

**UPDATED**

JANUARY 8, 2018

SCHEDULE, WORK PLAN UPDATE  
and PRICING DOCUMENT



SUBMITTED BY:

ED HUMBLE, PH.D.

SENIOR VICE PRESIDENT OF  
EDUCATION

516 NORTH ADAMS STREET  
TALLAHASSEE, FLORIDA 32301

850.386.3191

[EHUMBLE@MGTCONSULTING.COM](mailto:EHUMBLE@MGTCONSULTING.COM)

**School Assignment  
Optimization and Facility  
Condition Assessment**

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**GUILFORD COUNTY BOARD OF  
EDUCATION AND BOARD OF  
COMMISSIONERS JOINT CAPITAL  
AND FACILITIES COMMITTEE RFQ**



January 8, 2018

Scott McCully  
Guilford County Public Schools  
501 West Washington Street  
Greensboro, NC 27401

Dear Mr. McCully,

The MGT Consulting Group (MGT) is pleased to submit our revised cost proposal in response to the Guilford County Board of Education and County Commissioners Joint Capital Facilities Committee RFQ for a **School Assignment Optimization Plan and Comprehensive Facility Condition Assessment**. We are excited about this opportunity to work with the Joint Capital Facilities Committee to develop strategies and data for these projects, and we are committed to providing cost effective, quality services.

It is our understanding that the Joint Capital Facilities Committee is requesting a cost estimate reduction to align with the allocated resources of the County and District to complete this project.

Please find enclosed as requested a detailed list of deliverables showing the adjusted component pricing and total project costs.

We fully recognize the opportunities and the challenges associated with a project of this nature and the importance of conducting the project *in collaboration* with the Joint Capital Facilities Committee. Together, with the Joint Capital Facilities Committee, we will ensure a quality, cost effective and actionable facility and growth management plan that will address the short- and long-term facility needs of its students and community.

If you have any additional questions, or desire any additional information, please feel free to contact the proposed project director for this study.

PROJECT DIRECTOR	ED HUMBLE, PH.D. 1420 MARVIN RD NE, STE C, #342, OLYMPIA, WA 98516 (360) 402-7470 <a href="mailto:EHUMBLE@MGTCONSULTING.COM">EHUMBLE@MGTCONSULTING.COM</a>
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Regards,

Ed Humble, Ph.D.  
Senior Vice President of Education  
MGT of America Consulting, LLC



Below is a table which illustrates the latest cost projections and project deliverables as agreed upon by MGT and the Joint Capital Facilities Committee designees.

OFFEROR SERVICES	Total (New)
Project Initiation	\$14,184
GCS Data Integration and Upload	\$18,504
Academic Review Team (ART)	\$22,664
CAD Correction Process	\$135,773
Facility Assessments	\$489,158
Data Classification Modeling	\$62,344
School Optimization	\$23,744
Archibus Integration	\$30,664
Facility Re-investment Calculations	\$35,455
Planning review and draft	\$37,500
Final Report	\$29,655
Total Fee	\$899,645

# PROJECT WORK PLAN

## PROJECT INITIATION

### TASK 1.0: PROJECT INITIATION

#### OBJECTIVES:

- ♦ To ensure effective communication throughout the project.
- ♦ To ensure the project's final product will meet the District's goals and objectives.

#### ACTIVITIES:

- 1.1 Conduct project initiation meeting with appropriate district staff.
- 1.2 Distribute project directory for project team and identify key project team members for the district.
- 1.3 Identify the appropriate lines of communication.
- 1.4 Review proposed work plan and edit as appropriate to ensure the final product will meet the needs of the district.
- 1.5 Review proposed project schedule and adjust, as appropriate.

#### DELIVERABLES:

- ♦ Project directory.
- ♦ Final project schedule.
- ♦ Final work plan.

## PHASE I- DATA INTEGRATION AND ACADEMIC PLANNING

### TASK 2.0: GCS DATA INTEGRATION AND UPLOAD

To ensure an accurate inventory for the study, the MGT team will construct a facilities data base which includes all relevant data for the facilities to be included in the study. Nomenclature for facility and space types will be established with district staff.

#### OBJECTIVE:

- ♦ To ensure an accurate inventory of all district schools, facilities, and sites included in the scope of work.

#### ACTIVITIES:

- 2.1 Review existing inventory and planning information for use in determining appropriate categories of facilities.
- 2.2 Determine appropriate space-use categories to be included in the inventory and review with district staff.

- 2.3 Using existing district data (floor plans, etc.), populate building and room inventory data base.  
Room inventory to include:
- The current use for each building space
  - Educational room count by space-use category

2.4 Prepare an inventory report for each school.

**DELIVERABLE:**

- ◆ District buildings and site inventory, to be included in the final report.

**TASK 3.0: ACADEMIC REVIEW & PROGRAMMATIC PRIORITIES**

The foundation for a successful facilities master plan must be the district’s educational mission, goals, and objectives. MGT staff will review the district’s programs and develop a thorough understanding of the educational priorities that the district has established and the facility implications of those priorities. This understanding will enable the consulting team to develop a framework for developing facility recommendations and conducting educational adequacy assessments.

**OBJECTIVES:**

- ◆ To provide a framework for developing facility recommendations based on the mission, goals and objectives of the district.
- ◆ To ensure the plan will support teaching 21<sup>st</sup> Century skills to students.

**ACTIVITIES:**

- 3.1 Review existing data pertaining to the district’s mission goals, objectives, and programmatic priorities.
- 3.2 Review existing policies that affect facility planning.
- 3.3 Review current program information including school curriculum guides, department plans, facility plans, technology plans, state guidelines, future program planning, etc.
- 3.4 Meet with appropriate staff to review the district’s mission, goals, objectives and programmatic priorities and their impact on:
- 21<sup>st</sup> Century student skills
  - Curriculum development
  - Instructional program
  - Organization of grade levels
  - Utilization of facilities
  - School attendance zones
  - Parental involvement
- 3.5 Meet with district’s design team and review district’s educational specifications and develop educational adequacy guide for conducting educational adequacy assessments.
- 3.6 Meet with district’s IT staff and review district’s standards for IT infrastructure in schools. Develop IT guide for conducting Technology Readiness assessment.

- 3.7 Conduct analysis of the district’s educational program offerings to determine if all students have equitable access to the programs. Develop recommendations for equitable program offerings appropriate to the findings of the analysis.

**DELIVERABLES:**

- ♦ Report on programmatic priorities, current and proposed educational programs, and their associated facility implications, to be included in the final report.
- ♦ Guidelines for educational adequacy assessment.
- ♦ Guidelines for technology readiness assessment.
- ♦ Analysis and recommendations regarding program equitability.

## **PHASE II - FACILITY ASSESSMENTS AND DATA CLASSIFICATION MODELING**

### **TASK 4.0: CAD CORRECTION PROCESS AND FLOOR PLAN UPDATES**

**OBJECTIVES:**

- ♦ To gain an accurate alignment of current District CAD floorplans to represent actual building floor plans of each of the district schools and facilities and incorporate the information into a facilities database.
- ♦ Establish a comprehensive database of facility floor plans and organize and coordinate between eCOMET and ARCHIBUS database structure.

**ACTIVITIES:**

- 4.1 Review existing facility floor plans, as available, including inventory information:
  - Determine the current number and use of buildings and sites
- 4.2 Finalize floor plan adjustments using computer aided drafting software (CAD). The facility drawings will include;
  - Spaces not currently identified on District Drawings
  - Unique or repurposed instructional spaces
  - Non-instructional spaces
- 4.3 Develop the CAD database structure to facilitate data exchange with ARCHIBUS and other software.
- 4.4 Develop the drawing schedules in coordination with district.
- 4.5 Meet with school administrators and facility managers to outline scope of the project and define their role during the site visits.
- 4.6 Prepare a Facilities CAD Correction Report detailing the current and projected updates for each school and support service building and review results with district staff, as available.

## DELIVERABLE:

- ♦ Facility CAD Correction reports for each building, to be reviewed by district staff and revised by MGT, as appropriate, and included in final report.
- ♦ Print and distribute floor plans for use in facility assessments.
- ♦ Migrate Floor Plans to Archibus for long-range planning

## TASK 5.0: CONDUCT FACILITIES ASSESSMENTS

### OBJECTIVES:

- ♦ To gain an accurate assessment of each of the district schools and facilities and incorporate the information into a facilities database.
- ♦ Establish a comprehensive database of facility systems, current deficiencies and long-term capital renewal projections. Organize and coordinate ARCHIBUS and eCOMET database structure.

### ACTIVITIES:

- 5.1 Review existing facility condition data, as available, including inventory information:
  - Determine the current number and use of buildings and sites
  - Determine the current use for each building space
  - Inventory of current site usage including parking spaces, playgrounds, fields, etc.
  - Educational room count by space-use category
- 5.2 Identify District-owned property and facilities not directly related to the District's core educational mission and evaluate management options.
- 5.3 Finalize assessment methodology and discuss the review schedule and procedures. The facility assessments will include;
  - Site condition
  - Building Condition
  - Educational Adequacy
  - Technology Readiness
- 5.4 Develop the database structure to facilitate data exchange with ARCHIBUS and other software.
- 5.5 Develop the assessment schedules in coordination with district, ensuring school is in session and that no dates conflict with district testing schedules.
- 5.6 Meet with school administrators and facility managers to outline scope of the project and define their role during the site visits. The on-site reviews of condition and educational adequacy will be conducted simultaneously.
- 5.7 Conduct assessment evaluations to:
  - Assess the physical condition of each facility and all support service buildings
  - Assess the educational adequacy of each school
  - Assess the technology readiness of each school and support buildings
  - Assess the condition of the site and any site features

- 5.8 Prepare a Facilities Condition Report detailing the condition with current and projected deficiencies for each school and support service building and review results with district staff, as available.

**DELIVERABLE:**

- ♦ Facility assessment reports for each building, to be reviewed by district staff and revised by MGT, as appropriate, and included in final report.
- ♦ Summary FCI tables, suitability scores, and composite scores, capital renewal projections for 25 years, and executive summary of assessments.

## **PHASE III – FACILITIES OPTIMIZATION PLAN, REQUIREMENTS AND OPTIONS**

### **TASK 6.0: DATA CLASSIFICATION AND MODELING**

**OBJECTIVE:**

- ♦ To develop facility recommendations based on the district having sufficient or insufficient space to house current and projected enrollments.

**ACTIVITIES:**

- 6.1 Meet with appropriate district staff to collect data on demographics and enrollment projections.
- 6.2 Gather demographic data from community planners and the U.S. Census.
- 6.3 Review district’s current enrollment projection methodology.
- 6.4 Develop sample enrollment projections using MGT methodologies to verify consistency of conclusions.
- 6.5 Adjust enrollment projection methodology as appropriate.
- 6.6 Finalize enrollment projections for study period.
- 6.7 Review current school boundaries for possible adjustment due to enrollment patterns and school capacities.

**DELIVERABLES:**

- ♦ Ten-year enrollment projections by school, to be included in the final report.
- ♦ Projected areas of future attendance boundary adjustments, to be included in the final report.

### **TASK 7.0: SCHOOL OPTIMIZATION**

**OBJECTIVES:**

- ♦ To verify the capacity and utilization of all facilities included in the study.
- ♦ To address the short-term needs of the district regarding immediate space issues as well as the long-term needs based on programmatic requirements.

## ACTIVITIES:

- 7.1 Meet with district staff and review any existing capacity formula(s).
- 7.2 Apply MGT capacity formula to address the following issues:
  - Student/teacher ratios
  - Special or “pull-out” programs which require space that does not contribute to capacity
  - Special classrooms such as art and music
  - Core facilities such gyms and cafeterias
- 7.3 Apply finalized capacity formula to all schools and measure results against existing capacity ratings and staff experience.
- 7.4 Calculate and document capacity of all schools.
- 7.5 Based on enrollment projections and calculated capacities, determine if there is sufficient capacity to meet current and future needs or if additional school space is required.

## DELIVERABLES:

- ♦ Capacity formula(s), to be included in the final report.
- ♦ Capacity ratings of all schools, to be included in the final report.
- ♦ Enrollment vs. capacity charts, to be included in the final report.

## TASK 8.0: EVALUATE AND ANALYZE CURRENT AND PLANNED GROWTH AND DEVELOPMENT

### OBJECTIVES:

- ♦ To analyze residential housing for current, planned and potential future impacts to all facilities included in the study.
- ♦ To address the short-term needs and long-term needs of the district based on the current and future growth impacts.

### ACTIVITIES:

- 8.1 Meet with city, county, state and district staff to review residential planning models.
- 8.2 Determine growth numbers by school from each of the following:
  - Single Family Residential
  - Multi-Use Residential
  - Multi-family Residential
  - Non-Residential populations
- 8.3 Apply calculations to all schools and determine growth impacts in conjunction with enrollment and capacity numbers.
- 8.4 Create individual school GIS maps showing growth within each attendance boundary.
- 8.5 Calculate and document growth impact to all schools.
- 8.6 Based on residential growth analysis, enrollment projections and calculated capacities, determine if there is sufficient capacity to meet current and future needs or if additional school space is required.

## DELIVERABLES:

- ♦ Growth Impact Analysis
- ♦ Growth impact calculations for all schools
- ♦ GIS Maps displaying growth impacts to each school
- ♦ Combine growth analysis, enrollment projections and capacity calculations into visual GIS models for analysis

## PHASE IV – ARCHIBUS INTEGRATION, CAPITAL RE-INVESTMENT PLAN, AND FACILITY MASTER PLAN

### TASK 9.0: DEVELOP MASTER PLANNING OPTIONS

#### OBJECTIVES:

- ♦ To identify and define key goals for master plan components.
- ♦ To use information from district strategic plan and board priorities to develop optimization plan.
- ♦ To utilize data from assessments, including current joint use partnerships and opportunities for future partnerships.
- ♦ To identify the short-term needs of the district regarding immediate space issues as well as the long-term needs based on programmatic requirements.
- ♦ To review school boundaries for balance, grade configuration, and neighborhood impact.
- ♦ To explore facility implications based on identified trends or changes of interest in curricula, programs, instructional strategies, and technology.

#### ACTIVITIES:

- 9.1 Review existing data pertaining to the district's mission goals, objectives, and programmatic priorities.
- 9.2 Review existing policies that affect facility planning.
- 9.3 Meet with appropriate staff to review the district's educational program priorities and their impact on facilities. Program priorities could include:
  - Basic programs
  - Programs to assist disadvantaged students
  - Organization of grade levels
  - Instructional and information technology systems
  - Current and potential joint use partnerships
- 9.4 Develop master plan framework that identifies requirements for facilities based on priorities established in above tasks and options for addressing those requirements.

#### DELIVERABLE:

- ♦ Master plan framework that identifies requirements and options.

## TASK 10.0: CREATE SCENARIOS AND DEVELOP CAPITAL RE-INVESTMENT PLAN

### OBJECTIVES:

- ♦ To develop prioritized project scenarios based on data from assessments, enrollment, capacity and utilization analyses, and program reviews.
- ♦ To document community input into master planning process
- ♦ To analyze the cost of various short-, medium-, and long-term scenarios, including cash flow estimates.
- ♦ To draft a comprehensive plan, including schedule and implementation plan.

### ACTIVITIES:

- 10.1 Meet with appropriate staff and review the prioritization process. Prioritization can include factors such as:
  - Building condition
  - Educational suitability (functional adequacy)
  - Information technology infrastructure
  - Capacity
  - Utilization
  - Historical significance
  - Possible re-purpose of facility
- 10.2 Adjust prioritization process to meet the needs of Guilford County Schools.
- 10.3 Develop comprehensive scenarios to address multiple needs based on master plan framework developed in Task 8.0.
- 10.4 Develop budget estimates to remediate all deficiencies due to building condition, educational program inadequacies and/or capacity needs.
- 10.5 Meet with district representative(s) to identify funding sources and expenditures. Determine how expenditures are related to student enrollments or attendance, and how they may be related to facility sizes.
- 10.6 Develop alternative strategies (short-term and long-term) to meet the facility needs as prioritized over the plan period.
- 10.7 Review each strategy with district staff and board members, as appropriate.
- 10.8 Prepare draft report identifying the impact of recommended facility improvements on future operational budgets for the time period identified by the district.
- 10.9 Create review and feedback process for district staff and others, as appropriate.

### DELIVERABLES:

- ♦ Draft long-range capital master plan that includes:
  - Summary reports
  - Detailed building and deficiency data
  - Recommended funding and implementation program
  - Schedule and budgets for all projects

## TASK 11.0: ADOPTION AND IMPLEMENTATION OF MASTER PLAN

### OBJECTIVES:

- ♦ To use feedback from Phase 3 to revise draft plan.
- ♦ To ensure compliance with local, state, or federal requirements.
- ♦ To finalize recommendations for facility needs to support and enhance the District's strategic goals and programs.
- ♦ To present plan for district implementation.

### ACTIVITIES:

- 11.1 Utilizing the feedback from Phase 3, review and revise long-range optimization plan, as appropriate.
- 11.2 Conduct final analysis and review for local, state, and federal requirements.
- 11.3 Present final report to district officials and others, as appropriate.

### DELIVERABLES:

- ♦ Final report. One printed and bound copy, including all appendices. One electronic copy.
- ♦ Public presentation of final report.