

Santa Monica-Malibu Unified School District

RFP# 6.04

**REQUEST FOR PROPOSAL
FOR FACILITIES MASTER PLAN**

Released 7/29/05

Revised 8/2/05

Proposal Due Date:

September 12, 2005 at 4 pm

Deliver nine copies to:

Purchasing Office Attn: Virginia Hyatt
Santa Monica-Malibu Unified School District
1651 16th Street
Santa Monica, CA 90404
Tel: 310-450-8338 ext 249

For Copies of RFP and Related Documents:

www.smmusd.org under "District Information"

Submit questions on RFP in writing by August 21 to:

Alison Kendall, Principal
Kendall Planning & Design
2502 California Ave
Santa Monica, CA 90403 or
alison@kendallplanning.com

Mandatory Pre-Submittal Conference:

Wednesday, August 24, 2005

10:30 am-12:30 pm, Board Room, District Office

All questions received by August 21 will be answered at conference.

No questions will be answered after August 29.

Only attendees at pre-submittal conference will receive answers.

Finalist Interview Date:

Monday, September 26, 2005

9am-3pm

Board Room, District Office 1651 16th Street
Santa Monica, CA 90404

Santa Monica-Malibu Unified School District

REQUEST FOR PROPOSAL #6.04 FOR FACILITIES MASTER PLAN Released 7/29/05, Revised 8/2/05

The Santa Monica-Malibu Unified School District will be considering proposals to provide facility master planning services from qualified consultant teams to assist the School District with the preparation of a Facilities Assessment and comprehensive Master Plan to guide facilities planning and improvements for the next 20 years. The plan will address short and long term District goals and objectives and facilitate the Board of Education's ranking of priorities and consideration in future facility investments and improvements.

The District seeks a variety of master planning services including: Facilities assessment, space planning, enrollment projections, facilities management, meeting facilitation, survey design and analysis, conceptual design, preliminary cost estimating, and cost benefit analysis for options including remodeling, changes of use, new construction and new site acquisition. Consultants should have experience in facilities master planning for California educational facilities and in facilitating innovative and collaborative problem-solving.

The bulk of the community and District input to the Master Plan should be completed within the 2005-06 school year. A wide range of input from community members, the Cities of Malibu and Santa Monica, and District staff, teachers, parents and students is anticipated to identify issues and evaluate alternatives, as described in this RFP. The RFP is intended to provide a framework for proposals which identifies key issues, stakeholders and tasks. Respondents may propose alternative approaches which achieve similar goals by clearly identifying any changes from the scope of services in the RFP and the rationale for the proposed alternative approach, including time or cost savings.

OVERVIEW

The Santa Monica-Malibu Unified School District completed a Strategic Plan in June 2002 entitled, "Designing the Classroom of the Future." Included in this plan are seven initiatives, including "outstanding learning facilities" and "optimal class size." The desire to translate these and other related initiatives into a comprehensive and strategic plan for the District led to the decision to hire a consultant to conduct a Facilities Assessment and produce a Facilities Master Plan for the District.

Despite substantial upgrades to all school sites from previous bond measures, there remain areas in which district facilities should be improved to better meet the District goals as expressed in the Strategic Plan. The funding of these improvements is likely to require approval of a substantial facilities bond measure, probably for the 2006 ballot. The Facility Assessment would develop a database of current facilities and their characteristics, including joint use agreements with the cities of Santa Monica and Malibu and Santa Monica College. The Facilities Master Plan would examine the district's long term facility needs, develop policies and strategies for improving and managing District facilities to meet those needs, and identify priority projects for potential bond financing over the next 20 years.

FACILITIES MASTER PLAN GOALS

Primary goals for the Facilities Master Plan include:

1. Based on the District's 2002 Strategic Plan, and other District-wide initiatives, recommend and define the facilities needed to support and enhance the District's academic and other goals, and create a Facilities Master Plan to support and enhance the District's programs.
2. Complete an assessment of all District facilities and identify any deficiencies in existing buildings and sites, including program and service areas, utility systems and infrastructure, telecommunications and health and safety conditions.
3. Identify needs for additional, renovated or different facilities to accomplish District educational initiatives. Project future enrollment and facility needs based on demographic forecasts and curricular trends.
4. Identify & evaluate costs and benefits of a broad array of options to meet current and projected facility needs
5. Develop a facilities improvement project list to support a potential bond measure.
6. Define policies for long range facilities management, and define a strategy that addresses needs for short and long-term facility improvements and for capital investments to support the current and future educational programs including acquisition of new sites and construction of new facilities, future joint use governmental and community partnerships.
7. Define implementation steps necessary to fulfill the needs identified, coordinating the identified scope of work with funding resources and creating a 10-year Planning Schedule for the work to be done District-wide.

SCOPE OF SPECIFIC DESIRED SERVICES:

PHASE 1. COMMUNITY INVOLVEMENT IN FACILITIES MASTER PLAN PROCESS

An important component of the Facilities Master Plan will be an extensive community involvement process to engage District staff, parents, teachers and the community in identification of issues and needs and evaluation of options, proposals and priorities.

Phase 1 includes determining the overall process to engage all the key stakeholders and then developing a meeting schedule and coordinating with the relevant agencies to confirm meeting times and agendas. Outreach activities and meetings will occur throughout the process, approximately as shown in the matrix below, in order to provide key input throughout the planning process. Consultants may propose alternative methods to obtain a similar level of input, such as combining groups, having District staff conduct some outreach, or obtaining some input by survey rather than interview or meeting.

TASK 1.1: Develop community involvement process to engage various types of stakeholders in assessing facilities needs and developing facilities master plan, including types of meetings, surveys or other outreach efforts, timing, purpose and general format. Scope should include an allowance for additional meetings if deemed necessary by the Board of Education or District Project Manager. Phase 1 and 2 can proceed concurrently.

Key stakeholders to include in the Facilities Master Plan Process:

District Staff and Officials

SMMUSD Administrators via Full or Senior Cabinet meetings
Board Appointed Committees and District Advisory Committees
SMMUSD Teachers and Classified Personnel, Bargaining Unit Leadership
Assistant Superintendent for Fiscal & Business Services (Project Management)
Head of Facilities Management (Project Management)
District Facilities Ad Hoc Committee
School sites through Site Governance Councils, "Site Plans" and Principal Interviews
Board of Education

Preferred methods of input: Policy discussions at key points at School Board meetings, Full Cabinet meetings with district administrators and other regularly scheduled meetings. Detailed discussion of facility options at District Facilities Ad Hoc Committee meetings and with Board Facilities committee if created for bond measure. Questionnaires to identify facility needs and top 5 priorities for Site Governance Councils, School PTAs and District Advisory Committees to complete.

Users of Specialized Facilities

Child Development Services staff: preschool, after school, District and City
CREST

Music, performing arts, and visual arts instructors
Humanities, Science, math and language teachers
Librarians, Technology managers & instructors
Athletics/Physical Education instructors
Special Education staff & DAC
Spanish language Immersion programs

Preferred methods of input: Questionnaires on facility needs, relevant DAC meetings to review specialized facility requirements, review and comment on administrative draft assessments & plan

Current and Potential Governmental and Community Partners

City of Santa Monica - City Manager, Planning Director, Cultural Services
Director

City of Malibu - City Manager, Planning Director, Parks & Recreation Director

Santa Monica College

Chambers of Commerce

Non-profit Youth Services Organizations

Preferred methods of input: Meetings with key City leadership including relevant Commissions to identify possible options, develop strategies for new facilities, briefings to Commissions or Councils, community meetings on options and draft plan.

Students, Advocacy Groups & Community Groups Supporting Schools

Parent Teacher Student Associations, including student representatives

Education Foundation of Santa Monica & Malibu

Minority and economically disadvantaged student & parent groups

Race & Discipline Task Force

Special education students & parents

Neighborhood Associations (invite to community-wide workshops, or specific topics such as traffic, parking and neighborhood use of school sites)
Preferred methods of input: questionnaires or surveys, meetings to discuss issues and possible facility implications, at least two community-wide workshops to discuss issues and options, second to discuss proposals & priorities, public comment on draft plan

TASK 1.2 Schedule and Materials for District and Community Involvement

Develop a detailed schedule for District and community involvement which shows key meetings in relation to completion of draft or final documents, the major phases and the types of input solicited from various groups. At a minimum, the schedule should include the following types of meetings for District and community input into the process. District staff will provide public noticing required under the Brown Act and assist with agenda coordination with other public agencies

Deliverables: Proposed schedule for District and community involvement, showing all proposed district, community and public agency meeting dates. Draft and final presentations, meeting materials, and summary notes will be provided for all meetings by end of each phase. Where surveys are proposed to evaluate facility needs, consultant will provide draft and final survey and analysis of results.

*Meetings: Facilities Ad Hoc Committee (2)
 Facilities Project Management (3)
 District Cabinet
 Board of Education (to approve outreach process)
 As shown below by phase or as otherwise proposed to obtain input.*

DISTRICT, COMMUNITY & PUBLIC AGENCY INVOLVEMENT PROCESS					
Number in each column represents number of meetings with group in each phase					
District, Public Agency or Community Group:	Phase 1: Involvement Process	Phase 2: Assessment	Phase 3: Issues & Needs	Phase 4: Plan Proposals	Phase 5: Implementation
Board of Education	1 meeting	1	1	2	2
Teachers & Classified staff		1		1	
District Cabinet Meetings	1 meeting	1	1	1	1
Facilities Ad Hoc Committee	2 meetings	2	2	3	2
Facilities Project Mgt	3 meetings	2	2	3	2
District Advisory Comm.			16		
Site Governance Councils/PTSAs			16	16	
Community-wide Workshops			2	2	
City Staff (City Managers, Comm. Services & Planning Directors)	2 meetings				2
City Commissions				4	
City Councils (SM, Malibu)				2	

PHASE 2. FACILITIES ASSESSMENT

TASK 2.1: Inventory Existing Facilities

Facilities Planning Team shall prepare a digital data base of all existing School District properties, including location, land area, site improvements, topography, square footage by use, and specialized facilities. Database will draw upon existing District inventories and information, and supplementing with additional site assessment where needed. Data base shall include location maps and site plans showing adjacent areas for all sites. Building plans shall be included where available. Databases will include fields for noting any facilities deficiencies, maintenance or management plans, and other issues. Note: Phase 1 and 2 can proceed concurrently.

Deliverable: Data Base including plans for each school site and district property, facility inventory and condition assessment.

(Preferred software shall be established in consultation with District Staff: Generally prefer standard MS Word/Excel software. Plans from recent facility upgrades are available in AutoCAD or other formats, but plans and maps of facilities should also be available in PDF form for space assignment and other routine use. Ability to reference or link to City of Santa Monica OPIS/GIS and City of Malibu GIS systems would be desirable.)

TASK 2.2: Identify facilities not directly related to the District's core educational mission and evaluate management options, including criteria such as revenue generation and future use flexibility.

The District owns a number of properties not used for school district purposes, including the Doubletree Hotel at Lincoln and Olympic, commercial space on 16th Street, vacant land in Malibu, and underutilized facilities such as Washington West. Consultant should review current uses and revenues from these facilities and suggest options for their use and management for incorporation into Plan.

TASK 2.3: Identify safety, security, noise and environmental pollution issues and mitigations All school sites and facilities should be assessed and any safety, security, noise or pollution hazards identified. Possible measures to reduce hazards should be identified including both facility improvements and management approaches.

TASK 2.4 : Evaluate building and utilities infrastructure condition and energy efficiency The electrical, heating and ventilation, mechanical, telecommunications, water and sewer and security systems at each district site should be inspected to identify general condition, remaining economic life, deferred maintenance, and potential for energy conservation or improved cost efficiency. Identify potential improvements to current level of energy and resource conservation through modifications to utilities infrastructure for evaluation under Plan Proposals.

TASK 2.5: Identify current areas of facility and space deficiencies All facilities should be documented by school site or address and any deficiencies identified with the help of surveys or interviews with on-site staff and facilities managers. Deficiencies should be noted in the data base by school site and prioritized. Space needs surveys and room utilization studies should be developed for completion by District staff provide objective information in determining current space usage.

Possible types of deficiencies and areas likely to require special attention include:

- Playfields and athletic facilities
- Music rehearsal rooms and facilities – acoustics and storage
- Science and language classrooms and laboratory facilities
- School size and total enrollment by school site: evaluation should include capacity evaluation of playground, auditorium and related facilities per student
- ADA Americans with Disabilities Act Compliance
- Special Education facilities: physical & occupational therapy, learning center
- Other legal requirements: Williams Decree
- Information System Infrastructure- adaptability to future communication technologies.
- Preschool and afterschool program facilities
- Child Development Services administrative space
- Educational Services, currently not able to be housed at District Offices

TASK 2.6: Assess parking and transportation needs for students, staff and school deliveries Most district facilities have minimal parking facilities and are located in neighborhoods already concerned with parking and traffic impacts. Both Santa Monica and Malibu High have unmet parking demand from student drivers, teachers and staff, visitors and volunteers which spills into adjacent neighborhoods. Increasing the number of students and staff walking, biking, carpooling and using transit could reduce both traffic generation and parking demand.

TASK 2.7: Assess food services needs and issues Innovative, healthy and cost effective approaches to providing food services and their facility and transportation implications should be identified and compared with current food services systems in order to support recommendations.

TASK 2.8: Assess existing Joint Use Partnerships Facilities currently or potentially available for district use under current Joint Use Agreements with the City of Santa Monica and with the City of Malibu should be inventoried. Recommendations regarding administration of these programs and their potential to fulfill additional facilities needs should be included.

TASK 2.9: Draft Facilities Assessment All information from Phase 2 on existing facilities, their condition and identified deficiencies shall be summarized into a Draft Facilities Assessment & Database, including maps and plans of all school sites and District properties, for inclusion in the Draft Facility Master Plan.

*Meetings: Teachers & Classified Staff/Bargaining Unit Leadership
District Cabinet
Facilities Ad Hoc Committee (2)
Facilities Project Management (2)*

Deliverables: Draft Facilities Assessment

PHASE 3: FACILITIES MASTER PLAN: ISSUES & OPTIONS

TASK 3.1: Articulate key goals and guiding principles of the Facilities Master Plan

Based on policy direction from the District Administration, Board of Education and Facilities Ad Hoc Committee, the consultant shall articulate key goals for the Facilities Master Plan and develop a set of guiding principles as a framework for the Facilities Master Plan. Among key goals for the Facilities Master Plan are:

1. Link District educational objectives & initiatives to facilities needs
2. Project future enrollment and facility needs based on demographic forecasts and other trends
3. Identify & evaluate costs and benefits of a broad array of facility options
4. Guide long range decision-making on facilities management, including acquisition of new facilities
5. Provide facilities improvement project list to support major bond measure
6. Guide potential future joint use agreements and community partnerships

TASK 3.2: Determine Facility Needs Associated with Strategic Plan Initiatives

The District completed a strategic plan in 2002 entitled, "Designing the Classroom of the Future-Excellence in Learning and Equality of Opportunity," which identified seven Strategic Plan initiatives. Consultant shall review the initiatives and shifts in priorities and timetables which have occurred since, and determine additional or improved facilities needed to achieve these initiatives. Specific tasks to address each of the Strategic Plan initiatives are included below within this major task. The Strategic Plan initiatives include :

1. Abundant Resources, including increasing funding and outstanding learning facilities
2. Curriculum
3. Differentiated Instruction
4. Equity & Equality of Education
5. Optimal Classroom Size
6. Schools as Community Centers
7. Universal Access to Quality Early Childhood Education, Family Support & After School Care

Initiative 1: Abundant Resources

1a. Increase Unrestricted Funding

Major recent source of unrestricted funding has been from the City of Santa Monica and to a lesser degree, the City of Malibu, in the form of financial contributions from the Cities in return for community use of District facilities. The corresponding Joint Use Agreements require active management from both parties, and imply commitments of resources to managing and maintaining facilities to meet standards of partner organizations, such as City field specifications. Two current Parcel Taxes provide additional funds, one of which expires in 2008, the other in 2010.

TASK 3.2.1: Identify current and potential joint use governmental and community partnerships.

Describe current joint use commitments, suggest best ways to manage and utilize joint use facilities, and identify any potential for future joint use agreements or community partnerships. Explore possibility of using expanded community partnerships to fulfill

District facility needs. Possible partners to contact include Santa Monica College, Pepperdine University, Malibu and Santa Monica Chambers of Commerce, and the Cities of Santa Monica and Malibu.

New partnerships to extend learning opportunities beyond traditional classrooms and programs to facilitate transition from high school to college through partnerships with SMC, UCLA, USC, etc. should also be identified as they relate to facility options.

1c. Outstanding Learning Facilities

Assess needs for new facilities to incorporate new technologies, especially in sciences, language, arts and other evolving fields.

TASK 3.2.2 Identify opportunities to provide outstanding learning facilities for all District programs. Look at more efficient use of scarce land resources: parking beneath fields or classroom buildings, multi-use buildings, year round programs

Initiative 2. Curriculum

TASK 3.2.3: Consider current trends in public school curricula, state and federal requirements, new teaching technologies and other curriculum influences requiring specialized or additional facilities in the Facilities Master Plan.

Major District curriculum objectives include efforts to assure that all students have access to math, science and second language classes needed to meet the A-G requirements for admission to the UC and Cal State University System. The AVID program to assist disadvantaged students in preparing for college requires expansion to help students take on this challenge. Shortages of classroom and laboratory space in middle and high schools currently limit the ability to meet this goal.

In addition to expanding the numbers of students meeting this minimum college preparation standard, the District hopes to continue to increase the quality and accessibility of its arts and athletic programs. It also hopes to expand its current Advanced Placement or honors courses curriculum and supplement it with programs such as the IB (International Baccalaureate) program and advanced programs for students who are proficient in another language. Consultant should examine other trends and possible changes in curriculum which might affect facility needs, such as Small Learning Communities, standards based education, etc.

Initiative 4. Equity & Equality

This Initiative describes goal of equipping all students to succeed at the university level upon graduation, especially those of low socio-economic status, students of color, students with disabilities and those who have historically experienced marginalization. The district initiatives to expand college preparation courses in math, science and second languages above relate direction to this objective and are impacted by lack of classroom and laboratory space. Program suggestions include extension of programs like AVID and project Reach, partnerships with non-profit community agencies, expanded preschool classes, parent education and other programs, many with facility related requirements and some with after school, evening or summer scheduling potential.

TASK 3.2.4: Identify facility needs associated with programs to assist disadvantaged students and suggest possible locations and operating schedules for such programs and facilities.

Initiative 5. Optimal Classroom Size

Facility Master Plan should identify options and priorities for both reducing class size and overall enrollment per school site, as discussed below.

Enrollment Projections

Recently, District enrollment by Santa Monica residents has been growing, leading to a decrease in the number of approved permits for inter-district transfers. New housing construction has included new multiple family units and single family remodeling in Santa Monica and limited amounts of single family homes in Malibu. Complex socio-economic and demographic changes may affect enrollment over the next ten to twenty years. Anecdotal evidence suggests that while some families are being driven out of the district by high housing prices, others are moving here for access to better schools.

TASK 3.2.5: Examine relevant demographic factors and trends in order to project likely enrollment trends and key variables which might lead to various enrollment scenarios. Examine financial and enrollment implications of out of district and inter-district transfer permits on facility needs and school crowding. Review current and proposed school boundaries and evaluate potential of minor adjustments to boundaries or permit levels to address crowding.

Smaller Learning Communities; Middle & High School Size

Particular concerns exist about the large size of Santa Monica High School, at over 3500 students, and at John Adams and Lincoln Middle Schools, with roughly half that number each. Several of the Santa Monica elementary schools exceed optimum size as well. Efforts to create smaller learning communities within these schools have been initiated, but may require additional facilities changes to enhance the feeling of community and provide administrative and teacher meeting space to support the smaller semi-autonomous “houses” at Samohi or multiple “cores” within each grade level at Lincoln. Possibly another high school site could be located within Santa Monica to relieve overcrowding on the Samohi campus by accommodating approximately 600 students.

TASK 3.2.6: Identify facilities needs associated with implementing smaller learning community redesigns at Santa Monica High, Lincoln Middle and John Adams Middle Schools .

Optimal Classroom Size

Due to budget constraints, most classrooms exceed optimal class size except those benefiting from the recent statewide class size reduction program for K-3rd grade. The district aims to provide optimal classroom sizes for the age, level and specific curriculum needs. A full range of options to achieve optimal classroom size should be identified. This could include, for example, establishing some sites that include K-8 , K-12, or PreK-3 in addition to the current grade level groupings at a single site.

Initiative 6. Schools as Community Centers

TASK 3.2.7: Examine facility needs to strengthen role of schools as Community Centers, especially at middle and high school level

Neighborhood elementary schools have historically acted as community centers for the various neighborhoods, reinforcing a sense of community by having the majority of the students living within walking distance of the school. This neighborhood school orientation facilitates a high degree of parent volunteer involvement, and has positive impacts as diverse as reducing traffic impacts and improving neighborhood safety and community involvement. The much larger middle schools experience less of these benefits, and the high schools have even less of a clear “community center” role, despite their potential to fill such a role. The viability of this concept depends upon an adequate level of operational funding, and close coordination with City programs and other community service organizations. Existing programs which have reinforced the role of

schools as community centers include Santa Monica's playground partnership, and community outreach programs offered in school facilities for youth and families such as recent Youth Planning Project and Anti-Gang Violence Workshops in Santa Monica.

Initiative 7. Early Childhood Education, Family Support, After School Care

Previous bond measures have not really addressed the District's preschool or Child Development Services space needs. Currently, after school care is available at all Santa Monica elementary schools. The District runs CREST for grades K-3 and the City provides grades 4 and 5. Elementary CREST suffers from a severe space shortage, with many sites lacking dedicated space for CREST. Teen Centers are available at both Santa Monica middle schools, and the Malibu Boys & Girls Club provides programs as well. A number of other community organizations (YMCA, Boys & Girls Club, CREST, Police Activities League) provide after school programs for young people. Some classes for parents on children's development, educational and other issues are offered at school sites, but this role could potentially be expanded. Innovative projects that support development of positive character traits as well as academic success by supporting both families and individual students should be considered.

TASK 3.2.9: Examine current and potential programs and facility needs and solutions, including coordination of transportation from school sites to after school programs.

Recommendations for specific facilities improvements were identified in the Strategic Plan including the Washington West renovation and establishment of a Samohi Teen Center.

TASK 3.3: Identify facility needs are associated with emerging District programs Several new district programs have associated facility needs, which need to be considered in the Facilities Master Plan. Many of these programs grew out of the Strategic Planning initiatives, and include:

- New Community Day School (high school age)
- Expand Preschool Facilities
- Arts Master Plan
- Santa Monica High Redesign (related to Smaller Learning Communities initiative)
- John Adams Middle School reorganization and AVID expansion (related to smaller learning communities and Equity and Equality initiatives)
- Special Education Strategic Plan (related to Equity and Equality initiative)
- Other new programmatic and curriculum initiatives as identified by the District

PHASE 3: MEETINGS & DELIVERABLES

- Meetings:**
- Board of Education*
 - District Project Management*
 - Facilities Ad Hoc Committee (2)*
 - Site governance Councils (16)*
 - District Advisory Committees (16)*
- Deliverables:** *Summary of facility needs and issues*

PHASE 4: DRAFT FACILITIES MASTER PLAN PROPOSALS

TASK 4.1: Proposals for Renovation or Additions to Existing Facilities

Given the limited availability and high cost of land and facilities, the majority of recommendations are likely to focus on renovation or addition to existing facilities to better meet current and future District needs. These recommendations may include measures to make facilities more multi-purpose or adaptable from one use to another. Proposals should clearly identify the costs of renovations or additions, and the potential for new or increased use, efficiency or other benefits expected from the projects.

Facilities Master Plan proposals shall incorporate lessons from previous facilities improvement efforts (Prop X, Y and ES) for undertaking large planning and building programs, as well as generating voter support for the schools. The Prop X report identifies some specific lessons to incorporate into future efforts, including references for design standards for school facilities. The Facility Plan should incorporate these and propose specific approaches to some of the perennial challenges including:

- Project Management
- Cost Containment
- Community Involvement
- Site Level Coordination
- Ongoing Facilities Planning
- Facility Design Standards

TASK 4.2: Infill Proposals and Best Practices for New Facility Construction

All Santa Monica schools and some of the Malibu schools are located on fully developed sites in residential neighborhoods. Many of the schools already contain some two story classroom buildings and have less playfield and open space than desirable for their enrollment. Consultant should explore options for more efficient “infill” development at existing sites, including vertical stacking of different uses, underground or structured parking or storage, and other options. New construction should be accompanied by efforts to reduce the architectural scale and traffic, noise and other impacts of construction and permanent new activities. The Facilities Master Plan will examine and propose “Best Practices” for integrating new construction into densely developed urban areas on school sites which are often already heavily developed. Included in these practices might be traffic mitigation measures, landscaping standards and other efforts to offset impacts on surrounding neighborhoods and the school environment.

TASK 4.3: Increase Sustainability and Energy/Resource Conservation Potential

Facility assessment should identify potential improvements to current level of energy and resource conservation and overall sustainability and potential for additional sustainability improvements in existing buildings, remodeled facilities and new facilities. Best Practices including “CHPS - High Performance Schools,” LEED certification and City of Santa Monica Green Building practices should be used in planning and design of remodeled and new facilities.

TASK 4.4: Identify Potential for Site or Facility Acquisition

Identify areas and needs for acquiring additional land and/or facilities. Identify potential sites and provide an estimate of acquisition costs through lease or purchase plus facilities improvement and operational costs. This effort should include City officials in the City of Santa Monica, where space needs and overcrowding are most acute. Identification of a site for another high school or other facilities strategies to address

middle and high school overcrowding is a high priority for this task, and several potential school sites along the Olympic Boulevard corridor should be included.

TASK 4.5 Develop safe, cost effective and sustainable approaches to meeting transportation and parking needs.

Consultant should prepare an assessment of parking and transportation needs, building upon information on current parking and transportation systems in Phase 2, supplemented by site specific information collected by survey or interview. Consultant should review relevant City transportation policies and projects with City of Santa Monica and Malibu public works and planning staff. Transportation and parking management plans should be developed to meet essential District needs. Measures to reduce parking demand and traffic impacts while meeting access needs should be incorporated, including promotion of walking, biking, carpooling and taking transit. Plan should identify the respective roles of District-funded facility improvements or transportation programs and ongoing efforts by Site Governance Councils on parking & traffic management and community liaison.

TASK 4.6: Present Proposals with Cost/Benefit Assessment and Information on Population Served

To aid in prioritizing the recommendations for bond funding and implementation, each proposal should be justified in relation to objectives in the District strategic plan or other policy document and presented with a brief cost/benefit assessment which estimates all associated costs of a proposal, including construction costs, project management, dislocation and ongoing operating costs. Where there are a range of options to address a specific need, they should be identified.

TASK 4.7: Identify District “Potential Project List” for possible partnerships or agreements with major public or private development projects.

Many school district facilities are in areas where major public or private development projects are expected to occur, and substantial opportunities for public/private partnerships or joint development exist which could address severe space deficiencies. For example, major projects near Santa Monica High School include improvements to the Civic Center area. By developing a pro-active potential project list and an awareness of specific major projects, the school district can help to identify improvements which can serve District and public needs.

TASK 4.8 Administrative and Public Draft Facilities Master Plan Document

The various policies, strategies and specific proposals described above shall be incorporated into a Draft Facilities Master Plan document. The Master Plan will provide both broad policies and strategies and, where appropriate specific proposals which may include renovation, additions, changes of use, new site acquisition, new construction, joint use, changes in management or operations or additional planning and design. Where District staff and the Facilities Ad Hoc Committee have identified alternative approaches to an issue, these shall be included to allow future flexibility.

*Deliverables: Administrative Draft Facilities Master Plan
Public Draft Facilities Master Plan*

*Meetings: Full Cabinet (Senior District Administration)
Teachers & Classified staff, Bargaining Unit Leadership
District Facilities Plan Project Management (2)
Facilities Ad Hoc Committee (2)*

TASK 4.9 Board of Education Review and Direction on Plan Proposals

An essential task at the culmination of this phase is Board of Education direction and public input on the specific proposals in the Draft Facilities Master Plan. While the policies and proposals could be presented for community and Board review prior to preparation of the Draft Master Plan, the need to put all proposals into a District-wide framework suggests the release of the Draft document as the basis for community review.

*Deliverable: Newsletter Summary of Draft Facilities Master Plan
Presentation and Materials for Prioritization by Board
Presentation and Materials for Community Workshop
Prioritized & Amended Draft Facilities Master Plan*

*Meetings: Board of Education
Site Governance Councils with PTSAs (16)
Community Wide Workshops (2-one in Malibu, one in Santa Monica)
City Commission Hearings (4, probably Planning & Community Services
in both cities)
City Council Hearings(2, one in Santa Monica, one in Malibu)
Facilities Ad Hoc Committee (1, direction after public comment)
District Facilities Plan Project Management (1, direction after public
comment)*

PHASE 5: ADOPTION AND IMPLEMENTATION

The final phase of the Master Plan process includes adoption and implementation. Decisions about the specific tasks and scope of each of the following tasks will depend upon the Board review and direction on the Draft Master Plan prepared in Phase 4. Possible tasks are described below. Proposers are requested to make a separate proposal for this phase, with the understanding that the scope may change depending upon Phase 4 review.

TASK 5.1: Prepare proposed project list for potential Facilities Bond Measure, coordinating with District staff and financial experts.

Consultant will review Plan proposals with Facilities Ad Hoc Committee and Board of Education and prepare a draft project list for a Facilities Bond Measure, incorporating advice on bond packaging from District Financial Advisor and CFO. The District will be consulting experts on bond issues and on packaging bond measures during this process. Their expertise shall be incorporated into the Facilities Master Plan in order to help the document function as a support to future bond measures.

The Facilities Bond Measure is expected to identify specific projects and provide cost estimates for those projects. Because the measure is intended to fund long term planning and facility improvement projects, the measure may need to combine clearly defined projects and categories of funding or types of projects including future planning, site acquisition, design and environmental review.

Deliverables: Draft and Revised Project List

Meetings: Board of Education for Project List approval

TASK 5.2 Prepare CEQA Environmental Review

The proposed Facilities Master Plan will combine broad policies and strategies for the management of District facilities with recommendations for specific actions such as acquisition, renovation, new construction, joint use and management of facilities including parking. Such actions may have potentially significant environmental impacts and thus be subject to environmental review requirements of the California Environmental Quality Act. In most cases, these actions will require additional approvals and potential environmental impacts of specific actions can be assessed and mitigated upon design and approval of specific facility improvement projects or subsequent plans, if required.

Consultants responding to the RFP are requested to propose one or more time and cost-efficient approaches to fulfilling CEQA environmental review requirements for public review, adoption and implementation of the Facilities Master Plan. These might include concurrent planning & environmental review, incorporating mitigation measures in the plan, early consultation with affected agencies, evaluating impacts at the program level, and/or deferring analysis of some issues until subsequent approvals of specific projects.

The consultant may be requested to prepare all documentation needed to comply with CEQA environmental review requirements to identify potential environmental impacts of adoption of the Facilities Management Plan. Documentation might include: Initial Study, Notice of Preparation and Initial Scoping for an EIR or Mitigated Negative Declaration,

Preparation of Draft Environmental Impact Report, response to Public Comments on the DEIR, Mitigation Monitoring and Reporting Program, and preparation of a Final EIR.

Deliverables: CEQA Review Documents

*Meeting: Facilities Ad Hoc Committee (1)
District Facilities Project Management (1)*

TASK 5.3 Adopt Facilities Master Plan

Consultant would incorporate any changes to the plan in order to incorporate mitigation measures or to reflect specific implementation actions and priorities identified by the Board or District, including potential bond measures to fund facilities improvements.

Deliverable: Facilities Master Plan for Adoption by Board

*Meeting: District Cabinet Meeting
Facilities Ad Hoc Committee (1)
District Facilities Project Management (1)
Board of Education for Adoption of Plan*

GENERAL INFORMATION ON PROPOSAL SUBMITTAL

TYPE OF CONTRACT

The School District is interested in entering into a negotiated “lump sum” contract for planning services. Strict adherence to the budget limitations will be required, and budget limitations will be established for each phase of the work.

1. Community Involvement
2. Facilities Assessment
3. Facilities Needs & Issues
4. Facilities Master Plan Proposals
5. Implementation: Facilities Bond Measure

The School District reserves the right to negotiate the scope, schedule and cost of any proposal submitted and enter into a contract based on a revised proposal.

FORM OF SUBMITTAL

Proposals submitted must be presented in the following format. Proposals that do not follow this format will not be considered.

- Section 1 Brief history of the prime consultant firm
- Section 2a Chart showing major components of the firm’s organization, including the names of individuals in key positions.
 - 2b Program organization chart-including the names of individuals to be involved in this program. Include resumes/qualifications/relevant experience of these individuals. Specifically, include the employment history of these individuals with this specific firm.
 - 2c The names of firms and individuals that will perform any subconsultant work for your firm (i.e. outside firms providing cost estimating, planning, architectural design, structural, mechanical or electrical engineering services) Provide resumes/qualifications/experience of each person to be involved in the program. Include a list of the in-house design disciplines your firm provides.
- Section 3a References- the name, address, phone number of five previous clients for similar projects. Provide a list of references for projects which your firm, including your subconsultants, have performed collectively.
 - 3b Lists, photos, literature on related similar projects done by the individuals listed in sections 2b and 2c. Do not include projects completed by other branch offices or by individuals that are not part of the proposed program organization chart.
 - 3c. List the assignments where your firm has experience in facilities planning for multiple or large sites or in designing multiple projects at the same time for a single client. Provide a description of two or three of these assignments completed within the last ten (10) years.
 - 3d. List the assignments where your firm has experience working for construction managers on projects in the State of California. Provide a

description of two or three of these assignments completed within the last ten(10) years.

- Section 4 Your firm's recommended or specific approach for accomplishing each item in the section "Scope of Specific Desired Services".
- Section 5 In is the intent of the School District to complete the Facilities Assessment and Master Plan and the Draft Project Description for a Facilities Bond Measure within the 2005-06 school year, on a schedule which would allow inclusion of a facilities bond measure on the November 2006 ballot. Provide a detailed schedule for the work and demonstrate your firm's ability to meet this schedule. Include the timing of environmental review, public review of the Draft plan and environmental documents, and actual adoption of the Facilities Master Plan, which may extend into the following school year if necessary.
- Section 6 Describe how your firm manages and controls planning & design costs, prevents project scope increases and is able to provide the highest quality design & planning in relation to fees.
- Section 6a Provide other supplemental information that is not specifically addressed in previous sections which would indicate your firm's qualifications for this project.
- Section 7 Provide a probably fee breakdown for each of the five phases of the project, as identified in the scope of services.

PRE-SUBMITTAL CONFERENCE

A presubmittal conference for interested firms is scheduled for **Wednesday, August 24 2005 from 10:30 am – 12:30 pm** in the Board Room of the Administration Building at 1651 Sixteenth Street, Santa Monica, CA. Attendance at this conference is strongly recommended.

PROPOSAL SUBMISSION

Nine (9) copies of the proposal, spiral bound, should be submitted to:

Virginia Hyatt, Purchasing Director
Purchasing Office
Santa Monica-Malibu Unified School District
1651 16th Street
Santa Monica, CA 90404
(310) 450-8338 ext 249

Proposal must be received by **4:00 p.m. on Monday September 12, 2005.**

PROPOSED REVIEW & SELECTION PROCESS

District staff and consultant will review all submitted proposals. After this review, staff may select three to four firms for follow up interviews. These interviews may include members of the District Facilities Ad Hoc Committee as well as district staff and a consultant assisting with the RFP and consultant selection process.

SELECTION CRITERIA

While relative weight given to specific criteria is not determined, the following criteria will be considered by the Selection Committee. Qualifications and relevant experience in producing similar types of plans for similar clients and settings shall be extremely important in the selection process.

- Experience with school facility planning and design
- Familiarity with best practices in sustainable design and planning of school facilities. Including High Performance School design practices.
- Ability to cost effectively provide high quality planning and design services.
- Skill in facilitating complex community and District involvement process
- Ability to complete the planning tasks within the 9 month time frame needed to put a facilities improvement bond on November 2006 ballot.
- Creativity in problem solving in design and planning in similar urban settings
- Ability to accurately estimate scope of facilities design and construction work and associated costs
- Ability to work with City staff and elected officials to address concerns about District facility plans, projects and ongoing operations.
- Familiarity with the Santa Monica Malibu Unified School District's programs and facilities, and with relevant local planning and school policy issues in Malibu and Santa Monica.

RIGHTS OF SELECTION AND ASSIGNMENT

The District reserves the right to : (1) select one or more firms for this work; (2) assign a specific project or aspect to a specific firm (3) assign the contract to another firm for project management purposes; and (4) assign to one or more firms one of more of the following components: 1) Community Outreach, 2) Facility Assessment 3) Facility Needs and Issues 4) Facility Master Plan Proposals 5) Implementation/ Draft Bond Measure Language and 6) Environmental Review.

Any questions related to this RFP should be submitted in writing to Alison Kendall, Kendall Planning & Design, 2502 California Avenue, Santa Monica, CA 90403 or by Email: alison@kendallplanning.com. Questions received by August 21 will be answered at the mandatory pre-proposal conference on August 24, 2005. No questions will be answered after August 29.

TENTATIVE TIMELINE FOR RFP RELEASE & CONSULTANT SELECTION

DATE	GROUP	TASK
July 28, 2005	Board of Education	Approve Final RFP
July 29, 2005	Business Services	Release of RFP
August 21, 2005	Email: alison@kendallplanning.com	Deadline for Questions
August 24, 2005 10:30 am	All Respondents (Mandatory)	Pre-Submittal Conference
September 12, 2005	CFO, Facilities Mgt., KPD Selection Committee	Proposals Due, Ratings Proposal Review
September 26, 2005	Staff, Ad Hoc Committee, KPD	Finalist Interviews 9am-3pm Respondents please reserve
End September	Selection Committee KPD, Staff	Select consultant Check references Finalize scope & contract
October 2005	Board of Education	Allocate Master Plan funds Approve consultant contract

TENTATIVE FACILITIES MASTER PLANNING SCHEDULE

November 2005	Planning Team	Phase 1. District and Community Outreach
Nov-Dec 2005	Planning Team	Phase 2. Facilities Assessment
Jan-March 2006	Planning Team	Phase 3. Needs & Options
April-May 2006 June 2006	Planning Team Community meetings Board of Education	Phase 4. Plan Proposals Public Review of Draft Plan Direction on Draft Plan
Summer 2006	Planning Team	Phase 5. Implementation/ Refine Costs, CEQA Review
Fall 2006	Board of Education	Review/Adopt Master Plan

FACILITIES AREA SURVEY SUMMARY				
School/Facility	Classrooms	Permanent Buildings-SF	Relocatable Buildings SF	Total SF Area at School Site
Cabrillo	25	32,714	3840	36,554
Edison	27	27,770	16,264	44,034
Franklin	45	59,568	10,864	70,432
Grant	34	54,474	5,760	60,234
McKinley	33	54,531	8,640	63,171
Muir/SMASH	31	47,155	3,840	50,995
Point Dume	20	32,578		32,578
Rogers	38	48,357	5,760	54,117
Roosevelt	41	49,321	9,600	58,921
Webster	24	31,494	2,880	34,374
Adams Middle	58	130,093		130,093
Lincoln Middle	56	152,163		152,163
Malibu High	60	142,248	2,880	145,128
Santa Monica High	144	417,577		417,577
Olympic High	16	35,493		44,421
Lincoln Child Care Center	2	4,945	8,928	4,945
Washington East	7	8,572		8,572
Washington West	2	22,492		22,492
<i>Source SMMUSD 3-14-05</i>		<i>Square footage excludes exterior walks/corridors</i>		

ADDITIONAL INFORMATION

Relevant Documents on Facilities Planning

The following existing plans and documents have been prepared and are available to serve as a basis for this planning process.

- Designing the Classroom of the Future – SMMUSD Strategic Plan – June 2002
- Joint Use Agreement with the City of Santa Monica
- Joint Use Agreement with the City of Malibu
- Prop X Oversight Committee Recommendations This committee made specific suggestions regarding facility planning which should be integrated into the Planning approach

Interview Summaries on Facilities Plan Needs, Process & Issues

- Interview Summary includes preliminary interviews with the Facilities Ad Hoc Committee, Superintendent, Board and District Staff to identify the most likely facility needs, process recommendations, and community issues
- Superintendent John Deasy
- School Board Members
- Chief Financial Officer Winston Braham
- Head of Facilities Management, Wally Berriman
- Members of the Ad Hoc Facilities Committee

APPENDIX:

For Phase 1: DISTRICT & COMMUNITY OUTREACH

Key Stakeholders to Include in the Facilities Master Plan Process:

District Staff and Officials

SMMUSD Administrators via Full Cabinet meetings
Board Appointed Committees and District Advisory Committees (DACs include: Accessibility, Title I, Child Care & Development, Community Health & Safety, Bilingual, GATE, Prop X Oversight, Fine Arts, Financial Oversight, Instructional Technology, Intercultural Advisory Council, Special Education, Sports and Physical Education, School Improvement, Strategic Planning)
SMMUSD Teachers and Classified Personnel, Bargaining Unit Leadership
Assistant Superintendent for Fiscal & Business Services (Project Management)
Head of Facilities Management (Project Management)
District Facilities Ad Hoc Committee
School sites through Site Governance Councils, "Site Plans" and Principal Interviews
School Board Members

Preferred methods of input: Discussions at key points at School Board meetings, Full Cabinet meetings with district administrators, District Advisory Committee meetings (there are approximately 15 active committees) and other regularly scheduled meetings. Detailed discussion of facility options at District Facilities Ad Hoc Committee meetings and with Board Facilities committee if created for bond measure. Questionnaires to identify facility needs and top 5 priorities for Site Governance Councils & Site PTAs to complete.

Users of Specialized Facilities

Child Development Services staff, including preschool and after school District and City CREST staff
Music, performing arts, and visual arts instructors
Humanities, Science, math and language teachers
Librarians, Technology managers & instructors
Athletics/Physical Education instructors
Special Education staff
Spanish language Immersion programs
Preferred methods of input: Questionnaires on facility needs, DAC meetings to review specialized facility requirements, review and comment on administrative draft assessments & plan

Current and Potential Governmental and Community Partners

City of Santa Monica – City Manager, Planning Director, Cultural Services Director
City of Malibu-City Manager, Planning Director, Parks Director
Santa Monica College
Chambers of Commerce
Non-profit Youth Services Organizations
Preferred methods of input: Brainstorm meetings with key leadership including relevant City Commissions, to identify possible options, develop strategies for new facilities, briefings to Planning Commissions or Councils, community meetings on draft plan and implementation.

Students, Advocacy Groups, Fundraising & Community Groups Supporting Schools

Parent Teacher Student Associations
CEPS – Community for Excellent Public Schools
Education Foundation of Santa Monica & Malibu
For the Arts, Potential Grant Sources: Foundations
Middle and High School Student Representatives
Economically disadvantaged students & parents
Minority students & parents, including organized minority student groups
Race & Discipline Task Force
Special education students & parents
Neighborhood Associations (to notify of community meetings, solicit public input)
Preferred methods of input: questionnaires or surveys, meetings to discuss issues and possible facility implications, at least one community-wide workshop to discuss issues, options & priorities, public comment on draft plan by key groups