

**Facilities Optimization Committee
Meeting Agenda
January 5, 2021
Via Zoom**

Join Zoom Meeting

<https://us02web.zoom.us/j/88416342488?pwd=ZFpKc05QaEtFOVNPN0RIU05wTFlyQT09>

Meeting ID: 884 1634 2488

Passcode: 045895

Dial by phone: 646 558 8656

1. Approval of minutes
2. Discussion/Decision regarding issuing an RFP
3. Any new items
4. Adjournment

DRAFT December 13, 2020

Town of Weston, Connecticut

Request for Proposal

**Facilities Optimization Committee
Project**

1. PURPOSE

The Town of Weston, Connecticut (the “Town”), through its Facilities Optimization Committee (the “FOC”), is accepting proposals from qualified professional consulting firms (the “Consultant”) to provide professional services to the FOC related to the possible consolidation, expansion, closing, and/or renovation of Town educational facilities and certain Town administrative facilities, and the relocation of municipal and school staff offices located in those facilities. Interested Consultants shall possess extensive knowledge and experience in the fields of municipal facility planning, facility assessment, engineering and design, educational facility specifications and programming, cost estimation, and project financing and reimbursement. It is anticipated that the project will commence shortly after Consultant selection and contract execution. The estimated completion date will be late 3Q or 4Q, 2021.

2. OVERVIEW

The lead entity for this work will be the FOC. The FOC includes the Chairs of the Town’s Board of Finance, Board of Education and Planning & Zoning Commission, other representatives of these bodies, and members of the public at large. The selected Consultant will work with and under the general direction of the FOC and its Chairman, Rick Bertasi.

The FOC was formed to determine if it is possible to modify the footprint of the school and Town facilities to optimize lifetime costs (capital, facilities, operating expenses, other Board of Education staffing and expenses), improve the learning environment, create appropriate synergies for Town and school staff, and ensure consistency with the Town’s Plan of Conservation and Development. The FOC will provide its recommendations to the Town’s Board of Education, Board of Selectmen, and Board of Finance for use in decisions regarding the long-term use of school and Town facilities.

Educational Facilities Goals:

Roughly three quarters of the Town’s annual budget is allocated to the Board of Education’s needs. Accordingly, a critical focus of this project is to determine whether Town costs attributable to the Board of Education can be reduced or mitigated by decreasing the current four school buildings to three buildings and reallocating the grades and staff currently assigned to those four buildings accordingly.

The Town currently maintains the following four school buildings on one integrated campus:

- Weston High School (Grades 9-12)
- Weston Middle School (Grades 6-8)
- Weston Intermediate School (Grades 3-5)

- Hurlbutt Elementary School (Grades pre-K-2). (Hurlbutt also contains the Town's senior center.)

To date, the FOC has concluded that Weston High School and Weston Intermediate School should remain in place. It is considering whether the Town could reallocate students from the current configurations, use either Weston Middle School or Hurlbutt Elementary School as the surviving third school and achieve cost savings versus the current four-school configuration, without material negative impact to the current educational standards.

The two principal scenarios being considered currently are:

1. Close (and repurpose) Hurlbutt and house students in the remaining three schools in the following manner:
 - High School – Grades 9-12
 - Middle School – Grades 5-8
 - Intermediate School – Grades pre-K-4
2. Close (and, if possible, repurpose) the Middle School and house students in the remaining three schools in the following manner:
 - High School – Grades 9-12
 - Intermediate School – Grades 5-8
 - Hurlbutt – Grades pre-K-4

Based on current enrollment figures and projections, the FOC currently believes that it will not be possible to consolidate the four existing facilities into three facilities going forward without significant capital investment in one or more of the surviving facilities.

The FOC is prepared to consider alternative approaches to the above scenarios that might be identified by the Consultant.

Administrative Facilities Goals:

Additionally, this project will consider whether the Town's following administrative buildings can be reorganized with similar efficiencies in mind:

- Board of Education Central Office
- Annex (Containing Land Use, Social Services and certain School District Departments [PD]).
- Bus Depot (for school buses)
- Historic property known as "Jarvis". (Jarvis houses the Parks and Recreation Department, and is located in an Historic District)
- Town Hall (Also located in an Historic District)

The FOC has preliminarily determined that the Annex is approaching the end of its useful life. The Bus Depot should, if economically feasible, be repurposed and the buses moved to another location.

Relevant background studies and materials:

Background facility assessment documentation, which was completed in 2013 and 2017/18 by Silver Petrucelli Architects, and the most recent school enrollment projections, which were completed by Milone & MacBroom, are available on the Town website at the following links:

<https://westonps.org/district/facilities-3/feasibility-studies/>
[need 2013 SP and Milone links]

Any potential solutions within those documents have been considered to date by the FOC in the course of arriving at this RFP. Within the documents is substantial baseline information on the physical condition, maintenance and improvement opportunities, which the FOC will rely upon as it further considers the alternatives for the Town. The documents foresee a need to replace any end-of-life features of the schools, repair any deferred maintenance capital items and potentially modify the school configuration if supported by future changes in enrollment.

The 2020 Plan of Conservation and Development (the “POCD”), approved by the Town’s Planning & Zoning Commission, is available for review on the Town website at the following link:

<http://www.westonct.gov/media/file/TownPlanFinal%2808-20-10%29ssnewpagenumbersize.pdf>

It should be noted that although the Town is exempt from regulation by its Planning & Zoning Commission, the POCD contemplates creation of an expanded commercial zone adjacent to Hurlbutt Elementary School on the school campus and recommends the repurposing of certain Town properties, and as such provides guidance for the FOC’s consideration.

3. SCOPE OF SERVICES

A. Questions Presented and Analyses Required

- (i) Of critical importance to the study is the answer to the following question: Given school population trends and expectations, based on a high-level analysis, can the Town move from the four-school model currently utilized to a three-school model at a reasonable cost and timeline?
- (ii) If the answer to the preceding question is “yes,” the Consultant shall assist the FOC in producing a School Facilities Restructuring Plan containing an analysis of alternatives, and preliminary designs and cost estimates, for facilities consolidation, expansion, closing, and/or

renovation, in order to move to a three-school model, as well as the Consultant's recommendations regarding the foregoing. This analysis shall include comparing the cost of moving to three schools with continuing the current four-school configuration in a 10 to 20-year timeframe.

- (iii) Regardless of the answer to Question (i) above, the Consultant shall develop a plan to optimize the Town's non-school facilities described above under "Administrative Facilities Goals," including placement of Town personnel within such facilities. If the answer to Question 1 is "yes," then that plan could include placing non-school Town employees in Hurbutt Elementary School or the Middle School.
- (iv) Beyond modifications required to consolidate into three schools, are there facility enhancements, such as physical security, sustainability (e.g., carbon footprint, water and waste reductions), health and safety, daylight enhancements, MEP improvements or others that would be beneficial to conduct simultaneously with the required modifications to the schools or other Town facilities? And if so, at what cost/benefit?
- (v) Are there recommended renovations or alterations that would enhance students' 21st-Century learning environment?
- (vi) [AFTER 12/4 BoE Facility Committee meeting, INSERT answer to Q: What are the programmatic changes and other upgrades desired by the Board of Education, and what would be the capital requirements attributable thereto?]?

In (ii), (iii) and (iv) above, the Consultant shall account for probable hazardous materials abatement costs in proposed building renovations, based on facility age and any reports/data available from the Town.

In addition, the assessment of options needs to incorporate the potential timing for incurring additional capital investments, and the impact upon, and to be sensitive to, the financial situation of the Town. The Town's current debt service charges from previous school construction drop significantly beginning in the 2023-24 fiscal year and are extinguished by the 2025-26 fiscal year, which will influence the Town's ability and willingness to incur additional capital expenditures prior to those dates.

B. Components of Consultant's Services

The final scope of the Consultant's services, including deliverables, is anticipated to be clarified once proposals are received and reviewed and a Consultant is selected. At this point, the FOC contemplates that the services may include at least the following components:

- (i) Review existing documentation and studies, and research existing conditions, to create a broad assessment of existing facilities, noting building condition and/or code deficiencies. Using this information, develop a baseline scenario outlining a 10 – 20 year continuation of the status quo in which all facilities are brought to and maintained in good repair. Note that development of detailed building condition assessments is not considered part of the scope of this project, but some buildings may need limited engineering review as an update to prior assessments. Any updates of prior assessments which the Consultant deems required should be specified in the response and priced as an alternate.
- (ii) Taking into account the prior studies, as reviewed pursuant to (i) above, assess the function, space needs, and programmatic needs of each school (excepting Weston High School), and department or function, including projected enrollment requirements, to determine building net and gross area requirements to meet those programmatic needs.
- (iii) Study alternative school layouts, building plans, or building modifications (including those cited in 2.A(iv) above), to determine if existing or alternative layouts of the current schools have the capacity to accommodate the proposed school changes. Analyze parking and access issues for the selected layout(s) taking into account property lines, setbacks, wetlands and any other relevant limitations.
- (iv) Based upon the foregoing, study alternative Town administrative space layouts, building plans, or building modifications, to determine if existing or alternative layouts of the current Town facilities, including any vacated from the foregoing, have the capacity to accommodate the proposed changes. Analyze parking and access issues for the selected layout(s).
- (v) Identify short-term swing space options to accommodate ongoing operations with no impact to educational delivery if possible, and minimal disruption while buildings are in construction and/or renovation
- (vi) Prepare a preliminary assessment of options that lists, for each option, the following: pros and cons of each alternative and physical feasibility of each alternative. For the scenario(s) selected by the FOC for further analysis, prepare a projected cost (including design, construction and operating costs) of each alternative; effectiveness and benefits; relative importance/urgency of each of the identified needs; and comparison to the baseline scenario of the applicable current school and Town buildings, grade configurations and staff locations remaining in place.
- (vii) Recommend a preliminary project timeline or schedule from appropriation of funds through design, construction and phasing steps.

- (viii) Investigate and document potential funding sources available to the Town. These sources include but are not limited to eligibility for State reimbursements under various programs.
- (ix) Facilitate work/review meetings as necessary with the FOC and relevant Town Boards, the school administration and the Town Administrator, and provide project updates and/or recommendations throughout the project. Please specify minimum meeting expectations.
- (x) In coordination with the FOC, create and manage an efficient and effective public participation process, with a goal of achieving consensus among citizens of the Town relative to a long-term vision for the efficient and effective use of school and other municipal facilities, including but not limited to public meetings, digital and social media, mailings and assistance with the development of focused surveys.
- (xi) Review comparable information and data from DRG A schools, and other municipal or school systems of similar size or facing similar options, benchmark recommended options relative to such other districts in terms of efficient safe space utilization, and review said information with the FOC.
- (xii) Working with the FOC, integrate the above materials into a master Plan that will provide a framework for capital building projects with estimated project costs for the Town's Capital Plan. Prepare a Final Draft of the Plan and Executive Summary for presentation to the Board of Selectmen, the Board of Education and the Board of Finance in print and digital form, including a matrix of recommendations over the short, medium, and long term.

All recommendations must comply with the Town Charter, Board of Education policies and all relevant State and Federal requirements.

4. GENERAL

In order to be awarded this assignment, the selected Consultant must meet all State and Federal affirmative action and equal employment opportunity practices.

The Consultant shall obtain and maintain, at its sole expense, Professional Liability Insurance in a minimum amount of \$1,000,000. The Consultant shall also obtain and maintain, at the Consultant's sole expense, such insurance as will protect the Consultant from claims under Workers' Compensation and Comprehensive General Liability Insurance that will protect the Town from all claims of bodily injury, death or property damage which may arise from the performance by the Consultant or its employees in their functions and services to the Town. Limits of insurance shall be \$1,000,000 per occurrence, \$2,000,000 aggregate. Workers' Compensation shall be

in accordance with Connecticut Statutes. The Consultant shall, within five (5) days after the Notice of Award date, provide proof of this insurance. The Town shall be listed as an additional insured.

After review of the responses to this Request for Proposal (RFP), the FOC will conduct interviews of those Consultants it identifies as potential candidates. The following factors will be evaluated and weighted appropriately in the selection process:

- Technical competence of the Consultant
- Consultant's experience on similar projects
- Consultant's qualifications and experience of its key personnel
- Reputation of the Consultant based on references
- Consultant's ability to schedule the project within the time constraints
- Evaluation of the fee proposal

This RFP is not a contract offer. The Town reserves the right to (1) reject any and all proposals, and to reject any part of any proposal; (2) waive any informalities in any and all proposals deemed not in the best interest of the Town; and (3) negotiate with any Consultant any amendments to the contract. The Town may choose to award separate contracts for work defined herein to individual Consultants, if deemed in its best interest.

It shall be understood that the award made by the Town shall be final and conclusive and without recourse or appeal by the remaining Consultants. The award of the contract, if made, will be made within [ninety (90) days] after opening of the proposals (the "Notice of Award"). The Town will not award the contract to any Consultant that is in arrears or in default to the Town with regard to any tax, debt, contract or any other obligation. [Does the Town ask for any litigation a firm is involved in?]

The selected Consultant will be expected to execute a standard contract for professional services, as proposed by the Town, within fifteen (15) days following the Notice of Award. The Notice of Award does not provide any rights to the Consultant and does not impose on the Town any obligations. The Town may withdraw the award at any time, and for any reason, prior to the signing of the contract by the Town.

5. SUBMITTAL REQUIREMENTS

a) Cover Letter: Interested Consultants shall submit a cover letter addressed to Jonathan Luiz, Town Administrator, Weston Town Hall, 56 Norfield Road, Weston CT 06883, signed by an authorized principal or partner of the Consultant, which provides an overview of the Consultant's proposal (the "Proposal"), as well as the name, title, phone and fax numbers, and email address, of the person to whom questions concerning the Proposal may be directed. **[To the extent that the**

information requested below is duplicative of information previously provided by you as part of your response to the FOC's RFQ dated _____, 2020, such information need not be repeated in response to this RFP.]

b) History and Resumes: The Consultant must include a brief history of the Consultant, including:

- Size and organization;
- Full legal name of the Consultant, including registered legal name if different;
- Ownership, including whether the company is a qualified minority owned enterprise;
- Presence in Connecticut and the surrounding States;
- Length of time the Consultant has been in business;
- Products and services offered by the Consultant;
- Resumes for all professionals to be assigned to the project, including resumes of any subcontractors and all professional licenses held by relevant principals and employees of Consultant; and
- Identification of the lead project manager[, who shall be a Certified Planner by The American Institute of Certified Planners].

c) Scope of Work: The Consultant shall provide a detailed Scope of Work that outlines various services it will provide for the project. All services not specifically mentioned in this document, which are necessary to ensure that the purpose and scope are met, shall be included in the Proposal. The Proposal, project schedule and scope of work shall reflect the number of anticipated meetings with the FOC, public meetings, and a list of all deliverables.

d) Experience and Ability to Perform: The Consultant shall provide examples of previous work on similar projects to demonstrate the Consultant's understanding and familiarity with projects of this type, including providing a list of similar projects for comparable Connecticut communities that have been completed in the last five (5) years. Examples shall include adequate details that demonstrate the Consultant's ability to meet the requirements and purpose of the project. The Consultant also shall identify projects of a similar nature that required dispute resolution, such as litigation, arbitration or mediation, involving the Consultant, and describe briefly the matter giving rise to the need for resolution.

e) Project Approach: The Consultant shall outline a proposed approach to the project, including information on community outreach and methodologies, consensus building and innovative approaches to facility closing, expansion, consolidation and/or renovation, and consolidation of municipal and school offices. The Consultant shall also specify whether it would propose to work with any specialist firms on the project, and provide relevant examples under References below of how those firms would benefit the project.

f) References: The Consultant shall provide a list of [at least three (3) previous contracts] which are similar to the Town's purpose and scope of services, including:

- Dates of contract and duration;
- Services performed and fees for services;
- Names and contact information of the lead professional and other professionals who performed services for the contract, including the names and contact information of subcontractors;
- Name, address, telephone numbers of clients who may be contacted for verification of information submitted;
- Statement as to whether projects were completed on time and within budget;
- Rough cost parameters of the Consultant's services; and
- Provide two industry references

g) Fees: The Consultant is requested to submit an estimated total cost for completion of the project. The fee proposal must include a breakdown of the fees, the allocated man hours and the anticipated completion dates of each major component as itemized in Section 3B. above, and a breakdown of any remaining tasks to be completed. Note that the specific reviews of Town administrative facilities and the bus depot are considered "add alternatives" which require price break outs such that these items may be included or excluded without impact to the balance of the scope and pricing.

6. SUBMISSION

All respondents shall provide written confirmation of their intent to respond no later than 4:00 PM on January 25, 2021 to [insert group email for Rick, Gayle and maybe Jonathan? This way we know who is intending to respond, and they only have to send one email at that time.]

All proposals and the information required for this project must be submitted in sealed envelopes, clearly identified as "RFP for Facilities Optimization Committee Project", labeled with the name and address of the proposing Consultant, must be in a clear, concise and legible manner so as to permit proper evaluation, and must be submitted with five (5) paper copies and one (1) CD or USB copy to Jonathan Luiz, Town Administrator, Weston Town Hall, 56 Norfield Road, Weston CT 06883, no later than 4:00 pm on [February 5, 2021], at which time the proposals will be publicly opened. Proposals received prior to the time established herein for the receipt and opening of the same will be securely kept unopened. The Town officer whose duty it is to receive and open all proposals will decide when the specified time has arrived for the opening of same. No responsibility will be attached to any Town officer for premature opening of a proposal not properly addressed and identified.

Proposals submitted after 4:00 pm on [February 5, 2021], or not in accordance with these instructions will not be considered. Telegraphic or faxed proposals will not be considered. Any proposal may be withdrawn by a written, electronic or fax request received at least one hour prior to the hour fixed for opening the proposals. All costs

incurred in the preparation and presentation of the Proposal shall be wholly absorbed by the Consultant. Any material submitted shall become the property of the Town and therefore shall be subject to disclosure and be available for review under the Freedom of Information Act.

[The Town may, before or after the public opening of bids and in its sole discretion, modify, amend or terminate this RFP if the Town determines it is in the Town's best interest. Any modifications or addendums to, termination of, or questions and responses regarding this RFP shall be posted on the Town's website at [INSERT]. Each respondent is responsible for periodically checking the Town's website.

7. POINT OF CONTACT

Any questions regarding this RFP shall be emailed prior to [DATE] to Rick Bertasi at RBertasi@westonct.gov. [add Gayle and Jonathan] Questions will not be accepted via phone.

[other Town requirements for RFPs?]