



SHAKER HEIGHTS CITY SCHOOL DISTRICT

15600 Parkland Drive
Shaker Heights, OH 44120
(216) 295-1400
www.shaker.org

February 24, 2021

Request for Proposals | Professional Services

PROJECT MANAGER SERVICES

Proposals Due: March 8, 2021 at 12:00 NOON

A. Introduction

The Shaker Heights City School District, City of Shaker Heights, and Shaker Heights Public Library (“Client Group”) seek the services of a Project Manager to lead the development of a Joint Facilities Master Plan. The purpose of this collaborative plan is to assess educational programming and facility needs for the School District, and to evaluate synergies with facilities owned by the City and Library. Project Manager Services will include working with the Client Group to finalize the project’s scope of services, participate in the consultant selection process, and managing the selected consultant team and client team throughout the project’s engagement. The Project Manager will represent all three (3) organizations and the lead this process in a non-biased manner.

B. Background

Shaker Heights City Schools

The Shaker Heights City School District includes the City of Shaker Heights and a small portion of Cleveland near Shaker Square, encompassing approximately 7.5 square miles.

Shaker Heights Schools currently serves a diverse population of about 4,760 students in eight buildings: five K-4 elementary schools (Boulevard, Fernway, Lomond, Mercer and Onaway); Woodbury Elementary School (grades 5 and 6); Shaker Heights Middle School (grades 7 and 8); and Shaker Heights High School (grades 9-12). School facilities also include the Administration building, bus garage and parking lot, building services, and a data services building. The former Ludlow Elementary School building is leased to PEP Greenview Day Treatment Center.

More information can be found at www.shaker.org.

City of Shaker Heights

The City of Shaker Heights is a first ring suburb located approximately 8 miles east of downtown Cleveland. The City shares borders with Cleveland (west and south), Cleveland Heights (north), and Beachwood (east). The City's approximate 28,000 residents are racially and economically diverse. With eighty-percent of the city located within a National Register of Historic Places historic district, Shaker is well-renowned for its historic building stock and architectural distinction.

The City's operations consist of 13 departments dispersed throughout 8 buildings: City Hall and Annex, Stephanie Tubbs Jones Community Building, Firehouse #1, Firehouse #2, Service Center, Police Department/Municipal Court, Shaker Family Center, and Thornton Park's recreational facilities building. City facilities also include: parks, playgrounds, tennis courts, fields, and a pool.

More information can be found at www.shakeronline.com.

Shaker Heights Public Library

Shaker Library was established as a school district library in 1937. It currently is an independent library system, which is governed by a seven-member Board of Trustees that is appointed by the Shaker Heights Board of Education.

The library's original building opened in 1951 and a branch library, Bertram Woods, opened in 1960. Several decades later, a new Main Library was dedicated in the renovated Moreland Elementary School building in 1993. This is the current location of the Shaker Main Library, which is currently undergoing extensive renovations. The former Main Library location is now owned and operated by the City as the Stephanie Tubbs Jones Community Building.

More information can be found at www.shakerlibrary.org/.

Forward Together Vision Plan

In 2019, the three entities pursued a joint vision plan, entitled *Forward Together*, in order to explore the future of their facilities. The completed Forward Together Vision Plan was approved by each entity's administration and serves as the catalyst for this facilities master planning process.

The Vision Plan can be viewed here: <https://shakeronline.com/DocumentCenter/View/2741/2019-Forward-Together-A-Vision-for-Community-Facilities-PDF>

C. Purpose & Goals

The three entities value providing high-quality services and facilities to the community. Each taxing administration has passed measures to fund operations, and capital projects. The most recent tax measures are as follows:

- City income tax increase (2012) .5% increase to 2.25%, the first since 1981.
- Schools operating levy (2014) 6.9 mills; and capital improvement levy (2017) 3.75 mills.
- Library operating levy (2018) 1.9 mills.

To date, these efforts have been independent. The desire for this project is to foster a spirit of collaborative planning for future investments to make optimal use of scarce funding resources, land and buildings.

The goals of the Joint Facilities Master Plan project are to:

- Construct a plan for transforming school/city/library facilities into cutting edge community facilities to take the historic city into the future.
- Provide a facilities master plan to support innovative facilities in a coordinated effort to make best use of all facilities and to reflect school district enrollment trends and academic needs.
- Think out of the box and identify creative solutions for joint facilities and partnerships.
- Identify a strategy to transform underperforming and/or underutilized facilities into their best and most efficient use and identify future uses for these buildings.
- Reduce costs and make efficient use of tax dollars.
- Bring a fresh perspective to educational and programming needs.
- Provide a robust community visioning, public engagement, and equity strategy.

D. Scope of Services

The master planning process is viewed by the Client Group as a critical component of the efforts to assess existing facilities and prioritize improvements needed. The master plan will provide the basis for future capital improvements based upon the development of a prioritized list of facility improvements with costs. Due to the complexities of this process, the Client Group anticipates hiring a Project Team with a broad range of talent and experience, including vision planning, education planning, architectural services, and community engagement expertise.

The Client Group expects the Project Manager to be a leader and to use its resources to provide effective insight and administration of this Master Planning Process and coordination with the various team members. The Project Manager role is expected to be exclusive from the Consultant Team and cannot serve both roles.

General Project Manager Responsibilities:

1. Provide oversight and coordination of the project on behalf of the Client Group to effectively balance time, quality, and coordination of the Client Group.
2. Assist in the selection and hiring of the Consultant Team.
3. Manage the Consultant Team, including selection and hiring process, guiding and reviewing their work product to produce a plan that includes a vision plan, educational plan, architectural services, options analysis, and robust engagement strategy.
4. Provide expertise in project phasing, scheduling, and coordination.
5. Work with the selected consultant team, the Client Group, and communications staff to maintain and update a project website.

6. Maintain comprehensive project records for the Client Group's use.
7. Keep the master plan project on schedule and on budget.
8. Attend Steering Committee/Board/Council meetings, Community Meetings, and other meetings as requested.

Phase 1: Pre-Planning Responsibilities:

1. Work with the Client Group to outline critical goals for a successful project and refine the scope of facilities master planning services to be performed.
2. Manage Consultant Team selection, including reviewing the consultant qualifications along with the Client Group, checking references, analyzing fees, managing the interview process and attending interviews.
3. Work with Client Group and selected Consultant Team to finalize a scope of services and contract agreement.

Phase 2: Facilities Master Planning Responsibilities:

1. Lead the Facilities Master Plan process to identify the educational plan and related facility needs, including City and Library facilities. Ensuring that all pieces of the plan are completed, and that a robust engagement strategy is implemented.
2. Attend and facilitate design meetings with the Client Group and Consultant Team.
3. Participate in the review of project documents prepared by the Consultant Team and provide timely feedback to the Client Group and Consultant Team.
4. Help coordinate and plan public forums to facilitate the receiving and processing of public feedback on the Facilities Master Plan.

These services may be modified and/or supplemented during negotiation of the agreement for Project Manager Services with the Client Group.

Firms are encouraged to identify other services that would enhance the role of the Project Manager and provide more effective administration of the Master Planning Process.

E. Preliminary Schedule

The preliminary timeline for the facilities planning process is outlined below and anticipates at least a 12 month process; however, the Client Group is open to alternate schedules and suggestions to improve the process.

Project Manager Schedule:

- **February 24** **Project Manager RFP distributed**
- **March 3** **Deadline for RFP questions and clarification**

- **March 8** **Proposals due**
- **March 10-12** **Project Manager interviews (tentative)**
- **March 15** **Project Manager selected (tentative)**
- **March 22** **Project Manager kick-off**

Master Plan Process Schedule:

- February 24 Consultant Team RFQ simultaneously distributed
- March 12 Deadline for RFQ questions and clarifications
- March 22 Qualifications due
- March 24-26 Consultant Team interviews (tentative)
- End of March Consultant Team Selected (tentative)
- April Project kick-off meeting
- April-December Planning and Community Engagement
- December Interim options report
- April 2022 Plan adoption

The selected Project Manager will be expected to review submitted qualifications for the Consultant Team, manage the interview process, and attend interviews in order to preliminarily select a consultant team by the end of March.

F. Proposal Submission Requirements

Consultants wishing to submit their proposals shall include the following minimum information:

- 1) Firm Overview. Include:
 - i) Brief history and philosophy of the firm. Describe the aspects of the firm's approach to project management services that have made it successful.
 - ii) Describe the firm's staff composition. Include staff qualifications and resumes of key personnel who will be directly involved in providing services to the Client Group.
 - iii) Specific qualifications of the Project Manager, including a listing of their recent master plan experience.
- 2) Experience.
 - i) Provide list of school, city, and/or library facilities master planning projects that the firm has been involved in over the past five (5) years as Project Manager or in another role.
 - ii) Identify one large facilities master planning project or K-12 project for which the firm has served as a Project Manager or Owner's Representative. Describe the project scope

and project cost. Include additional information such as website links or digital project reports.

- iii) Describe the firm's experience involving Master Planning and its role in making sure all stakeholders are represented.
- 3) Project Approach – likely approach and strategy to be used, including suggestions for developing effective communication with the Client Group, Consultant Team, and community.
- 4) Cost.
 - i) Include the cost for providing the requested services ("Fee"), including pricing for different services proposed that the firm believes would enhance the Master Planning Project. The Fee must be a fixed amount, including all reimbursable expenses.
- 5) References.
 - i) Provide references for the project examples requested above. Reference information must include: client name, title, address, phone, and email.

G. Evaluation Criteria

Firms will be evaluated on the following criteria:

1. Completeness – The proposal should include all the information included in the submission requirements (Section **Error! Reference source not found.**). Information should be complete and clear.
2. Qualifications and Previous Project Experience –
 - a. It is important that the Project Manager possess excellent communication skills; project manager and/or owner's representative experience; facilities master planning experience; and an ability to understand and represent the Client Group's interests.
 - b. Experience in managing a client group from multiple agencies, managing a consultant team, and familiarity with the Ohio Facilities Construction Commission (OFCC) is beneficial.
3. The Client Group will examine the requested previous projects documented in the proposal and will contact references. While not a prerequisite, experience with public entities is preferred.
4. Proposed Fee for Services.

Following this evaluation, short listed firms will be asked to meet with the Client Group for a virtual interview tentatively scheduled between Wednesday, March 10 and Friday, March 12.

Proposals must be emailed in PDF format no later than March 8, 2021 at 12:00 NOON.

Submit proposals to:

Jeffrey Grosse
Chief Operating Officer
Shaker Heights City Schools
grosse_j@shaker.org
216-295-4310

Questions and/or clarifications should be emailed to Jeffrey Grosse, Chief Operating Officer, at grosse_j@shaker.org and Joyce Braverman, Planning Director for City of Shaker Heights, at joyce.braverman@shakeronline.com by March 3, 2021.

EQUAL EMPLOYMENT COMPLIANCE REQUIREMENT

By submitting this proposal, the respondent certifies conformance to applicable federal acts, regulations, executive orders, and Ohio statutes and administrative rules concerning affirmative action toward equal employment opportunities. All information, records, and reports that the respondent is required to maintain for this purpose by federal or state agencies having responsibility for the enforcement of such laws shall be supplied to the District upon request.

The City of Shaker Heights is an Equal Opportunity Employer and prohibits, in accordance with the law, discrimination on the basis of race, color, religion, military status, national origin, disability, age, ancestry, sex, sexual orientation, and gender identity or expression. Minority Business Enterprises, Female Businesses and Small Business Enterprises shall be afforded full opportunity to submit proposals. The Vendor awarded a contract pursuant to this RFQ shall not discriminate against any employee or applicant for employment because of race, color, religion, military status, national origin, disability, age, ancestry, sex, sexual orientation, and gender identity or expression. Vendor's employees must be treated during employment without regard to race, color, religion, military status, national origin, disability, age, ancestry, sex, sexual orientation, and gender identity or expression. As used herein, "treated" means and includes without limitation the following: recruited, whether by advertising or other means; compensated, whether in the form of rates of pay or other forms of compensation; selected for training, including apprenticeship, promoted, upgraded, demoted, downgraded, transferred, laid off and terminated. The Vendor shall post in conspicuous places, available to employees and applicants for employment, notices to be provided by its hiring representatives setting forth the provisions of this nondiscrimination clause and that contractor is an Equal Opportunity Employer.