

COOPERATIVE REQUEST FOR PROPOSALS:

**CONSOLIDATION STUDY FOR THE PURPOSE
OF CENTRALIZATION**

FOR THE FISCAL YEAR:

2016-17

For the following participating school districts:

Clymer Central School District

Panama Central School District

REQUEST FOR PROPOSALS

CONSOLIDATION STUDY FOR THE PURPOSE OF CENTRALIZATION

I. INTRODUCTION

A. GENERAL INFORMATION

The Clymer Central School District and the Panama Central School District (the School Districts) are requesting proposals from qualified firms or individuals to perform a feasibility study for Consolidation for the purpose of Centralization between the School Districts that are permissible within the Education Law and the Rules for Classified Civil Service.

There is no expressed or implied obligation for the Districts to reimburse responding firms for any expenses incurred in preparing proposals in response to this request for proposals. To be considered, three (3) copies of a proposal must be received by Dr. David O'Rourke, District Superintendent, Erie 2-Chautauqua-Cattaraugus BOCES, Carrier Administrative Offices, 8685 Erie Road, Angola, NY 14006 prior to the close of business (4:00 pm) on **December 12, 2016**. The District's reserve the right to reject any or all proposals submitted. Proposals submitted will be evaluated by the School District's' Superintendent and representatives of each of the Boards of Education.

At the discretion of the School Districts, firms submitting proposals may be requested to make oral presentations as part of the evaluation process at a time determined by the School Districts. It is anticipated that the selection of a firm or individual will be completed **by the week of January 17, 2017**. Following the notification to the selected firm or individual, a contract will be executed between the parties as soon as possible thereafter.

B. TERM OF ENGAGEMENT

It is anticipated that the time required to complete the feasibility study is approximately four to six months after the appointment of the study consultant. An extension may be granted at the sole discretion of the School Districts for up to one month based on unforeseen circumstances.

II. NATURE OF SERVICES REQUIRED

A. GENERAL

The School Districts are soliciting the services of qualified firms or individuals to study the feasibility of Consolidating for the purpose of Centralization of the Clymer Central School District and the Panama Central School District within the Education Law and the Rules for the Classified Civil Service. Of particular interest is the analysis and feasibility of creating a new Centralized school district comprised of these two districts.

B. SCOPE OF WORK TO BE PERFORMED

The recipient firm or individual is to meet regularly and facilitate a kick-off and subsequent progress sessions for the School Districts and members of their Boards of Education relative to the progress and preliminary findings of the feasibility study. Based upon site visits, meetings with stakeholders, and data collection, the study must include analysis and evaluation of the existing structure and effectiveness as well as the feasibility for the consolidation into one district. The following items shall be taken into account:

- Community and School Community Stakeholder Perspectives
- Students/Enrollment Trends
- Educators/teaching faculty and educational leadership staff
- Business Office Operations
- Financial/Tax Information
- Transportation Services
- Food Services
- Athletic Program and Management
- Course offerings, curricula and curriculum coordination
- Facilities
- Human Resources
- Instructional Information Services [student data management]
- School District Reorganization
- Instructional Technology
- Foundation Aid, Debt Service and Fiscal Planning, including Incentive Aid modeling for multiple fiscal years

It is the Clymer and Panama Board of Education's expectation that the communities will be engaged in focus groups to provide information and perspectives of parents, students, community residents, business owners, and other key stakeholders. The RFP's description of the scope of work must include specific information about activities that will be undertaken by the recipient firm or individual with respect to the collection of data and information, as well as steps taken to engage community stakeholders in providing this data and information.

Additional functions may be included as developed through facilitation and consultation with Superintendents and participating Board of Education members in preliminary meetings. The recipient firm or individual is also expected to suggest additional factors for consideration, which are not expressly outlined above.

In addition, it is expected by the New York State Education Department that the recipient firm or individual will cooperate fully with State Education Department representatives in regard to every aspect of this feasibility study.

C. REPORTING TO THE DISTRICTS

The recipient firm or individual conducting the feasibility study is to provide two types of reports: Individual District reports and Combined Services Reports, both of which are to be presented in narrative format and include supporting data. Individual district reports are to be presented to both districts and the BOCES and must include information as to current levels of effectiveness or ineffectiveness of the finalized list of functions and recommendations with cost projections and savings as to any functions under consolidation.

The Combined Services report is to be presented to both districts and the BOCES and include narrative information and recommendations for consolidation, which must be supported by data. The School Districts shall provide access to necessary records and/or information resulting from direct contact to designated school representatives.

III. DESCRIPTION OF THE DISTRICTS

A. DISTRICT INFORMATION

The Clymer and Panama School Districts are located in the south corner of Chautauqua County, the westernmost county in New York State. School district data and additional information can be found by accessing the school district's web sites and via the New York State Education Department's *A Report to the Governor and the Legislature on the Educational Status of the State's Schools*: <http://www.p12.nysed.gov/irs/Chapter 655>

In addition, New York State school report card information is available at <https://data.nysed.gov/>

B. CONTACTING THE DISTRICT'S

Proposers may contact the following individuals at each school district to request or review information necessary to respond to this proposal:

- Clymer Central School District:
 - Mr. Bert Lictus, Superintendent – 716 355-4444, ext. 2003
(note: Mr. Lictus serves as shared superintendent between Clymer and Panama districts)
- Panama Central School District
 - Mr. Bert Lictus, Superintendent - 716 782-2455, ext. 4446
(note: Mr. Lictus serves as shared superintendent between Clymer and Panama districts)
- Erie 2-Chautauqua-Cattaraugus BOCES
 - Dr. David O'Rourke, District Superintendent - 716 549-4454, ext. 4029

IV. TIME REQUIREMENTS

A. PROPOSAL CALENDAR

The following is a list of key dates, up to and including the date, when proposals are due to be submitted:

Request for proposal issued:	- November 7, 2016
Due date for proposals:	- December 12, 2016
District Officials/Board Members review Proposals	: - on/by the week of December 19, 2016

B. NOTIFICATION AND CONTRACT DATES

Presentation to Joint Boards by Boards] - *Week of January 9, 2017* [if requested
Selected firm(s) notified: - *on/by January 10, 2017*
Contract date: - *January 17, 2016*

C. DATE FEASIBILITY STUDY SHALL COMMENCE

To be determined after the contract date – but as close to *January 17, 2017* as possible.

V. ASSISTANCE PROVIDED BY THE SCHOOL DISTRICTS AND DISTRICT SUPERINTENDENT

The School Districts’ shared Superintendent and necessary staff of each district will be available during the study to assist the recipient firm or individual conducting the feasibility study by providing information, documentation and explanations.

In addition, the District Superintendent shall assist the recipient firm or individual with NYSED requirements and parameters as the study is conducted.

VI. PROPOSAL REQUIREMENTS

A. GENERAL REQUIREMENTS

1. Inquiries concerning the request for proposals and the subject of the request for proposals must be made to:

**Dr. David O’Rourke
District Superintendent
Erie 2-Chautauqua-Cattaraugus BOCES
8685 Erie Road
Angola, NY 14006**

2. Submission of Proposals

The following material is required to be received by **December 12, 2016** for a proposing firm or individual to be considered:

- a. The proposer shall submit three (3) copies of the Technical Proposal which should include the following:

Title page - showing the request for proposals subject, the proposer's name; the name, address and telephone number of the contact person; and the date of the proposal.

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Transmittal Letter - A signed letter of transmittal briefly stating the proposer's understanding of the work to be done, the commitment to perform the work within the time period, a statement why the proposer believes itself to be best qualified to perform the engagement, and a statement that the proposal is a firm and irrevocable offer for services to be rendered.

Detailed Proposal - The detailed proposal should follow the order and format set forth in Section I and II of this Request for Proposals.

Technical Proposal – The technical proposal shall be submitted in accordance with VI(B) below.

- b. The proposer shall submit three (3) copies of a dollar bid in a separate envelope marked as follows:

DOLLAR COST BID PROPOSAL FOR CONDUCTING THE CONSOLIDATION STUDY FOR THE PURPOSE OF CENTRALIZATION OF THE CLYMER CENTRAL SCHOOL DISTRICT AND THE PANAMA CENTRAL SCHOOL DISTRICT.

- c. Proposers should send the completed proposal consisting of the three separate envelopes to the following:

**Dr. David O'Rourke
District Superintendent
Erie 2-Chautauqua-Cattaraugus BOCES
8685 Erie Road
Angola, NY 14006**

**B. TECHNICAL PROPOSAL
(NO DOLLARS SHOULD BE INCLUDED IN THE TECHNICAL PROPOSAL)**

1. **General Requirements:** The purpose of the Technical Proposal is to demonstrate the qualifications, competence and capacity of the proposers seeking to undertake a feasibility study in conformity with the requirements of this request for proposals. As such, the substance of proposals will carry more weight than their form or manner of presentation. The Technical Proposal should demonstrate the qualifications of the proposer and of the particular staff to be assigned to this engagement. It should also specify an approach that will meet the request for proposals requirements. The Technical Proposal should address all the points outlined in the request for proposals (excluding any cost information which should only be included in the sealed dollar cost bid). The Proposal should be prepared simply and economically, providing a straightforward, concise description of the proposer's capabilities to satisfy the requirements of the request for proposals.
2. **Qualifications and Experience:** The proposer shall state the size of the entity, the size of the staff, the location from which the work on this engagement is to be performed and the number and nature of the professional and/or nonprofessional staff to be employed in this engagement.

3. **Specific Feasibility Study Approach:** The proposal should set forth a work plan, including an explanation of the methodology to be followed, including community stakeholder engagement activities, to perform the services required in Section II of this request for proposal. In developing the work plan, reference should be made to such sources of information as the District's budget and related materials, organizational charts, specific meetings that are proposed to be held with stakeholders, etc.
4. **Other Information:** Provide any other information that you believe will assist the School Districts in making their selection. Such information may be in this last section of the proposal or may be represented in one or more appendices.

C. DOLLAR COST BID

1. **Total All-Inclusive Maximum Price for conducting the Consolidation Study for the Purpose of Centralization.** The dollar cost bid should contain all pricing information relative to performing the entire feasibility study. The total all-inclusive maximum price bid is to contain all direct and indirect costs including all out-of-pocket expenses. The School Districts will not be responsible for expenses incurred in preparing and submitting the technical proposal or the dollar cost bid. Such costs should not be included in the proposal.

The first page of the dollar cost bid should include the following information:

- a. Name of proposer;
- b. Certification that the person signing the proposal is entitled to represent the firm, empowered to submit the bid, and authorized to sign a contract with The School Districts;
- c. A total all-inclusive maximum price for feasibility study, stakeholder engagement efforts, and reports.

The second page of the dollar cost bid should include a schedule of professional fees and expenses that support the total all-inclusive maximum price.

2. **Out-Of-Pocket Expenses Included in the Total All-Inclusive Maximum Price.** Out-of-pocket expenses for the proposer (e.g., travel, lodging and subsistence) will be the responsibility of the recipient firm or individual. All estimated out-of-pocket expenses should be included in the Total All-Inclusive Maximum Price for each year. A statement must be included in the dollar cost bid stating the recipient firm or individual will not seek reimbursement for travel, lodging, subsistence, or other out-of-pocket costs incurred in connection with the completion of The School District's' feasibility study separate from the Total All-Inclusive Maximum Price.
3. **Rates for Additional Professional Services.** If it should become necessary for the School Districts to request the consultant to render any additional services to either supplement the services requested in this RFP or to perform additional work as a result of the specific recommendations included in any report issued on this engagement, then such additional work shall be performed only if set forth in an addendum to the contract between the School Districts and the recipient firm or individual. Any such additional work agreed to between the School Districts and the firm shall be performed at the same rates as set forth in the schedule of fees and expenses included in the dollar cost bid.

4. Manner of Payment. Progress payments will be made on the basis of hours of work completed during the course of the engagement and out-of-pocket expenses incurred in accordance with the firm's dollar cost bid proposal. Interim billing shall cover a period of not less than a calendar month.

VII. EVALUATION PROCEDURES

A. EVALUATIONS

Designated representatives from each of the two school districts will evaluate proposals submitted.

B. ORAL PRESENTATIONS

During the evaluation process, the School Districts may, at their discretion, request any or all proposers to make oral presentations. Such presentations will provide proposers with an opportunity to answer any questions The School Districts may have on their proposal. Not all proposers may be asked to make such oral presentations.

C. RIGHT TO REJECT PROPOSALS

A submission of a proposal indicates acceptance by the proposer of the conditions contained in this request for proposal. This acceptance shall be confirmed in the contract between the recipient firm or individual and the Clymer Central School District and Panama Central School District. The School District's reserve the right without prejudice to reject any or all proposals.