

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
DEPARTMENT OF GENERAL SERVICES**

Contracts and Procurement Division



*Brian Hanlon
Interim Director*

2000 14th Street, N.W.
Washington, D.C. 20009
Phone: (202) 727-2800

D.C. DEPARTMENT OF GENERAL SERVICES

REQUEST FOR PROPOSALS

PUBLIC EDUCATION MASTER FACILITIES PLAN

October 27, 2011

Proposal Due Date: November 22, 2011 by 2 p.m. EDT

Preproposal Conference: November 8, 2011 at 10:30 a.m. EDT
Reeves Center – Community Room - 2nd Floor
Washington, DC 20009

Contact: J. W. Lanum
Interim Associate Director
2000 14th Street, N.W.
8th Floor
Washington, D.C. 20009
Phone: (202) 727-2800

Solicitation #: DCAM-2012-R-0022

SOLICITATION, OFFER, AND AWARD			1. Caption Public Education Master Facilities Plan		Page of Pages		
2. Contract Number		3. Solicitation Number DCAM-2012-R-0022		4. Type of Solicitation		5. Date Issued 10/21/2011	
				<input type="checkbox"/> Sealed Bid (IFB) <input checked="" type="checkbox"/> Sealed Proposals (RFP) <input type="checkbox"/> Sole Source <input type="checkbox"/> Human Care Agreements <input type="checkbox"/> Emergency		6. Type of Market	
						<input checked="" type="checkbox"/> Open <input type="checkbox"/> Set Aside <input type="checkbox"/> Open with Sub-Contracting Set Aside	
7. Issued By: Department of General Services Contracting and Procurement 2000 14th Street, NW Washington, DC 20009				8. Address Offer to: Department of General Services Contracting and Procurement 2000 14th Street, NW Washington, DC 20009			

SOLICITATION

9. Sealed offers in original and copies for furnishing the supplies or services in the Schedule will be received at the place specified in Item 8, or if hand carried to the bid counter located at Department of General Services 2000 14th Street, NW 3rd Floor, Washington, DC 20009 until local time (Hour) (Date)

CAUTION: Late Submissions, Modifications and Withdrawals: See 27 DCMR chapters 15 & 16 as applicable. All offers are subject to all terms & conditions contained in this solicitation.

10. For Information Contact	A. Name		B. Telephone			C. E-mail Address	
	(Area Code)	(Number)	(Ext)				

11. Table of Contents

(X)	Section	Description	Page No.	(X)	Section	Description	Page No.
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OFFER

12. In compliance with the above, the undersigned agrees, if this offer is accepted within calendar days from the date for receipt of offers specified above, to furnish any or all items upon which prices are offered at the price set opposite each item, delivered at the designated point(s), within the time specified herein.

13. Discount for Prompt Payment 10 Calendar days % 20 Calendar days % 30 Calendar days % Calendar days %

14. Acknowledgement of Amendments (The offeror acknowledges receipt of amendments to the SOLICITATION):	Amendment Number	Date	Amendment Number	Date

15A. Name and Address of Offeror	16. Name and Title of Person Authorized to Sign Offer/Contract		

15B. Telephone		15 C. Check if remittance address is different from above - Refer to Section G	17. Signature	18. Offer Date
(Area Code)	(Number) (Ext)			

AWARD (TO BE COMPLETED BY GOVERNMENT)

19. Accepted as to Items Numbered	20. Amount	21. Accounting and Appropriation

22. Name of Contracting Officer (Type or Print)	23. Signature of Contracting Officer (District of Columbia)	24. Award Date

SECTION B: CONTRACT TYPE, SUPPLIES OR SERVICES AND PRICE/COST

B.1 The District of Columbia Department of General Services (DGS), Contracting and Procurement Division, on behalf of the Office of the Deputy Mayor for Education, (the “District”) is seeking a contractor to develop a citywide, long-range public education facilities plan, facilitate a neighborhood planning process, develop a decision framework, and build a long-range financial strategy.

B.2 The District contemplates award of a **firm-fixed-price contract**.

B.3 COST SCHEDULE**Base Period of Performance**

Contract Line Item No. (CLIN)	Item Description	Total Price
001	Task 1: Community engagement plan and execution in accordance with section C.6.1	\$ _____
002	Task 2: Data collection and analysis in accordance with section C.6.2	\$ _____
003	Task 3: School plans in accordance with section C.6.3	\$ _____
004	Task 4: Portfolio analysis in accordance with section C.6.4	\$ _____
005	Task 5: Needs assessment in accordance with section C.6.5	\$ _____
006	Task 6: Draft Master Facilities Plan and Web-based data portal in accordance with section C.6.6 Task 6.	\$ _____
007	Task 7: Published master facilities plan in accordance with section C.6.7	\$ _____
Grand Total		\$ _____

B.4 In order to establish the costs for any work in addition to the tasks included in Sections C.6.1 through C.6.7, please provide per hour rate(s) for personnel to be assigned to this contract. These rates should reflect the personnel to be assigned to complete the tasks included in Sections C.6.1 through C.6.7 and included in responses to Section J – Factor 1.

SECTION C: SPECIFICATIONS/WORK STATEMENT

C.1 SCOPE:

The goal of this procurement is to develop a citywide, long-range public education facilities master plan for the District of Columbia. The District seeks a contractor to lead development of the Master Facilities and Capital Plan (the “Plan” or “MFP”), develop a decision framework for annual capital planning, and build a long-range financial strategy for school modernization, maintenance and development. The Plan will incorporate community recommendations, address facility deficiencies, build an analytical fact base and framework, and suggest tools for implementation.

The general scope of work includes the development of a Master Facilities and Capital Plan document, a community engagement process, consolidation of facilities’ conditions information, an update of demographics and utilization analysis, a portfolio analysis and facility descriptions, a long-range financial strategy, and a published and publicly accessible document and information portal.

The Master Facilities and Capital Plan is a long-range model and implementation strategy that describes how the District will allocate, use and improve DCPS school buildings, offices and other facilities to support high-quality teaching and learning in the District of Columbia. It will be updated on an 8-year schedule, though addenda may be submitted to Council along with the annual Capital Improvement Plan (CIP).

The MFP provides the framework of community-based recommendations, data analysis, conditions information and costs to inform the annual update of the Capital Improvement Plan. The CIP outlines DCPS’ capital construction program and budget for a 6-year period. It includes a planning-level cost estimate and a broad scope of work. It is updated annually between September and November with new cost figures and changes in project sequence. It is then incorporated into the Mayor’s overall capital plan and submitted to Council along with the Mayor’s budget in March. The scope of work for the Master Facilities Plan includes a capital planning strategy and recommendations for the allocation of capital resources, but does not include changes to the annual CIP.

The Master Facilities Plan will serve as the foundation for the District of Columbia Public Schools’ capital planning and construction strategy. The Office of the Deputy Mayor for Education (DME) will serve as project manager. DCPS’ programmatic requirements should guide all deliverables. The scope of work requires significant coordination with both DME and DCPS.

A successful outcome of this procurement will include: (1) new utilization analysis and recommendations for “right-sizing the system”, (2) thorough and publicly accessible data and analysis, (3) extensive community input, and (4) a viable long-term financial strategy. The Plan will include recommendations for reducing excess property, short and long-term priorities, alternative financing strategies and implementation strategies. **Most importantly, it will serve as a tool for decision-makers and citizens of the District of Columbia to allocate resources in an efficient and equitable manner that improves student outcomes.**

The primary deliverable will be an 8-year Master Facilities Plan for public education facilities in the District of Columbia. The District expects it will take approximately 10 months to complete the

Plan including community engagement. Respondents must demonstrate the capacity to run a thorough public engagement process.

The following is a list of expected deliverables that will support the Master Facilities Plan:

1. Community engagement plan and activities
2. Consolidated conditions information
3. Enrollment and utilization analyses
4. Demographics, housing and neighborhood conditions analyses
5. System-wide needs assessment
6. Project and school descriptions including a market analysis for underutilized or vacant properties
7. Long-term financial strategy for modernization and maintenance
8. Web-based facilities data portal
9. Recommendations for reducing excess property and “right-sizing” the system
10. Criteria to identify and prioritize modernization work
11. Draft Plan
12. Final Plan with public release
13. Ongoing project management support

C.2 APPLICABLE DOCUMENTS

The following documents are applicable to this procurement and are hereby incorporated by this reference:

Item No.	Document Type	Title	Date
1	Law	School Based Budgeting and Accountability Act of 1998 (DC Official Code §38-2803)	Current
2	Law	FY11 Budget Support Act of 2010 (DC Law 18-0223, pp. 107-109)	Enacted July 2, 2010
3	Law	Public Education Reform Act (DC Law 17-9)	Enacted April 23, 2007

C.3 DEFINITIONS

These terms when used in this RFP have the following meanings:

- Project Team – the respondent’s staff and sub-contractors who will work on the Master Facilities Plan.
- Respondent – the company, team or person(s) submitting a proposal.

C.4 BACKGROUND

Until 2007, the District of Columbia Public Schools (DCPS) was responsible for all planning, maintenance, modernization and new construction of public education facilities. In 2005, DCPS commissioned a master planning effort that included a thorough facilities conditions assessment, demographic trends, enrollment projections, analysis of operational efficiency and community meetings. Council, however, did not approve the 2006 plan.

After the Mayor gained direct oversight of the District of Columbia Public Schools in 2007, the District set up the Office of Public Education Facilities Modernization (OPEFM) to assume responsibility for planning, stabilization, modernization and new construction of DCPS facilities. OPEFM immediately set out to clear the substantial backlog of work orders, stabilize the system and address the most significant facilities problems.

In 2008, OPEFM developed a Master Facilities Plan in consultation with DCPS and the Mayor. This plan included a phased approach to modernize every public school facility within 15 years. Phase 1 of this strategy addresses the learning environment. Phase 2 addresses support spaces such as auditoriums, gymnasiums, locker rooms, grounds and other shared space. Phase 3 addresses the building systems including mechanical, electrical, plumbing and roofing. Council approved the 2008 Master Facilities Plan and OPEFM put the phasing approach into practice beginning in the summer of 2009. The agency updated its facilities plan in 2010 with new enrollment projections, project sequencing and facility plan details.

Under the FY11 Budget Support Act of 2010, the Council transferred responsibility for facilities planning to a newly created Office of Public Education Facilities Planning (OPEFP) under the Deputy Mayor for Education (DME). The intent of this legislation was to align the MFP with the annual CIP and improve oversight of school facility planning and development. Because of the changes in statute, policy, and processes, it is expected that coordination and communication across DC public agencies will be an important component of the Master Facilities Plan development process.

At this time, there are approximately 120 active school buildings in DCPS' inventory, 20 buildings leased to charter programs and 15 vacant properties. This covers approximately 12.7 million square feet of space. Due largely to deferred maintenance, many of these buildings are still in poor condition. Even though DCPS closed 23 schools in 2008 and an additional five schools since then, the school system remains weighed down with excess capacity. Utilization rates in the 2009-2010 school year ranged between 21% and 138%. Enrollment in non-special education facilities ranged from 114 at Marshall Elementary up to 1500 at Wilson High School. Since its peak in the 1960's, total student enrollment in DCPS schools has dropped to a low of about 45,000 students in 2009. In the last two years, enrollment stabilized and in 2010 DCPS saw its first increase in enrollment since 1969. There are also 55 authorized charters on 92 campuses. Since they were introduced in the mid-1990's, enrollment at charter schools has steadily increased to nearly 30,000 students or 40% of the total student population in the District of Columbia.

Since its inception in 2007, OPEFM has modernized a substantial amount of DCPS space. Five high schools, three middle schools and six elementary schools have been newly constructed or fully modernized, and five full modernizations are underway, including Takoma Education Campus,

which burned down in the winter of 2011. Almost 20 elementary and middle schools have received modernized classrooms, bathrooms and auxiliary spaces. Through the stabilization program,

OPEFM cleared a backlog of nearly 20,000 work orders and over 86,600 work orders in total. By 2010, nearly 60 non-compliant schools had been brought up to Department of Health standards.

While the District faces significant financial constraints, the Mayor and Council are committed to modernizing and maintaining District schools to provide the highest quality educational environment in the country. The annual budget for modernization and stabilization has averaged about \$226 million since 2007. The vast majority of this work is paid for with General Obligation bonds. In order to bring school buildings into the future, support aging buildings during their lifespan, and right-size building stock in line with enrollment, the District is seeking a dynamic financial strategy that not only takes into account the current state of the economy, but looks for innovative ways to diversify sources of funding and align resources with positive student outcomes.

Lastly, broad community involvement is crucial to the success of this long-range master facilities plan. There is a broad array of interested stakeholders in the District of Columbia. While parents, students and teachers are the primary stakeholders, advocates, administration officials, neighborhood leaders and the general public also have a deep interest in what happens to school facilities in the District. Community members will provide recommendations to guide the modernization, consolidation and development of educational facilities. The community engagement plan will be among the first required tasks because the Master Facilities Plan must be grounded in a thorough neighborhood planning process to inform the public and give all stakeholders an opportunity to be heard.

C.5 STAKEHOLDERS

The following organizations or groups are examples of stakeholders in this process. This is not the complete list and input should not be limited to those listed here:

1. Students and families of the District of Columbia schools
2. Residents of the District of Columbia
3. DCPS leadership and administration
4. DCPS teachers
5. Council of the District of Columbia
6. District of Columbia Office of Planning (OP)
7. District of Columbia Housing and Community Development (DHCD)
8. Parent Teacher Associations
9. Advisory Neighborhood Commissions
10. Office of the Deputy Mayor for Planning and Economic Development (DMPED)
11. Department of General Services (DGS)
12. Public Charter School Board (PCSB)

C.6 REQUIREMENTS

The Master Facilities Plan is a long-range strategy that describes how the District will allocate, use and improve school buildings, offices and other facilities to support high-quality teaching and learning in the District of Columbia. A successful Master Facilities Plan is a roadmap for allocating

capital resources needed to improve the learning environment in ways that support student achievement.

The Contractor shall provide his or her own office space and equipment including Geographic Information Software (GIS) to perform the following task:

C.6.1 Task 1: The District Government has a duty to solicit, incorporate and feature community members' thoughts, preferences and recommendations for school planning. This task includes preparation and implementation of a community engagement strategy, led by DCPS and DME, which will generate a meaningful exchange of ideas and community-based recommendations to support the final long-range Master Facilities Plan.

The objective of the public outreach campaign is two-fold: 1) gather community priorities and recommendations for the use, adaptation and right-sizing of public education facilities in the District of Columbia, and 2) inform stakeholders of the modernization process and plans.

C.6.1.1 Prepare and execute a comprehensive public outreach strategy that will maximize public participation in the planning process. The Project Team should be prepared to coordinate and advertise community meetings, prepare meeting materials (i.e. maps, analysis, slideshows and refreshments), facilitate meetings, record meeting notes, compile outcomes and track the next steps.

C.6.1.2 Develop and implement communication tools to circulate information and gather public input. This is in addition to the public meetings and may include alternative and innovative means of communicating with stakeholders such as focus groups, social media, surveys and site tours, etc.

C.6.2 Task 2: This task covers the collection, analysis, synthesis and mapping of relevant data. It includes conditions information, enrollment projections, utilization analysis, demographic analysis, and neighborhood conditions. The contractor will be asked to develop the information architecture (spreadsheets, database, map layers, etc) in coordination with the Office of Planning and the Office of the Chief Technology Officer. This will serve as the foundation of a needs assessment and web-based information platform. There is a preliminary list of indicators to be incorporated into the data analysis section of the final Plan in Attachment A.

The Department of General Services keeps and updates facility conditions assessments. This solicitation does not include updating the conditions assessments. DGS will make the most recent facility conditions information available.

C.6.2.1 Retrieve and compile facilities conditions information into a single, accessible platform that will be used for recording, analyzing and reporting conditions information in the Master Facilities Plan.

C.6.2.2 In coordination with the Office of Planning and the Office of the Chief Technology Officer, develop an information system to aggregate, record, maintain, analyze and report relevant data. The information should be organized so that District personnel can update, maintain, analyze and map the data going forward. The data will serve as the foundation of the following analyses as well as the back-end of a web-based dashboard (see Task 6.7.).

C.6.2.3 Prepare a capacity and utilization analysis using several measures of capacity such as space capacity and program capacity.

C.6.2.4 Collect historical enrollment information; update DCPS enrollment projections; prepare a growth analysis and projection for charter schools.

C.6.2.5 Prepare a detailed demographics analysis at the neighborhood level using the most recent census figures and all relevant data sources.

C.6.2.6 Prepare detailed analysis of neighborhood conditions including housing trends, planned projects, economic development factors, transportation access and mobility, access to healthcare services, welfare conditions, and relationships to other community assets and facilities such as recreation facilities and libraries.

C.6.2.7 Prepare a student mobility analysis that calculates annual movement into and out of each school.

C.6.2.8 Additional data collection and analysis as needed.

C.6.3 Task 3: Update, edit and compile descriptions, analysis and plans for each school and planning cluster. This does not include designing land use plans for each school or property.

C.6.3.1 Describe each school's program and its relationship to adopted education plans including the youth development plan described in Sec. 202 of the Public Education Reform Act of 2007.

C.6.3.2 Many schools include recreation or other facilities that serve the community at large. Describe how those schools function as community centers and how to leverage school facilities for community activities.

C.6.4 Task 4: Develop a facility portfolio analysis and long-range financial strategy. The final Master Facility Plan will serve as a guide and framework for the District's annual capital plan.

C.6.4.1 Describe the location, planning, use and design needs of public education facilities in the District of Columbia.

C.6.4.2 Prepare a detailed analysis of capital expenditures from 2007-2011. This should include descriptions of the maintenance and operational challenges of each facility.

C.6.4.3 Prepare a scenario analysis with detailed projections of capital needs from 2012-2020 including capital, and operations and maintenance.

C.6.4.4: Prepare an analysis of capital needs and opportunities for charter schools. Include projections of charter capital requirements from 2012-2020.

C.6.4.5: Complete a site and market analysis for projects identified as potential opportunities for a public-private partnership.

C.6.4.6: OPEFP will lead an intra-governmental capital finance team to develop recommendations for alternative financing strategies and opportunities for public-private partnerships. Using the analyses listed above, the Consultant will support the team's work.

C.6.5 Task 5: Prepare a needs assessment and decision framework. Evaluate conditions information, data analysis and financial needs and compare these results with the current Capital Improvement Plan and school improvement pipeline. Develop an analytical framework to guide decision-making on education facilities using these results. The framework should be based on clear metrics such as capacity needs, safety and costs. Support OPEFP in communicating this analysis and framework to relevant DC officials and agencies. This will be an ongoing tool for District Government and the public to make informed decisions regarding school facilities.

C.6.5.1 Prepare a structured needs analysis based on community recommendations, conditions information, data analysis and financial plans.

C.6.5.2: Prepare recommendations for reducing excess space, modernizing and maintaining active facilities, and building new capacity over the long run. Include specific recommendations on co-locations, consolidations and closures.

C.6.5.3: Draft recommendations for a capital planning strategy and framework to guide decisions on the annual Capital Improvement Plan (CIP). Currently the District uses a phasing strategy that intends to modernize all DCPS facilities within 15 years. This task will update that strategy, but should still meet the essential goal of upgrading every facility.

C.6.6 Task 6: Prepare and publish the long-range Master Facilities and Capital Plan. Develop a web-based education facilities dashboard.

Task 6.6.1: Prepare an outline of the final Master Facilities Plan.

Task 6.6.2: Analyze, compile and incorporate final community recommendations.

Task 6.6.3: Prepare a draft report including the results of the needs assessment and circulate the draft plan among District officials, agencies and stakeholders. At a minimum, this will cover the following broad areas and should include charts, maps and tables:

- Guiding Principles
- Utilization and demographics analysis
- Facility descriptions
- Financial strategy
- Implementation

Task 6.6.4: Compile feedback and edit the final document.

Task 6.6.5: Print at least 10 full-color, bound copies of the final Master Facilities Plan.

Task 6.6.6: Provide all data files and electronic copies of the Plan to OPEFP.

Task 6.6.7: Develop a website and/or internet-based application to share, display, analyze and maintain data by school and planning cluster. At a minimum, this should include at-a-glance analysis on space availability, enrollment, capacity, utilization, room uses, population projections, and demographics, facility characteristics such as age, square footage and recent modernization work. This should be designed for public access and use by District officials.

C.6.7 Task 7: Provide project management support and coordination until project completion.

Task 6.7.1: Prepare detailed work plans with project deliverables, ownership and a primary point of contact.

Task 6.7.2: Coordinate work tasks and data collection across District public agencies including the District of Columbia Public Schools, Office of Public Education Facilities Modernization (now the Department of General Services), and the Office of Planning, Office of the State Superintendent of Education, Public Charter School Board, etc.

Task 6.7.3: Engage with relevant agencies and incorporate feedback at regular periods throughout the planning process, but especially during analytical and writing stages.

Task 6.7.4: Produce professional quality documents.

Task 6.7.5: Maintain regular meetings with OPEFP. Coordinate meetings with partner agencies and stakeholders as necessary, but keep OPEFP informed of all points of contact.

Task 6.7.6: At the end of each month, provide detailed invoices with highlighted deliverables.

SECTION D: PERIOD OF PERFORMANCE

D.1 TERM OF CONTRACT

The term of the contract shall be for a period of **12 months** from the date of award.

D.2 OPTION TO EXTEND THE TERM OF THE CONTRACT

D.2.1 DGS's expectation is that the tasks required under Sections C.6.1 through C.6.7 can be completed in 12 months and should be completed in accordance with the schedule in Section D.3. The District may extend the time of the contract to complete such tasks, may issue change orders for additional work, and may extend the contract by written notice to the Contractor before the expiration of the contract. The extension of the contract and any additional work is subject to the availability of funds at the time of the extension or request for additional work.

D.2.2 The price for any additional work shall be based on a negotiated scope of work and the rates provided under Section B.3.

D.2.3 The total duration of this contract, including the exercise of any options under this clause, shall not exceed **24 months**.

D.3 DELIVERABLES

The Contractor shall perform the activities required to successfully complete the District's requirements and submit each deliverable to the COTR identified in section G.9 in accordance with the following:

CLIN	Deliverable	Quantity	Format/Method of Delivery	Due Date
Task 1	Community Engagement Plan	1	Report	February 3, 2012
Task 2	Data collection and analysis	1	Report	June 14, 2012
Task 3	School plans and descriptions	1	Report	October 1, 2012
Task 4	Market analysis and long-range financial strategy	1	Report	August 1, 2012
Task 5	Needs assessment	1	Report	June 14, 2012
Task 6	Draft Master Facilities Plan including recommendations for right-sizing the system & criteria for prioritizing modernization work	1	Report	October 12, 2012
Task 6.6.1	Master Facilities Plan outline	1	Document	February 3, 2012
Task 6.6.7	Web-based dashboard	1	Database and website	Sept. 7, 2012
Task 7	Final Long-Range Master Facilities Plan	1	Report	Nov. 30, 2012

D.3.1 The Contractor shall submit to the District, as a deliverable, the reports described in section F.3 that is required by the 51% District Residents New Hires Requirements and First Source Employment Agreement. If the Contractor does not submit the report as part of the deliverables, final payment to the Contractor shall not be paid.

SECTION E: CONTRACT ADMINISTRATION

E.1 CONTRACTING OFFICER'S TECHNICAL REPRESENTATIVE (COTR)

E.1.1 The COTR is responsible for general administration of the contract and advising the CO as to the Contractor's compliance or noncompliance with the contract. The COTR has the responsibility of ensuring the work conforms to the requirements of the contract and such other responsibilities and authorities as may be specified in the contract.

E.1.2 The address and telephone number of the COTR is:

Marc Bleyer
Capital Program Manager
1350 Pennsylvania Ave. NW, Ste. 303
Tel. 202-727-9543
Fax 202-727-8198
marc.bleyer@dc.gov

SECTION F: ECONOMIC INCLUSION

F.1 PREFERENCE FOR SMALL, LOCAL, AND DISADVANTAGED BUSINESS ENTERPRISES

General: Under the provisions of the Small, Local, and Disadvantaged Business Enterprise Development and Assistance Act of 2005, D.C. Law 16-33 (codified at D.C. Code § 2-218.01 et seq.), preferences shall be given to Offerors that are certified by the Department of Small and Local Business Development as being a small business enterprise, having resident business ownership, having a longtime resident business, being a local business enterprise, being a disadvantaged business enterprise, being a local business enterprise with its principal office located in an enterprise zone, being a veteran-owned business enterprise, or being a local manufacturing business enterprise. (A copy of the certification acknowledgment letter must be submitted with the Offeror's Proposal.) In accordance with these laws, the following preferences shall be awarded in evaluating an Offeror's proposal:

- Three (3) preference points shall be awarded if the Offeror is certified as having a small business enterprise.
- Five (5) preference points shall be awarded if the Offeror is certified as having a resident business ownership.
- Five (5) points shall be awarded if the Offeror is certified as having a longtime resident business.
- Two (2) preference points shall be awarded if the Offeror is certified as a local business enterprise.
- Two (2) preference points shall be awarded if the Offeror is certified as being a local business enterprise with its principal office located in an enterprise zone.
- Two (2) preference points shall be awarded if the Offeror is certified as a disadvantaged business enterprise.
- Two (2) preference points shall be awarded if the Offeror is certified as a veteran-owned business enterprise.
- Two (2) preference points shall be awarded if the Offeror is certified as a local manufacturing business enterprise.

Offerors may qualify for more than one of these categories, so that the maximum number of points available under this section is 12 points.

Information: For information regarding the application process, contact the Department of Small and Local Business Development at the following address or telephone number:

Department of Small and Local Business Development
One Judiciary Square Building
441 4th Street, NW, 9th Floor
Washington, DC 20001
(202) 727-3900 (Telephone Number)
(202) 724-3786 (Facsimile Number)

F.2 SLDBE PARTICIPATION

The District requires that significant participation by business enterprises certified by the Department of Small and Local Business Development as: (i) a local business enterprise; (ii) a small business enterprise; (iii) a disadvantaged business enterprise; (iv) having a owned resident business; (v) being a longtime business resident; or (vi) having a local business enterprise with its principal office located in an enterprise zone. Accordingly, and in addition to the preference points conferred by **Section F.1**, the Office requires that business enterprises certified must participate in at least 50% of the project. At least, 35% must be awarded to entities that are certified as either Small or Disadvantaged Business Enterprises by the District of Columbia Local Business Opportunity Commission and 20% to entities that are certified as Disadvantaged Business Enterprises. Offerors will be required to submit a Local Business Enterprise Utilization Plan with their proposals. The Utilization Plan must demonstrate how this requirement will be met and, to the extent possible at this stage in the project, should identify the specific firms that will be used and their respective roles.

F.3 RESIDENCY HIRING REQUIREMENTS FOR CONTRACTORS AND SUBCONTRACTORS

At least fifty-one percent (51%) of the Offeror's Team and every sub-consultant's employees hired after the Offeror enters into a contract with the Office, or after such sub-consultant enters into a contract with the Offeror, to work on this project, shall be residents of the District of Columbia.

Upon execution of the contract, the Offeror and all of its member firms, if any, and each of its subcontractors and subconsultants shall submit to the Office a list of current employees that will be assigned to the project, the date that they were hired and whether or not they live in the District of Columbia.

The Offeror shall comply with subchapter III of Chapter II of Title 1, and subchapter II of Chapter II of Title 1 of the D.C. Code, and all successor acts thereto and the rules and regulations promulgated thereunder. The Offeror and all member firms, subcontractors, tier subcontractors, subconsultants, and suppliers with contracts in the amount of \$100,000 or more shall be required to comply with the following: (i) enter into a First Source Employment Agreement (**Attachment B**) with the D.C. Department of Employment Services ("DOES") upon execution of the contract; (ii) submit an

executed First Source Agreement to DOES prior to beginning work on the project; (iii) make best efforts to hire at least 51% District residents for all new jobs created by the project; (iv) list all

employment vacancies with DOES; and (v) submit monthly compliance reports to DOES by the 10th of each month.

SECTION G: INSURANCE

- G.1 GENERAL REQUIREMENTS.** The Contractor shall procure and maintain, during the entire period of performance under this contract, the types of insurance specified below. The Contractor shall have its insurance broker or insurance company submit a Certificate of Insurance to the CO giving evidence of the required coverage prior to commencing performance under this contract. In no event shall any work be performed until the required Certificates of Insurance signed by an authorized representative of the insurer(s) have been provided to, and accepted by, the CO. All insurance shall be written with financially responsible companies authorized to do business in the District of Columbia or in the jurisdiction where the work is to be performed and have an A.M. Best Company rating of A-VIII or higher. The Contractor shall require all of its subcontractors to carry the same insurance required herein. The Contractor shall ensure that all policies provide that the CO shall be given thirty (30) days prior written notice in the event the stated limit in the declarations page of the policy is reduced via endorsement or the policy is canceled prior to the expiration date shown on the certificate. The Contractor shall provide the CO with ten (10) days prior written notice in the event of non-payment of premium.
- G.1.1. Commercial General Liability Insurance. The Contractor shall provide evidence satisfactory to the CO with respect to the services performed that it carries \$1,000,000 per occurrence limits; \$2,000,000 aggregate; Bodily Injury and Property Damage including, but not limited to: premises-operations; broad form property damage; Products and Completed Operations; Personal and Advertising Injury; contractual liability and independent contractors. The policy coverage shall include the District of Columbia as an additional insured, shall be primary and non-contributory with any other insurance maintained by the District of Columbia, and shall contain a waiver of subrogation. The Contractor shall maintain Completed Operations coverage for five (5) years following final acceptance of the work performed under this contract.
- G.1.2. Automobile Liability Insurance. The Contractor shall provide automobile liability insurance to cover all owned, hired or non-owned motor vehicles used in conjunction with the performance of this contract. The policy shall provide a \$1,000,000 per occurrence combined single limit for bodily injury and property damage.
- G.1.3. Workers' Compensation Insurance. The Contractor shall provide Workers' Compensation insurance in accordance with the statutory mandates of the District of Columbia or the jurisdiction in which the contract is performed.
- G.1.4. Employer's Liability Insurance. The Contractor shall provide employer's liability insurance as follows: \$500,000 per accident for injury; \$500,000 per employee for disease; and \$500,000 for policy disease limit.
- G.2 DURATION.** The Contractor shall carry all required insurance until all contract work is accepted by the District, and shall carry the required General Liability; any required Professional Liability; and any required Employment Practices Liability insurance for five (5) years following final acceptance of the work performed under this contract.

- G.3 LIABILITY.** These are the required minimum insurance requirements established by the District of Columbia. **HOWEVER, THE REQUIRED MINIMUM INSURANCE REQUIREMENTS PROVIDED ABOVE WILL NOT IN ANY WAY LIMIT THE CONTRACTOR'S LIABILITY UNDER THIS CONTRACT.**
- G.4 CONTRACTOR'S PROPERTY.** Contractor and subcontractors are solely responsible for any loss or damage to their personal property, including but not limited to tools and equipment, scaffolding and temporary structures, rented machinery, or owned and leased equipment. A waiver of subrogation shall apply in favor of the District of Columbia.
- G.5 MEASURE OF PAYMENT.** The District shall not make any separate measure or payment for the cost of insurance and bonds. The Contractor shall include all of the costs of insurance and bonds in the contract price.
- G.6 NOTIFICATION.** The Contractor shall immediately provide the CO with written notice in the event that its insurance coverage has or will be substantially changed, canceled or not renewed, and provide an updated certificate of insurance to the CO.
- G.7 CERTIFICATES OF INSURANCE.** The Contractor shall submit certificates of insurance giving evidence of the required coverage as specified in this section prior to commencing work.
- G.8 DISCLOSURE OF INFORMATION.** The Contractor agrees that the District may disclose the name and contact information of its insurers to any third party which presents a claim against the District for any damages or claims resulting from or arising out of work performed by the Contractor, its agents, employees, servants or subcontractors in the performance of this contract.

This contract, and any disputes arising out of or related to this contract, shall be governed by, and construed in accordance with, the laws of the District of Columbia.

SECTION H: GOVERNING LAW AND ORDER OF PRECEDENCE

H.1 GOVERNING LAW

This contract, and any disputes arising out of or related to this contract, shall be governed by, and construed in accordance with, the laws of the District of Columbia.

H.2 ORDER OF PRECEDENCE

A conflict in language shall be resolved by giving precedence to the document in the highest order of priority that contains language addressing the issue in question. The following documents are incorporated into the contract by reference and made a part of the contract in the following order of precedence:

- (1) An applicable Court Order, if any
- (2) Contract document
- (3) Standard Contract Provisions
- (4) Contract attachments other than the Standard Contract Provisions

- (5) RFP, as amended
- (6) BAFOs (in order of most recent to earliest)
- (7) Proposal

H.3 The following list of attachments is incorporated into the solicitation.

Attachment Number	Document
A	Master Facilities Plan Indicator
B	Department of Employment Services First Source Employment Agreement available at www.ocp.dc.gov click on "Solicitation Attachments"
C	Tax Certification Affidavit available at www.ocp.dc.gov click on "Solicitation Attachments"
D	U.S. Department of Labor Wage Determination [No. 2005-2103; 6/13/2011] available at www.wdol.gov

SECTION I: PROPOSAL ORGANIZATION AND SUBMISSION

I.1 This section outlines specific information necessary for the proper organization and manner in which Offerors' Proposals should be proffered. References are made to other sections in this RFP for further explanation.

I.1 Submission Identification

Submissions shall be proffered in an original and six (6) copies. The Offeror's submission shall be placed in a sealed envelope conspicuously marked: "Proposal for Public Education Facilities Master Plan."

I.2 Delivery or Mailing of Submissions

Submissions should be delivered or mailed to:

D.C. Department of General Services
 Attn: JW Lanum
 Bid Room - 3rd Floor
 2000 14th Street, N.W
 Washington, D.C. 20009
 Phone: (202) 727-2800

I.3 Date and Time for Receiving Submissions

Submissions shall be received no later than 2:00 pm E.D.T., on November 22, 2011. The Offeror assumes the sole responsibility for timely delivery of its Submission, regardless of the method of delivery.

I.4 Submission Size, Organization and Offeror Qualifications

All submissions shall be submitted on 8-1/2" x 11" bond paper and typewritten. Telephonic, telegraphic, and facsimile submissions shall not be accepted. The Office is interested in a qualitative approach to presentation material. Brief, clear and concise material is more desirable than quantity. The submission shall be organized as follows:

I.4.1 Bid Form

Each Offeror shall submit a bid form substantially in the form of **B.3 Cost Schedule**. Material deviations shall be sufficient to render the proposal non-responsive.

I.4.2 Executive Summary

Each Offer should provide a summary of no more than three pages of the information contained in the following sections.

I.4.3 General Team Information and Firm(s) Data

Each Offeror should provide the following information for the principal firm and each of its sub-consultants.

- A. Name(s), address(es), and role(s) of each firm (including all sub-consultants)
- B. Firm profile(s), including:
 - i. Age
 - ii. Firm history(ies)
 - iii. Firm size(s)
 - iv. Areas of specialty
 - v. Current firm workload(s) projected over the next six months
 - vi. Provide a list of any contracts held by the Offeror where the contract was terminated (either for default or convenience). This list should also identify any contracts that resulted in litigation or arbitration between the Owner and the Offeror. If the Offeror has multiple offices, only contracts held by the office submitting this proposal need be listed.
- C. Description of the team organization and personal qualifications of key staff, including:
 - i. Identification of the single point of contact for the Offeror.
 - ii. Resumes for each key participant on the team, including definition of that person's role, relevant project experience, and current workload over the next two years.

D. All information required in **Section J** for each evaluation factor.

I.4.4 Local Business Utilization Plan

Each Offeror must submit a proposed Local Business Utilization Plan that identifies the specific certified business enterprises that will participate in the contract and their anticipated roles. In addition, each Offeror should provide: (i) a narrative description of similar projects and the Offeror's success in meeting such goals; and (ii) a chart, in summary form, that identifies the Offeror's major public projects over the last five years and its success in achieving such goals (creativity should be displayed regarding joint-venture and subcontractor agreements).

I.4.5 Tax Affidavit

Each Offeror must submit a tax affidavit substantially in the form of **Attachment C**. In order to be eligible for this procurement, Offerors must be in full compliance with their tax obligations to the District of Columbia government.

I.5 Proposal Protests

Protests shall be governed by Chapter 47 of DGS's Procurement Regulations 27 DCMR. Protests alleging defects in this solicitation must be filed prior to the time set for receipt of submissions. If an alleged defect does not exist in this initial RFP, but was incorporated into the RFP by an amendment or addendum, a protest based on that defect must be filed before the next closing time established for proffering submissions. In all other cases, a protester shall file the protest within seven (7) days after the protester knows or should have known, whichever is earlier, of the facts and circumstances upon which the protest is based. All protests must be made in writing to the Office's Chief Contracting Officer ("CCO") and must be filed in duplicate. Protests shall be served on the Office by obtaining written and dated acknowledgment of receipt from the Office's CCO. Protests received by the Office after the indicated period shall not be considered. To expedite handling of protests, the envelope shall be labeled "Protest".

This section is intended to summarize the bid protest procedures and is for the convenience of the Offerors only. To the extent any provision of this section is inconsistent with the Procurement Regulations; the more stringent provisions shall prevail.

I.6 Proposal Costs

The District is not liable for any costs incurred by the offerors in submitting proposals in response to this solicitation.

I.7 Acknowledgment of Amendments

The offeror shall acknowledge receipt of any amendment to this solicitation (a) by signing and returning the amendment; (b) by identifying the amendment number and date in the space provided for this purpose in Section A, Solicitation, Offer and Award form; or (c) by letter, telegram or e-mail from an authorized negotiator. The District must receive the acknowledgment by the date and time specified for receipt of proposals. An offeror's failure to acknowledge an amendment may result in rejection of its offer.

I.8 Legal Status of Offeror

Each proposal must provide the following information:

- I.8.1** Name, address, telephone number and federal tax identification number of offeror;
- I.8.2** A copy of each District of Columbia license, registration or certification that the offeror is required by law to obtain. This mandate also requires the offeror to provide a copy of the executed “Clean Hands Certification” that is referenced in D.C. Official Code §47-2862, if the offeror is required by law to make such certification. If the offeror is a corporation or partnership and does not provide a copy of its license, registration or certification to transact business in the District of Columbia, the offer shall certify its intent to obtain the necessary license, registration or certification prior to contract award or its exemption from such requirements; and
- I.8.3** If the offeror is a partnership or joint venture, the names and addresses of the general partners or individual members of the joint venture, and copies of any joint venture or teaming agreements.

SECTION J - EVALUATION CRITERIA (Total 100 Points maximum)

The following factors will be used as the basis for evaluating responses to this solicitation. Consideration will be given to the proposed methodology and approach; relevant past performance, experience and subject matter familiarity; project team experience; and price.

Evaluation Criteria	Points
Factor 1 – Project Methodology and Approach	35
Factor 2 – Past Performance, Expertise, and Subject Familiarity	30
Factor 3 - Project Team	15
Factor 4 - Price	20
Total	100

Factor 1 – Proposed Methodology, Schedule and Level of Effort (35 Points maximum)

This factor includes the proposed methodology, schedule and approach to primary project tasks. Responses will be evaluated based on the completeness of the proposed methodology and its match to the Requirements in Section C.6.1 through C.6.7. A sample project plan and calendar blueprint as part of the RFP submission will improve selection chances.

For each of the tasks described at Section C.6.1 through C.6.7, the proposal should include the following:

- **Methodology.** This evaluation factor considers the methodology proposed for the task, including project plan and management, integration of key analytics, and proposed deliverables. The methodology should demonstrate how the respondent intends to complete the project and all deliverables successfully within the desired timeframes.

- **Schedule.** This factor considers the proposed schedule. Respondent should provide a detailed schedule including timeframes for major tasks such as community engagement, analytics and document development. If the proposed schedule for any deliverable deviates from the District's schedule at Section D.3 or there is proposed deviation from any other milestones contained herein, please indicate where and why the proposed schedule would be more effective.
 - The primary aim of this contract is that the MFP must be completed and released by November 2012 (to assist Offeror's in developing their responses an initial MFP blueprint developed by the District will be available no later than November 4, 2011).
 - The proposed schedule will be evaluated based on completeness of the plan including all major tasks, dependencies and critical path items. The plan must demonstrate how the respondent will meet the schedule required for a successful outcome (see overview of high level project calendar below).

Level of Effort. For each task at Section C.6.1 through C.6.7 and in connection with the methodology and schedule described above, the proposal should include a level of effort. The level of effort should reflect a proposed staffing plan and the proposed hours devoted to each task.

The methodology, schedule and level of effort components of the project plan should reflect a clear understanding of the nature of the work to be undertaken. Respondent should describe the tasks, activities, and methodologies that will be used to accomplish the work in an effective and timely manner. Potential risks and sensitive areas specific to the successful completion of a Master Facilities Plan should be outlined in this section and suggested risk mitigations for the challenges identified should be included in the proposal. Approaches that minimize the need for additional resources on the part of the Office of the Deputy Mayor for Education (DME) will be rated higher.

Factor 2 – Facilities and Planning Expertise, Past Performance and Experience (30 Points maximum)

This evaluation factor considers the project team's specific expertise related to the execution of a Master Facilities Plan of the scale and scope proposed in the District of Columbia or in similar projects within the past three (3) years. Responses will be evaluated based on the project team's demonstrated experience in education facilities planning, capital planning, community engagement, data analysis and deployment, and plan implementation. Respondents with a proven track record of experience with development of an education related Master Facilities Plan will be rated higher.

Evaluation of past performance and experience allows the District to assess the respondent's ability to perform and relevance of the work performed.

- Evaluation of this factor will be based on the quantity and quality of a respondent's performance on projects of comparable size, sample work products, and underlying analysis that support a Master Facilities Plan. The currency and relevance of the information, source of information, context of the data, and general trends in respondent's performance shall be considered. This factor also considers the respondent's performance within the last five (5) years in achieving a high degree of customer satisfaction through the completion of high quality work products and deliverables.
- The respondent should provide a list of three (3) previous contracts for which the respondent provided similar work within the last five (5) years. Please include the name of the client, title and

description of the project, contract number, dollar amount, and period of performance, name of the contact person and title, and telephone number and email address.

Factor 3 – Proposed Project Team (15 Points maximum)

This factor will be evaluated on the specific skill sets of the proposed project team including how well their individual qualifications and experience relate to this project.

- This evaluation factor considers the education, experience, knowledge, past performance, necessary skills and expertise of the personnel directly assigned to the project. The Respondent should indicate how the skill levels and expertise of the proposed staff relate to specific Requirements listed in Section C.6.
- Please provide resumes and qualifications of all project team members and indicate key or primary staff. If any project team members are not directly employed by the respondent, please explain the team member's relationship to the respondent.
- The respondent shall provide an organizational chart illustrating the proposed structure for the team, details of each team member's specific role, and which functions each team member will perform.

Factor 4 – Price (20 Points maximum)

Responses will be evaluated based on the cost structure to complete the Master Facilities Plan in the timeframe provided.

- The DME expects firm-fixed-price bids to cover completion of the Master Facilities Plan and all associated work and tasks. Bids should clearly define all assumptions and cost drivers for work associated with the bid and the total cost to successfully complete the Master Facilities Plan in the timeframe provided. If you propose a different cost structure or schedule, please state this clearly in your proposal.