



Charlotte-Mecklenburg Schools

Request for Qualification
Student Assignment Reviews
Consulting Services

February 2016

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**Notice to Prospective Student Assignment Review Consulting Service Providers
February 2016**

To: All Invited Prospective Student Assignment Review and Consulting Service Providers

Re: Charlotte-Mecklenburg Board of Education Request for Proposals for Student Assignment Review Consulting Service Providers

Charlotte-Mecklenburg Schools is soliciting responses from individuals and firms qualified to provide the services referenced during the Board's review of current student assignment policies and plans as well as their development of amended policies and an associated plan. The RFP contains the following:

- 1) General Invitation
- 2) Letter to prospective proposers
- 3) Scope of Work description
- 4) Insurance Requirements
- 5) RFP Instructions to Submitting Firms and Questionnaire
- 6) Selection Procedure Information
- 7) Form of Acknowledgement
- 8) MWSBE Information

Two (2) completed copies of the RFP response must be emailed sent or hand delivered to:

**Charlotte-Mecklenburg Schools (CMS)
P.O. Box 30035
Charlotte, NC 28230-0035
Attention: Scott McCully, Executive Director, Student Planning and Placement**

Responses must be clearly marked identifying the "Proposals for Student Assignment Review Consulting Services", Attention: Scott McCully on the front of the envelope and received no later than **5:00pm on Friday, February 26th**.

The procurement of the Student Assignment Review Consulting Services contract will be based on the RFP and the Proposer's response. A selection committee will review and evaluate the RFP responses and may select individuals and firms to be interviewed.

All questions should be submitted via email to Scott McCully at scott.mccully@cms.k12.nc.us no later than **5 business days** prior to the due date. An email response will be provided within 48 hours and at least 24 hours prior to the due date.

We thank you for your interest.

Section 1 - ADVERTISEMENT

Charlotte-Mecklenburg Schools (CMS) is soliciting information from individuals and firms interested in providing Student Assignment Review Consulting Services.

Two (2) copies of the RFP response, including one (1) original signature set, are to be signed, enclosed in a sealed envelope and submitted to the attention of Scott McCully, P.O. Box 30035, Charlotte, NC 28230 no later than **5:00 PM on Friday, February 26, 2016**. Any proposals received after this date and time will be returned unopened.

The requirements of the Charlotte-Mecklenburg Schools MWSBE program are included as part of the RFP package. CMS MWSBE Coordinator Chiquitha Lloyd can be contacted at 980-343-8638 for further information.

The Board reserves the right to select, re-advertise and/or reject any proposal for any reason including apparent conflicts of interest.

Section 2 - INTRODUCTION AND OVERVIEW

Vision:

Charlotte-Mecklenburg Schools provides all students the best education available anywhere, preparing every child to lead a rich and productive life.

Mission:

The mission of CMS is to maximize academic achievement by every student in every school.

Core Beliefs and Commitments:

We believe that:

- Public education is central to our democracy;
- We are responsible for building and maintaining high performing organizations that ensure all students will successfully acquire the knowledge, skills and values necessary for success;
- Our principals and teachers make the critical difference in student achievement; and
- Engaging the student's family and the community in the education process enhances learning and academic achievement.

As part of Board Policy JCA, Guiding Principles for Student Assignment, the Board “shall consider undertaking a comprehensive district-wide review of the student assignment plan every six years.” The Guiding Principles were adopted by the Board on August 10, 2010 and incorporated into the policy on November 9, 2010. Based on the adoption date, review of policy and plan began in early spring 2015 for 2017-18 plan implementation.

Prior to 2010, the last magnet review was in 2008. This was primarily a program review that did not include student assignment (transportation and attendance zones did not change). Program data, such as demographics, wait pools, application data, student achievement, were presented. Throughout the summer of 2008 community meetings were held in each Learning Community to receive public input. There were Board work sessions to provide updates and advance decision making. All community sessions as well as the Board work sessions were facilitated by an outside consultant. As a result of the magnet review, there was a reduction/consolidation of magnet programs that were not effective.

The results of the student assignment plan must comply with State and federal law. Consultants that submit proposals should have access to resources that would allow them to become familiar with laws and case law related to student placement programs, including the recent United States Supreme Court case, *Parents Involved in Community Schools v. Seattle School District*, 551 U.S. 701 (2007).

The CMS Board of Education (the “School District”), is requesting Consultants to propose services to guide and facilitate a comprehensive student assignment review, and to support developing student assignment options that support the following draft goals:

- Reduce the number of schools with high concentrations of poor and high needs children; and
- Preserve and expand schools and programs in which students are successfully achieving the Mission and Vision of the Board; and
- Provide school assignment options to students assigned to schools that are not meeting performance standards established by the state; and
- Maximize the use of school facilities, transportation and other capital and operational resources to reduce overcrowding and promote equitable access to varied and viable programmatic options for all children.

SCOPE OF SERVICES

The RFP timeline aligns with our overall student assignment plan timeline located here:

<http://www.cms.k12.nc.us/cmsdepartments/StudentPlacement/PlanningServices/20172018StuAsgnReview/Pages/Timeline.aspx>

Issuance of RFP	February 12, 2016
Submission of Proposals and Opening	February 26, 2016
Finalist Interviews	March 10 – 11, 2016
Selection of Consultant	March 16, 2016
Consultant Engagement (Phase 1)	April 2016 – June 2016; July 2016 – November 2016

The scope of services is specific to Phase I of the overall student assignment review. Elements of the work should include:

- Alignment with CMS Board of Education Core Student Assignment Goals
- Inclusion of feedback garnered via community surveys, focus groups and other associated means of gathering community input
- Guidance for developing revised Guiding Principles and associated policies for student assignment
- An approach to reviewing district data; national research, data and urban district benchmarks.
- Coordination among the Board of Education and district leaders and teams supporting the student assignment review and planning process.

The consultant will provide the following services for the School District related to the Student Assignment Review and Plan:

- Advisement, as needed, on development of Board of Education guiding principles and associated policies
- Development of viable student assignment options that reflect community input, Board of Education student assignment policies, goals, guiding principles, timelines, and School District resource availability
- Advisement to Board of Education and School District leadership on student assignment plan development, including a high-level implementation plan that supports the Board's goals and incorporates preferred student assignment options
- Advisement on a communications strategy and plan in consultation with the district's Office of Communications
- Facilitation of Board of Education and school district leadership meetings related to the student assignment review and plan

NOTE: The District will provide data collection and analysis, project management, and community engagement services. The consultant is not responsible for these services, but will partner with District to ensure these services meet the needs of the project.

Section 3 - GENERAL INFORMATION

The procurement of the Student Assignment Review Consulting Services contract will be based on the RFP and the Proposer's response. A selection committee will review and evaluate the RFP responses and may select firms to be interviewed.

Request for Explanation and Information

The School District will host an informational conference call meeting for all interested proposers on February 17, 2016 at 1:30 p.m. Eastern (conference call number provided upon request) to describe the student assignment review and plan in further detail and answer questions.

CMS has sole discretion and reserves the right to reject any and all responses received with respect to this RFP and to cancel the RFP process at any time prior to entering into a formal agreement. CMS reserves the right to request additional information or clarification of information provided in the response without changing the terms of the RFP.

Section 4 - SUBMISSION REQUIREMENTS

Responses should be prepared and submitted as described in this section.

Proposers bear the responsibility of examining all parts of this RFP and furnishing the information required by this RFP. The Proposer shall prepare his/her response and one (1) electronic copy (PDF) and one (1) original signature set clearly marked original. All costs incurred in the preparation and submission of proposals shall be covered by the Proposer. All blank spaces on the Proposal Execution Page and all requirements outlined in this RFP must be filled in and completed.

Submittals shall be made on 8.5" x 11" paper, side bound with Table of Contents and reference tabs for key sections. Response is limited to 25 pages single sided excluding qualification information. All pages are to be numbered. Proposers shall submit proposals in a sealed envelope to Charlotte-Mecklenburg Schools, P.O. Box 30035, Charlotte, NC 28230, Attention: Scott McCully. **The sealed envelope shall carry the following information on the face of the envelope: Proposer's name, address, and subject matter of response.**

Each Proposer must answer all questions and provide all requested information, where applicable. If the answer to any questions is "none" or if the question is not applicable, please state in writing. Any Proposer failing to do so may be deemed to be non responsive with respect to this RFP at the sole discretion of CMS.

A selection committee will make reasonable investigations as deemed proper to determine the ability of each proposer to perform the work. The Proposer shall be responsible to furnish all information and data requested by the RFP. CMS reserves the right to reject any proposal if the information submitted by or investigations of the Proposer fail to satisfy CMS that the Proposer is qualified.

Where proposals are sent by mail, the Proposer shall be responsible for their delivery before the advertised date and hour for the receipt of the proposals. **Submittals must include, at a minimum, the following:**

1. Executive Summary limited to three (3) pages including the name of the Proposer, location of Proposer's principal place of business, a brief narrative description including the age of the business, type of business organization and services offered. Summary should describe the Proposer's approach to providing Student Assignment Review and Plan Consulting Services as described in the Introduction and identify the Proposer's strengths and any special qualifications you/your firm and proposed sub-consultant firms may possess related to the program described. Describe your firm's and proposed sub-consultant firms approach to student assignment review and planning.

Consultant should provide examples that demonstrate ability to

- a. Advise Board of Education and school district leaders on student assignment plan
 - b. Facilitate outcomes-driven meetings with Board of Education and school district leaders
 - c. Develop school assignment options
 - d. Incorporate historical knowledge and trends into school assignment options
 - e. Serve as credible student assignment plan expert
2. Cost to provide services during phase I including hourly/daily rate, travel, etc.
 3. Insurance Requirements – Proposers must show proof of insurance coverage meeting the requirements identified in Section 5 (submit a copy of insurance certificate)
 4. Completed response to Section 6 – Qualifications/Proposer Information
 5. Completed Section 7 - Proposal Execution Acknowledgement Form
 6. Complete required documents included with MWSBE Information (Section 8)

Section 5 - INSURANCE REQUIREMENTS

Minimum limits for the following types of insurance are required:

Worker's Compensation:

1. N.C. Statutory Requirements
2. Employers Liability
\$500,000 – Each Accident
\$500,000 – Disease Policy Limits (Aggregate)
\$500,000 – Disease Each Employee

Comprehensive General Liability:

Limits of coverage shall not be less than:

- | | |
|--|---|
| 1. Bodily Injury Liability including contractual liability coverage
Assumed under the indemnity agreement of the contract,
Products/completed operations and underground property
damage XCU where applicable. | \$1,000,000 each occurrence
\$2,000,000 annual aggregate |
| 2. Property Damage Liability including contractual liability
Coverage assumed under the indemnity agreement of the
Contract, products/completed operations and undergoing
Property damage XCU where applicable. | \$1,000,000 each occurrence
\$2,000,000 annual aggregate |

Comprehensive Automobile Liability:

Comprehensive Automobile Liability Insurance shall be maintained by the Construction Manager as to the Ownership, maintenance and use of all owned, non-owned, leased or hire vehicles with limits of not less than:

- | | |
|--|--|
| 1. Automobile Liability – All owned, non-owned and hired
vehicles | \$1,000,000 each person
\$2,000,000 each occurrence |
| 2. Automobile Property Damage Liability – all owned,
non-owned and hired vehicles | \$1,000,000 each occurrence
\$2,000,000 aggregate |
| 3. Umbrella liability limits shall not be less than | \$2,000,000 each occurrence |
| 4. Architects Professional Liability Insurance | \$1,000,000 |

Section 6 - QUALIFICATIONS/PROPOSER INFORMATION

Please organize your responses to questions below in the same order and numbering given, restating the question first, then your responses.

1. Company history, size and background
 - a. Provide current organizational structure information, date of company formation and the number of years providing Student Assignment Review Consulting Services for K-12 education or higher education.
 - b. Provide the name, position, percentage ownership and years with the organization for each officer or partner.
 - c. Provide names and professional background of other company principals intended to be used on the proposed CMS work.
 - d. Provide the total number of staff directly employed by the firm regularly engaged in K-12 work. Only include the staff/office that will directly participate in this CMS work. Provide an organizational chart that represents this staffing and their relationship to the organizational management structure.
2. Financial Information - CMS reserves the right to request financial data. If requested provide a copy of audited financial statements for the three (3) previous fiscal years and the last quarterly report. Statements must include auditor's letter of opinion, auditor's noted balance sheet, statement of income/loss.
3. Provide information on no less than two (2) K-12 projects for which you/your firm has provided similar type services during the past five years. Information should include:
 - a. Name and address of project
 - b. Names of staff that participated
 - c. Name, address and phone number for Owner's Representative
 - d. Type and size of project
 - e. Actual Cost
 - f. Duration
4. Review the CMS Student Assignment Plan, policies and regulations. Explain how your agency's work with the Board, executive and senior leadership will support and promote movement towards the development of revised Guiding Principles, policies and regulations, and a student assignment plan framework based on the Board's draft goals for student assignment.
5. Provide experience and background information on key individuals proposed for the project
 - a. Name 2-3 educational projects completed by your proposed project key individuals in the last 5 years. Describe their role in these projects.
6. Client References
 - a. Provide a minimum of three (3) client references. Two (2) of the client references should be from Owners similar in function to CMS. Information should include contact name, address, phone number, email and a description of services provided.

7. Indicate any project(s) where your firm has been terminated and the reasons for termination.
8. Has your firm or any of its owners, officers or partners ever been found liable in a civil suit, found guilty in a criminal action for making any false claim or material misrepresentation to any public agency or entity, or been convicted of a crime involving any federal, state or local law?

If YES, explain on a separate signed page, including identifying who was involved, the name of the public agency, the date of the investigation and the grounds for the finding.

9. Has your firm or any of its owners, officers or partners ever been convicted of a federal or state crime of fraud, theft, or any other act of dishonesty?
10. Indicate any prior or current Professional Development contracts between your firm and Charlotte-Mecklenburg Schools.
11. Respondents shall comply with CMS's MWSBE Program by making a good faith effort to utilize MWSBE firms in the service contract. Each respondent to the solicitation shall indicate in their proposal if they customarily self perform or subcontract portions of the identified scope of work. A Minority, Women, and Small Business Utilization Commitment Form should be submitted if the contractor intends to utilize an M/W/SBE firm under the contract in a joint venture, subcontracting and/or material supplier capacity
12. Does your firm or any associate consultant own any business or financial interest that would place the firm in a conflict of interest?

Section 7 - PROPOSAL EXECUTION ACKNOWLEDGEMENT FORM

The undersigned hereby acknowledges having received and completed a proposal package.

FOR A SOLE PROPRIETOR OR PARTNERSHIP: If a sole proprietorship, the sole proprietor must sign this proposal. If a partnership, the proposal must be signed by a general partner and indicate authority of partner's signatory by attaching a copy of partnership agreement or other authorizing document.

FOR A CORPORATION: If signed by any person other than the President of the Corporation, a certified copy of resolution or by-laws authorizing such person to sign must accompany this proposal/response. The signature of the corporation signer must be attested to by the Secretary of the Corporation.

The undersigned warrants that they are duly authorized to bind the Proposer to fully perform all duties and deliver all services in accordance with the terms and conditions set forth herein. The undersigned declares under penalty of perjury that all of the information submitted is true and correct, that the Proposer fully understands this information is being considered for this RFP only and that being declared non-qualified for this project excludes the Proposer from award of this project.

The undersigned acknowledges receipt of addenda: _____

The undersigned agrees to be bound by and comply with the provisions of CMS's Minority, Women and Small Business Enterprise Program.

I, the undersigned, certify and declare that I have read all the foregoing responses to this RFP and know their contents. The responses are true of my own knowledge and belief, except as to those matters stated on information and belief, and as to those matters I believe them to be true. I declare under penalty of perjury under the laws of the State of North Carolina, that the foregoing is correct.

All signatures to be sworn to before a Notary Public

Signed _____

Firm Name _____

Title _____

Address _____

Telephone _____

City _____

State _____ Zip _____

Corporate Seal – (requested, not required)

SUBSCRIBED AND SWORN to before me this

_____ Day of _____ 2014

Notary Public Signature

STATE OF _____

COUNTY OF _____

Section 8 – CMS Minority, Women, Small Business Enterprise Program

Request for Qualifications M/W/SBE Participation Guidelines for Goods and/or Contracted Services

Charlotte-Mecklenburg Board of Education promotes full and equal access to business opportunities with Charlotte-Mecklenburg Schools. Minority-owned, women-owned, and small business enterprises (collectively “M/W/SBE”) as well as other responsible vendors shall have a fair and reasonable opportunity to participate in Charlotte-Mecklenburg Schools (CMS) business opportunities.

The aspirational goals for M/W/SBE participation are listed below:

Category	MBE Goal	WBE Goal	SBE Goal	Overall M/W/SBE Goal*
Contracted	5%	4%	5%	14%
Goods	3%	3%	5%	11%

*M/W/SBE categories: Black, African American (**B**), Hispanic (**H**), Asian American (**A**) Native American Indian (**N**), Female (**F**), Small (**S**), or Socially and Economically Disadvantaged (**D**)

Each bidder or respondent to the solicitation shall indicate in their bid/proposal if they customarily self perform or subcontract portions of the identified scope of work. A Minority, Women, and Small Business Utilization Commitment Form should be submitted if the contractor intends to utilize an M/W/SBE firm under the contract in a joint venture, subcontracting and/or material supplier capacity.

Failure to respond and/or complete the MWSBE Utilization Commitment Form prior to submittal may render bid or proposal response invalid.

Do you customarily subcontract portions of your Contracts and projects with Charlotte-Mecklenburg Schools?

_____ Yes _____ No

Do you intend to subcontract portions of this Contract?

_____ Yes _____ No

List any services in this proposal for which you could seek quotes from minority/women owned or small businesses.

1. _____
2. _____
3. _____

M/W/SBE UTILIZATION COMMITMENT FORM FOR PURCHASES OF GOODS & OTHER SERVICES

We, _____, do certify that on

(Service Provider)

_____ (Project) _____ (Contract Amount)

If the bidder intends to subcontract, this form must be completed regardless of the amount or lack of M/W/SBE participation attained.

We will expend a minimum of _____% of the total dollar amount of the Contract with Minority Business Enterprises, _____% with Women's Business Enterprises and _____% with Small Business Enterprises.

Category	MBE Goal	WBE Goal	SBE Goal	Total M/W/SBE Goal
Contracted Services	5%	4%	5%	14%
Goods	3%	3%	5%	11%

*M/W/SBE categories: Black, African American (**B**), Hispanic (**H**), Asian American (**A**) Native American Indian (**N**), Female (**F**), Small (**S**), or Socially and Economically Disadvantaged (**D**)

The undersigned will enter into a formal agreement with Minority/Women/ Small Business Enterprise for work listed in this schedule conditional upon execution of a contract with the Charlotte-Mecklenburg Board of Education. **Failure to fulfill this commitment may constitute a breach of the contract.**

A list of County certified M/W/SBE bidders available to offer quotes and prices as subcontractors is available on the Internet at <https://www.ips.state.nc.us/ips/vendor/searchvendor.aspx?t=h>

If you need additional firms, which offer other services, or if you have any questions concerning the M/W/SBE provision, contact the M/W/SBE Administrator at 980-343-8638.

Date: _____

Name of Company

Name, Title and Signature

Proposed Product or Service

Total Dollar Amount Bid