealed envelope prior to the start of their interview. Failure to provide a fee proposal which addresses each of the items listed below may result in disqualification from the RFQ/P process.

Detailed fee proposals shall include the following:

- Lump sum fee;
- Statement of work;
- Confirmation that all scope items from the original RFQ/P will be addressed;
- Any exclusions with explanations;
- number of hours;
- number of people;
- Other resources;
- How the resources are to be used;
- Breakout of anticipated reimbursable expenses included in the fee proposal;
- Hourly rates for all personnel involved in the project;
- Number of site visits anticipated to complete the work;
- Breakout of fees for any non-required scope proposed;
- Pricing for add alternate #1 - Grant Application Support Services*

*Note: The alternate #1 is to be considered optional for the District. Provide a separate fee alternate services.

The negotiated fee is anticipated to include all costs including reimbursable expenses for the project resulting in a "not to exceed" format contract.

Only the fee proposal of the apparent winner will be revealed to the selection committee.

If the apparent winner's fee exceeds the District's budget and if subsequent negotiations with the apparent winner are unsuccessful, the District reserves the right to negotiate with the next highest-scoring Candidate.

VII. ACCEPTANCE AND REJECTION

After the final selection has been made, the District will provide a summary of scores and a decision memorandum to each of the RFQ/P Candidates.

The District reserves the right to select any or reject any and all proposals in their best interest. The District also reserves the right to pre-qualify any or all Candidates or reject any or all Candidates as unqualified, including without limitation the right to reject any or all nonconforming, nonresponsive, unbalanced, or conditional, qualifications. The District also reserves the right to re-solicit, waive all informalities not involving price, time, or changes in the work, and to negotiate contract terms with the apparent successful proposer.

The District is not responsible for cost incurred in preparation of this proposal. Proposals will not be returned and become the property of the District once submitted. By submitting a proposal all Candidates agree that the terms and conditions of this RFQ/P will become part of the awarded Candidates contract. The apparent winner will be responsible for submitting a draft agreement to be used for this project. The District and the District's legal council will review the agreement and negotiate terms prior to commencement of work.

If the master planning process results in a decision to move forward on a capital project, the District will complete a separate competitive selection process to select the design and construction team for that project.