

Request for Proposals
Building Condition Survey Services
RFP 0307-25

January 28, 2025



City School District of
ALBANY

Attention: Purchasing Agent
Address: City School District of Albany
1 Academy Park
Albany, NY 12207
Phone: (518) 475- 6050
Fax: (518) 475- 6054

RESPONSES DUE BY: 2:00 PM on March 7, 2025
GENERAL INFORMATION/CONDITIONS

Statement of Purpose:

The City School District of Albany (hereinafter, City School District of Albany may be referred to as “the District”) is soliciting proposals for the purpose of district-wide building condition survey. Proposals must follow the outline set forth in this document. Please submit one original and two (2) copies of the completed qualifications and other requirements of the RFP, by hand delivery, regular mail, or courier to the address listed on the cover page. The District must receive the proposal by the date indicated in the timeline below.

General Information:

The City School District of Albany operates eleven elementary schools, four middle school buildings, and one primary high school facility with extended programs in two additional buildings. The student population is approximately 8,900 with a total staff of approximately 1,700. In addition to neighborhood schools, the District includes several magnet schools and programs, as well as other innovative academic opportunities for students.

TIMELINE

A. Mailing of Requests for Proposal:

Date: January 28, 2025

B. Submission of Requests for Information (Clarifying Questions)

Date: March 4, 2025, 2:00pm

C. Responses to Requests for Information

Date: March 6, 2025, 12:00pm

B. Deadline for submission of proposal to the Purchasing Agent (must receive by):

Date and time: March 7, 2025, 2:00 PM

C. Evaluation of proposals and selection of the responder(s) to be recommended:

Date: March 17, 2025

D. Approval by the Board of Education (tentative):

Date: March 27, 2025

E. Effective date of award (tentative):

Date: March 28, 2025

GENERAL REQUIREMENTS

Instructions to Responders:

The City School District of Albany prohibits employees (or entities in which the employee has a financial interest, or from which the employee receives compensation) from contracting with the District to provide goods or services as an independent contractor.

The submission of a proposal will indicate that the responder (1) has read the instructions, (2) will abide by the terms and conditions governing this Request for Proposal, and (3) understands the requirements for delivery of the services specified.

General Instructions:

1. Specifications contained in the Request for Proposal are for the primary deliverables listed herein; district-wide building condition surveys, a communications plan and the development of a 5 Year Plan drawing from multiple input sources
2. Minimum requirements are specified. The responder may choose to exceed those minimums. **For the purposes of this RFP, the words “will”, “shall”, “expected” and “responsible for” mean the same; that the respondent shall be required to perform, prepare, provide, or otherwise execute the stated requirement in alignment with the deliverable and context listed. This applies to the respondent’s proposal and for all deliverables if awarded the work.**
3. Failure to provide sufficient and required information may result in the proposal being rejected by the District as non-responsive and not being considered.
4. Each proposal must be clearly marked on the outside of the envelope with the title RFP 0225-25 District-Wide Building Condition Survey & 5 Year Plan” – TO BE OPENED BY ADDRESSEE ONLY. Please ensure your organization’s name is included on the outside of the package. If you are using a commercial delivery company that requires the use of their shipping package or envelope, your proposal must be placed within a second sealed package labeled as detailed above. This will ensure your proposal is not prematurely opened.
5. Original proposal with two copies are to be mailed or delivered to: City School District of Albany, 1 Academy Park, Albany, NY 12207, Attn: Purchasing Agent; to arrive no later than the closing date and time specified in the timeline provided herein. Any received after that time will not be opened, and will be returned only upon request by, and at the expense of, the responder(s). The responder(s) will assume total responsibility for delivery of their proposal on time at the place specified, whether sent by mail or delivered in person.
6. Telephone, facsimile, or telegraphic proposals are not acceptable. Unless otherwise specified, submission by email is not permitted.

7. To assist any and all vendors in obtaining a clear understanding of the requirements of this proposal, vendors may present clarifying questions. Questions regarding this proposal must be submitted in writing via email to purchasingagent@albany.k12.ny.us by 2:00 PM on March 4, 2025. Responders must also provide in writing one working email address of where the District should direct its response to any questions. Responses to questions will be answered via email by **Don Opperman, Director of Facilities Planning** by March 6, 2025. The District is not responsible for non-working email addresses. District responses will also be shared with other potential proposers if they are known to the District.

RFP TERMS AND CONDITIONS

1. The issuance of this RFP request constitutes only an invitation to submit a response to the District. If the school District chooses to award the RFP to a selected vendor, the vendor must complete a contract with the District. The form and content of the contract will be determined by the District.
2. This Proposal request does not commit the District either to award a contract or to pay any costs incurred in the preparation of a submission. Responders shall bear all costs associated with submission preparation, submission and attendance at presentation interviews, or any other activity associated with this Proposal request or otherwise.
3. All proposals and accompanying documentation become the property of the City School District of Albany. The District shall not divulge any information presented to anyone outside the District, unless required by law, without the written approval of the individual or firm. The District reserves the right to use the information and any ideas presented in any submission in response to this RFP request, whether or not the submission is accepted. Submitted proposals may be reviewed and evaluated by any person or outside consultant retained by the District, other than one associated with a competing applicant, as designated by the District. If a vendor believes that any information in its proposal constitutes a trade secret and wishes such information not be disclosed if requested by a member of the public pursuant to the State Freedom of Information Law, Article 6 of the Public Officers Law, the vendor shall submit with its proposal a letter specifically identifying the page number, line or other appropriate designation, that information which it deems to constitute a trade secret and explain in detail why such information is a trade secret. Failure by a vendor to submit such a letter with its proposal identifying trade secrets shall constitute a waiver by the applicant of any rights it may have under Section 89 (Subdivision 5) of the Public Officers Law relating to protection of trade secrets.
4. The District neither makes nor assumes any contractual obligation by issuing this RFP request, receiving and evaluating responses, or making preliminary responder selections. Providing a response as provided herein shall neither obligate nor entitle a responder to enter into a contract with the District.
5. The District reserves the right to determine in its sole and absolute discretion whether any aspect of the vendor's submission satisfactorily meets the criteria established in this RFP request, the right to seek clarification from any Responder(s), and the right to cancel and or amend, in part or entirely, the RFP request, at any time prior to a written contract.
6. It is understood that any submission received and evaluated by the City School District of Albany will be used as the basis for the cost and terms of a contract between the District and the particular responder. In

submitting a response, it is understood by the responder that the District reserves the right to accept any submission, to reject any and all submissions and to waive any irregularities or informalities that the District deems is in its best interest.

7. The District is not obligated to respond to any submission nor is it legally bound in any manner whatsoever by the submission of a response.
8. Each response shall be reviewed for completeness and for the technical and administrative requirements of the RFP request. This includes completion of Appendix items A-F. The District has the option of requesting the responder to submit missing information or provide clarification of those issues deemed incomplete, or disqualifying the proposal. A proposal may be disqualified for lack of response to such a request.
9. RFP's submitted to the District must be valid for a period of at least 120 days from the deadline for receipt of proposal responses as defined in the time frame section of this document.
10. The selected vendor's proposal will become part of any resulting legal contract, should contracts be awarded, including any written clarifications as required and mutually agreed by the parties. The term of the resultant contract shall commence upon award and shall remain in effect until completion, inspection, and final acceptance of specified deliverables unless terminated, cancelled, or extended as otherwise provided herein. The contract shall run the duration of the project with a target completion date of June 30th, 2026.
11. Each proposal must include the appropriate corporate officer's approval signature.
12. It is a requirement that responders indicate specifically in the response any sub-contract, alliance, partner, franchise, or other "non-employee" relationship with any resource(s) they will utilize if they are chosen as the selected proposal. Note: The District reserves the right to approve and designate sub-contractors to be used in any of the services being proposed.
13. The City School District of Albany reserves the right to introduce additional factors not contained in this RFP request in order to obtain the most suitable solution. After submitting a proposal, each respondent must be prepared to have the operational aspects of their proposal reviewed in detail by District representatives.
14. Proposals shall be opened publicly at the District's Central Office location, or other duly designated location, on the "received by" date and time indicated on the cover page. The name of each responder shall be read publicly and recorded. Unless disclosure of final proposal pricing would constitute an impairment of negotiations, the proposed bid, cost, or sum of each proposer will be read publicly as well. The content of proposals shall not be subject to public inspection until after contract award. After contract award, proposals may be reviewed unless they, in total or in part, contain information which is exempt from disclosure pursuant to the Freedom of Information Law (e.g. a trade secret).
15. At any time prior to the specified proposal due time and date, a responder (or designated representative) may withdraw their proposal.

16. The District reserves the right to award contracts for individual projects or for any combination of projects deemed to be most advantageous to the District. Notwithstanding any other provision of the RFP, the District expressly reserves the right to:

- Waive any immaterial defect or informality; or
- Reject any or all proposals, or portions thereof; or
- Reissue an invitation for proposal.

17. The District Board of Education reserves the right to award a contract in the best interest of the District. The Board of Education's decision will be final.

Responders Default – Failure of the Responders to comply with any of these provisions may be considered reason for rejection of the Proposal.

ATTACHMENT A – PROJECT DETAILS

ATTACHMENT B – SIGNATURE PAGE

ATTACHMENT C – FEE STRUCTURE AND DISCLOSURE

ATTACHMENT D – INSURANCE REQUIREMENTS

ATTACHMENT E – PROPOSAL (SUBMITTAL) REQUIREMENTS

ATTACHMENT F – CSDA INITIAL LISTING OF CHALLENGES & NEEDS

ATTACHMENT A – PROJECT DETAILS

Project Overview

NOTES:

“AE” refers to the Architectural / Engineering firm that will be selected to perform the work herein.

BCS refers to Building Condition Survey or Surveys

“CSDA refers to the City School District of Albany, the client.

NYSED refers to the New York State Education Department

The City School District of Albany (CSDA) is soliciting proposals to conduct detailed building condition surveys (BCS) and analysis of its facilities, grounds, and miscellaneous structures on district owned properties, identification of current facility condition deficiencies, recommend corrections for deficiencies, prepare cost estimates for corrections, and forecast future capital renewal costs.

The District seeks to understand (1) the general condition of all buildings and major components; (2) the annual maintenance costs for each building ; and (3) the timing and cost of future building component maintenance, repair and replacement. This data will serve as input to the development of a comprehensive 5-Year capital project plan.

The assessment will include the existing buildings at 20 sites that occupy an estimated 1,850,000 square feet. The following are the properties of the District to be studied:

Building	Address
Albany High School	700 Washington Avenue
Abrookin Career and Technical Center	99 Kent Street
Albany International Academy	50 North Lark Street
North Albany Middle School	570 North Pearl Street
Myers Middle School	100 Ebel Court
Hackett Middle School	45 Delaware Avenue
Tony Clement Center for Education	395 Elk Street
Albany School of Humanities	108 Whitehall Road
Arbor Hill Elementary School	1 Arbor Drive
Delaware Community School	43 Bertha Street
Eagle Point Elementary School	1044 Western Avenue

Giffen Memorial Elementary School	274 South Pearl Street
Montessori Magnet School	45 Tremont Street
New Scotland Elementary School	369 New Scotland Avenue

Roots Academy at West Hill	676 Clinton Avenue
Pine Hills Elementary School	41 North Allen Street
Sheridan Preparatory Academy	400 Sheridan Avenue
Thomas O'Brien Academy of Science & Technology	94 Delaware Avenue
Academy Park District Office	1 Academy Park
Harriet Gibbons Student Services Center	81 Watervliet Avenue

Project Objectives

- A. To review, and update the existing inventory of buildings, systems, equipment, and infrastructure assets across the District;
- B. To identify and calculate estimates for each proposed project;
- C. To rank and prioritize all projects by development of a custom rank order algorithm
- D. To estimate the cost of and provide the list of required equipment and facilities maintenance for each building;
- E. To enhance facility planning capabilities by addressing the highest priority needs and future needs;
- F. To provide recommendations for improving facilities through the development of 5 year capital project budgeting, establishing a facility condition baseline by asset type for goal setting, and progress tracking.
- G. To seek expertise in potential historic facility renovations and the feasibility of those necessary upgrades to meet current learning space requirements.

Scope of Work

Detailed scope of work requirements are listed under each Project phase below.

A summary of more significant scope of work requirements includes:

- 1) Perform a thorough review of existing documentation including prior cycle Building Condition Surveys, 5 Year Plan and related documents.
- 2) Prepare a plan and timeline for accessing all Facilities to perform the required work.
- 3) Provide detailed inspections and assessments of facilities in accordance with NYSED requirements. by licensed architectural, engineering, or other equivalent professionals and submit those as required. Using the observations and data collected, create a master listing by asset type (Ex. Roofing) that ranks the overall condition of that asset type using mutually agreed characteristics.

The assessment will include existing facilities at 20 sites listed above.

- 4) Conceive, introduce, explain and refine with District input a comprehensive communications plan for the creation of the 5Year Plan, all phases.
- 5) Conceive, introduce, explain and refine with District input a system to assign a priority ranking to each potential 5Year Plan line item in an equitable and transparent manner.
- 6) Provide professional estimating services to prepare estimates for each potential 5Year Plan line item along with written assumptions, escalation and contingency factors.
- 7) Prepare a comprehensive 5Year Plan utilizing the results of the Building Condition Surveys, an independent Facility Conditions Assessment, and wide-ranging stakeholder input from the District.

The Project will consist of the following phases:

- | | |
|------------------|--|
| Phase I | Facility Assessment Planning and Document Review |
| Phase II | On-Site Building Condition Surveys |
| Phase III | Analysis of Facility Conditions Assessment Information and |
| Phase IV | Building Condition Survey Report Preparation |
| Phase V | Preparation of Strategic 5YR Plan |

A.Phase I Facility Assessment Planning and Document Review

Core Deliverables:

- 1) Create a logistics plan and timeline for accessing all District facilities to perform the work required herein. Include team size, durations, key targets, whether occupied spaces or not, etc. and corresponding timeline.
- 2) Perform a thorough document review of the prior cycle Building Condition Surveys as well as the prior cycle 5 Year Plan and all related documentation. Leverage this information to establish a baseline of understanding and what scope items were completed from the previous 5 Year Plan.

Phase 1 Facility Access Logistics Plan

The AE is responsible for developing a logistics plan for accessing all facilities across the District. There are many areas at each facility that can be inspected with minimal or no impact to the normal operation of the facility. There are others that require more consideration as to time of year and time of day to limit impact. The expectation is that the AE will leverage their prior experience with this work to create an access template for a given facility that can serve as the basis for other similar facilities, making changes as needed for hours of operation, facility layout, usage and so forth. In developing the plan, the AE is expected to level the work content time required so that an efficient access plan emerges allowing adequate and equitable time to perform thorough assessments at all facilities. While it is understood that Summer months provide less

challenges, CSDA does not wish to limit access to this period only. AE will present the logistics plan template to the CSDA leadership team for review and comment, then incorporate those comments into the final template and complete the District wide plan accordingly. The AE will schedule resource teams according to the plan. It is expected the plan will be followed, be updated with progress over time and that reasonable changes will be required to account for unforeseen conditions.

The AE will provide a project memorandum for review and approval by the Director of Facilities Planning which briefly explains the purpose for the assessments, what is to be included in the assessment, and a proposed schedule for each facility. This concise deliverable will form the basis of communication with each building Administrative team so they have a clear understanding of the general BCS process, what to expect, when to expect it and the impact to their facility. Timely, concise and informative communication is the expectation for all work to be performed at CSDA facilities. Further that once approved in concept that the AE will be responsible for sending those communications and responding to related questions from CSDA staff members.

Security

Like all school districts, security is paramount to daily operations whether school is in session or not. As such, the AE must maintain the accuracy of the Project team member organization chart for all resources working on the project. All team members who will be accessing CSDA facilities will be screened for security purposes. The AE must provide any and all information reasonably expected to facilitate these security screenings over the entire duration of the Project. Should CSDA be made aware of an issue the AE will be contacted in writing and the AE is expected to take reasonable / immediate action depending on the nature of the issue. ALL requirements apply to any subcontractors or consultants working under the AE and it shall be the AE's responsibility to ensure their compliance. Failure of team members to follow CSDA policy or comply with reasonable requests will result in those individuals being barred from accessing CSDA facilities.

B.Phase II On Site Building Condition Surveys

Core Deliverables

Perform thorough inspections, assessments and collect data for all property elements required by NYSED.

Prepare Building Condition Survey documentation for all CSDA facilities, based on the assessments performed, and fully compliant with all applicable requirements.

Conduct a detailed on-site condition assessment for each facility and infrastructure in the district's portfolio. The assessment should be structured and include all necessary information to assign an industry standard building system classification.

The on-site assessment will include entering accessible crawl spaces and attic spaces. The on-site

assessment will be performed using both component-level and system-level inspection methods. The assessment team will evaluate each asset to determine whether sufficient evidence is available to warrant complete replacement of the system, or if repairing only portions of the system is preferable or more cost effective. For assessment of systems, the current, as-found status of all components of that system must be documented to ensure an accurate report of the system as a whole.

The following minimum assessments will be accomplished:

- A. Identify all maintenance, repair, and replacement requirements including recommendations from the energy efficiency audit to enhance operations.
- B. Recommend upgrades and improvements where applicable, considering efficiency, reliability and environmental improvements.
- C. Assess real plant property such as buildings, structures, and utilities and their integral components/systems. Copies of the building floor plans and maintenance history records when available will be provided to the consultant.
- D. Perform a thorough visual assessment of all architectural, civil/structural, mechanical, electrical, fire, plumbing, and control/systems of each facility.
- E. Identify and report all deficiencies across disciplines and recommend upgrades and/improvements.
- F. Identify and immediately report to the district leadership components or situations that are considered urgent (endangering life and/property or Code compliance issues).
- G. The building condition survey will focus on all required property elements following the BCS format. The AE will recommend any additional subcategories, not already captured in the BCS format, as appropriate

Site Utilities

Site Features

Building Structure

Building Envelope

Building Interior

HVAC Systems

Plumbing

Fire Suppression System

Electrical Systems

Security

Code

Student Transportation Facility

Accessibility

Environment / Comfort / Health

Indoor Air Quality

Emergency Shelter

Space Adequacy Equipment

The AE is responsible for completing a Building Condition Survey (BCS) for all CSDA facilities. All work shall be performed in accordance with all applicable NYSED requirements for the subject deliverables per Education Law 409-d Comprehensive Public School Building Safety Program and 8CRR-NY 155.4 Uniform Code of Public School Building Inspections, Safety Rating and Monitoring, latest revisions. By responding to this RFP the AE is certifying they are fully knowledgeable of and have the requisite knowledge, expertise and qualifications to perform the work in full compliance with the applicable Code Rules and New York State Education Department requirements. Missing, contradictory or inaccurate references in this section shall not be accepted as justification for incomplete or non-compliant Building Condition Surveys. The AE is responsible for entering all information in the NYSED Application Business Portal once provided credentials and application entitlements (user rights) by the Superintendent as well as notifying the Superintendent that the documents are complete and ready for certification and submission. The AE is solely responsible for ensuring all documentation for submission is accurate and complete. The AE is solely responsible for ensuring that related project milestones are met to enable completion of surveys by 31 December 2025 and enable submission of the documentation to NYSED as soon as practicable but not later than 1 March 2026.

C. Phase III Analysis of Building Condition Survey Data

Core Deliverable

A custom spreadsheet format that captures key data across all property elements and buildings.

CSDA wishes to devise an Excel file format that will facilitate review, analysis and presentation of the key data collected in support of preparing the Building Condition Surveys. At high level, the format must allow for categorization by specific property element, facility and cost with the ability to sort, select and leverage data for graphs and pivot tables. The AE will be expected to propose a format that meets key expectations and be able to describe how a user would be able to manipulate the data for various purposes. This includes providing demonstrations, written instructions and support to key CSDA personnel once the file(s) are created. The AE is expected to leverage their prior experience while working with CSDA personnel to identify new, value added features for this tool.

D. Phase IV Building Condition Survey Report

Core Deliverable

A narrative report that provides additional information and analysis of the data collected.

Using the data collected during the on-site facility condition assessment and analysis phase, the AE shall

provide a separate comprehensive condition assessment report for each facility. CSDA envisions that the master spreadsheet(s) created under Section C, will provide the information noted below. The report is expected to provide additional, value added narrative supplementing the spreadsheet(s).

The reports shall contain the following minimum information:

- 1)...Capital requirement costs summarized by building systems
- 2)...Capital requirement costs summarized by priority across facilities.
- 3)...Capital Requirement costs summarized by category type across facilities.
- 4)...Calculation of the Facility Condition Index (FCI) for each facility.
- 5)...Multi-year annual expenditure forecast for each facility.
- 6)...Detailed description of building assets and equipment detailing the observed condition and deficiency cause providing recommendations to correct the deficiency.
- 7)...List of the information provided and collected such as equipment type, manufacturer, model number, serial number, etc.
- 8)...Digital photographs for each piece of equipment assessed. Interior photographs will be used to document critical or unusual conditions. Photographs will be used to explain and or justify and prioritization of corrective actions.
- 9)...A schedule of annual forecast expenditures itemizing each deficiency against each asset classification of the total cost for the actions required to correct the deficiencies for each facility by building system.
- 10)

E. Phase V Preparation and Presentation of Strategic Plan

Core Deliverables

- 1) **A comprehensive communications plan covering all aspects of the Project.**
- 2) **Development and use of an algorithm to rank order each scope item identified and recommended for inclusion in the 5YR Plan**
- 3) **Development of a 5YR plan from multiple sources, rank ordered in terms of priority and in line with CSDA's target investment.**
- 4) **Documentation that will be used to convey, explain and present the final proposed 5YR Plan to interested parties and prepare for the Referendum vote**

Communications Plan

CSDA appreciates the wide range of interested parties, the topics of interest and the challenges in seeking alignment on the process and priorities for developing a 5YR facilities plan for a public school district. Among these, to provide regular updates and opportunities for input to students, families, staff and the public at large to inform development of the plan, as well as seek input at various milestones while performing the work at hand.

The communications plan will have two parts: development and implementation. The AE is responsible for both parts.

The AE will be required to conceive, present, secure approval for and execute a comprehensive plan covering all aspects of the Project. In the development of this plan, the AE will work collaboratively with CSDA representatives at various levels to define, document and socialize key criteria for the plan. Once a working draft is created, the AE will present it to District leadership for review and comment.

Throughout the process, the AE will record comments, questions and other input as means to document plan revisions.

Key goals include:

- 1) Be considerate of timing, prioritizing work on this deliverable from the beginning to ensure that development and execution support Project status
- 2) Work collaboratively and efficiently with CSDA to define objectives and strategies
- 3) Enlist means to help ensure the plan is inclusive of input from all members of our diverse school community
- 4) Leverage lessons learned from prior projects, both positive and for continuous improvement
- 5) Be prepared to receive, respond to, defend and take appropriate action on all input

Development of the plan will entail an iterative process. The AE must plan accordingly and be prepared to seek input from and present the plan to various groups, multiple times if necessary. Examples of affinity groups CSDA would expect the AE to engage include but are not limited to:

- CSDA Board of Education
- CSDA Leadership
- CSDA School Safety Committee
- Parent-Teacher Association Members
- Building Leadership Teams
- Students, Families and Community Members

CSDA expects that the AE will use a variety of communication and community outreach tactics to gather input to inform development of the plan from all members of our school community. These tactics should include, but not be limited to:

- District-wide survey open to all
- A minimum of 3 focus groups for faculty, staff and administrators (at least one at each level: elementary, middle and high school)
- A minimum of 5-7 focus groups for parents and guardians (providing opportunities at elementary, middle and high school)
- A minimum of 2 town hall-style meetings open to all

Once the plan, or portion of the plan covering a particular portion of the Project, is approved, focus will shift to implementation; executing the various tasks documented in the plan, monitoring feedback and making adjustments as may be required or directed by members of the Board of Education and CSDA leadership. In this capacity, the AE will be responsible for facilitating and leading all public meetings to provide regular updates to the community and to collect input at various, predetermined milestones. The AE will determine the number and type of public meetings desired through these stages of the Project in partnership with the Board and CSDA leadership.

By definition, execution of the communications plan will be required over the course of the Project. The AE must plan for meetings occurring after normal business hours with select groups who are not otherwise available during the day. At a minimum, this would include bimonthly Facilities Committee meetings and quarterly Board of Education meetings.

Once a proposed 5YR Plan is developed and approved by the Board, the AE will have lead responsibility, in partnership with CSDA, for presenting it to various groups, recording questions and input and answering questions. This would include Board meetings as well as school-based and community meetings. This portion of the communications plan will include the preparation of written materials and visual aids explaining the final proposed 5YR Plan to be submitted for a public vote anticipated in May 2026. These materials to be prepared by the AE would include renderings and other visual aids of certain aspects of the plan, where appropriate, and a detailed description by building of the work proposed for the 5YR Plan.

All materials developed for the Project, and information to be shared with members of the school community to gather input and to provide updates, will be provided to CSDA leadership and the CSDA Communications Department for review prior to dissemination, and, following approval, for the CSDA Communications team to distribute through its standard digital notification and social media platforms.

Should the AE decide to sub-contract any portion of this deliverable to another firm, that must be confirmed in the AE's submission along with detailed credentials for the proposed firm, what portion(s) are proposed to be sub-contracted, and the proposed firm's relevant experience with this type of task. Even if it is agreed that portions of this deliverable will be delegated, AE representatives will be expected to participate in various meetings to address topics the consultant

could not.

Means for Prioritizing & Ranking Scope Items

The number of scope items recommended for inclusion in the 5YR Plan is expected to exceed available resources to complete in this cycle. Given the size of CSDA, and the range of challenges and opportunities that exist, it is critical that a fair, logical and transparent process be devised to rank order all scope items across all CSDA buildings. The required deliverable is a master, prioritized listing (spreadsheet), ordered from highest priority to lowest priority in the manner indicated by application of the custom rank order process ('algorithm') to be devised by the AE.

To create this custom tool to rank order all scope items recommended for inclusion in the 5YR Plan, the AE will be expected to present all criteria, considerations and other factors that will be used, along with the logic for how those will be computed into a ranking for each item. The following considerations must be included, but will not be limited to:

- 1) Scope items that fell below the approval line from the previous cycle. These items must be reconsidered and revalidated and given some level of priority since they were not included in the previous cycle.
- 2) Any scope items required by government regulation
- 3) Any scope items relating to the safety and welfare of students, staff or the public
- 4) Any scope items relating to the general security of CSDA facilities
- 5) Any scope items required to maintain the comfort and function of the learning environment; classrooms and other student spaces
- 6) Any scope items relating to the general preservation of CSDA facilities
- 7) Any scope items relating to the aesthetics and general appearance of CSDA facilities

Since this rank order tool will decide the relative importance of scope item A at Facility 1, scope item B at Facility 2, scope item C at Facility 3 and so on, the AE will be expected to present the recommended criteria and weighting system to CSDA leadership for review and comment. This includes the CSDA Board of Education. The AE should plan on three iterations to reach final consensus. Once finalized and approved, the AE will be expected to present, explain and defend the tool to other interested parties. The ultimate goal is to provide a tool to make fair and equitable decisions for ranking scope items based on the merits of each one.

Development of the 5YR Plan

The 5YR Plan will be comprised of input from three (3) sources:

- 1) The recommendations derived from the Building Condition Surveys
- 2) The recommendations from an independent District wide facility assessment
- 3) Input from CSDA relating to known challenges and needs

The AE is responsible for considering all input from the sources listed and combining all applicable scope items in one master list. The resultant list of scope items will then be rank ordered using the

custom tool discussed above.

Key Notes:

Regarding Item 2 above, CSDA will engage an independent professional service partner to perform an assessment of all facilities. This effort is not intended to nor will it be designed to duplicate efforts associated with creating the Building Condition Surveys. However, there may be information needed by that partner to complete their work. The AE will be expected to openly provide any information requested over the course of the Project. All requests will be made via the Director of Facilities Planning or the Assistant Superintendent of Business & Finance and will be limited in scope to work product produced as part of this Project.

Regarding Item 3 above, CSDA has compiled a listing of known challenges and needs by building. This listing should not be considered a complete and final record of CSDA needs, rather it is offered to provide the AE with insight into issues already identified as problematic. The AE will be responsible for further investigating, inspecting and integrating these items into normal work activities associated with this Project. A preliminary version of this listing is included with this RFP as **ATTACHMENT F**. CSDA will be updating the listing and issuing it as an addendum prior to the submittal date.

In addition to the items listed in Attachment F, the following are topics of general interest across facilities that CSDA wishes to include for consideration in the Project:

- Public Address System Enhancements
- Secured Entrance Vestibules
- Indoor Air Quality
- Lead Pipe and Fixture Abatement
- Emergency Backup Power for Data / Network Gear

Once the scope items are rank ordered, the AE will prepare cost estimates for each item. General requirements include but are not limited to:

- a) The AE must utilize resources skilled in preparing cost estimates. Professional estimating services are recommended if adequate in house resources are not available.
- b) All estimates shall be prepared with the goal of +/-20% to actual
- c) All estimates shall include a cost escalation factor to 2028 dollars (to be agreed in advance)
- d) All estimates shall include design and construction contingency factors (to be agreed in advance)
- e) All estimates shall include written assumptions upon which they are based

CSDA will provide a target investment value to fund the work in the 5YR Plan. CSDA will work collaboratively with the AE to refine that value in relation to the scope items captured. This value will determine how many of the rank ordered scope items can be included in the final draft. Items that are not selected for inclusion in the final draft will be annotated as such and will be considered first for other project opportunities or the next plan cycle.

Contract Term

The contract term will be effective upon the date of contract execution (Target March 2025) and be completed no later than June 30th, 2026 or until final acceptance of the work by the Director of Facilities Planning.

Key Scheduling Requirements

CSDA leadership requires the AE to complete and file all Building Condition Surveys with NYSED no later than December 31st, 2025 or, if necessary and agreed to in advance, March 1st, 2026.

CSDA leadership requires the AE to complete a 5YR Plan no later than April 1st, 2026 to prepare for public vote in May 2026.

Key Meeting Requirements

In addition to the meeting requirements discussed throughout this document, the AE will be expected to participate in regular update meetings as follows:

Bimonthly progress updates to the CSDA Facilities Committee. These meetings are typically held the second Tuesday of the month and begin at 5:45pm.

Quarterly progress updates to the CSDA Board of Education. These meetings are typically held on the third Thursday of the month and begin at 6:30pm.

Work Product Development, Tracking & Ownership

This Project will generate a significant amount of information (work product). The AE will collaborate with CSDA to define, list and configure the various work products that will be created in the performance of this project. CSDA wishes to review and agree on formats and general content structures for each deliverable that serve two purposes in each document; capture the information that document is designed for as well as serve as a tracking tool for progress, limiting the need for traditional meeting minutes. AE will be expected to use MS Excel for capturing data and information, while utilizing MS Word for reports and similar type documents.

Key goals are as follows:

- Devise purpose specific, master documents by topic and purpose that will provide value to

CSDA beyond completion of this Project

- Capture all information in the applicable master document to the extent possible limiting the need to cross-reference between documents
- Devise a file and folder naming structure that facilitates quick identification
- Discuss and agree on all document related issues that will serve the needs of BOTH the AE and CSDA.
- Capture agreed formats, naming conventions and other decisions in a master listing.

All work product developed as part of this Project will become the property of the City School District of Albany. This includes but is not limited to field notes, memoranda, emails, meeting minutes, plans, schedules, estimates, reports, graphs, lists, spreadsheets, assessments and ANY other type of work product developed, both in paper and electronic formats. CSDA will leverage this information to review progress against deliverables, review status against schedule and for whatever other means it deems appropriate and necessary. CSDA and AE will discuss and devise a strategy to mutually accomplish a periodic transfer of all work product developed at regular intervals. All documents must be made available in native file formats with full access rights and not be locked or otherwise constrained for use.

ATTACHMENT B – SIGNATURE PAGE

City School District of Albany
Request for Proposal – RFP 0307-25 District-wide building condition survey

I have reviewed and agree to the terms, conditions and other stipulations of this RFP dated January 28, 2025 and further certify the accuracy of the information submitted as the proposal:

Authorized signature: _____

Individual's name (print): _____

Title (affix seal if a corporation): _____

Business name: _____

Mailing address: _____

Business license number: _____

Date: ____ / ____ / ____

Phone: _____

Fax: _____

e-mail: _____

Proposals must be signed to be valid.

ATTACHMENT C – FEE STRUCTURE AND DISCLOSURE

Request for Proposal RFP-Building Condition Survey Services

Name of Firm: _____

Respondents shall establish their total proposal price as a combination of their lump sum fee for the defined Scope of Work and the two (2) categories of forecasted reimbursable costs. It is understood that these reimbursable budgets are forecasts and that the actual scope will vary. Budgets shall be reconciled per the approved Reimbursable Fee Tables.

Lump Sum Fee

1. **Scope of Work** (Phase I thru V).....\$_____

Reimbursable Services & Expenses

2. **Expenses** (Forecasted Budget).....\$_____

Sub-Consultants

3. **Expenses** (Forecasted Budget).....\$_____

Respondents shall provide the fee for each phase, I through V.

Respondents shall provide an itemized listing of expected reimbursable expenses for items 2 & 3 above, including the applicable fee table. Include any key assumptions used to create the listings as well as a hourly rate table for all professional service personnel.

Total Cost Summary of Items 1, 2 & 3 above is \$_____. This is the cost figure that your proposal will be based upon. Your total compensation, including reimbursements for the scope of services to be delivered under this contract will not exceed this dollar amount without prior approval from the District.

Quote submitted by:

(signature) **ATTACHMENT**

D – INSURANCE REQUIREMENTS

The Consultant agrees to procure and maintain, at no additional expense to the District, insurance coverage as outlined below. The Certificate of Insurance to be included in the submission must state “the City School District of Albany, its officers, employees, and assigns are additional insured. Coverage is on a primary and non-contributory basis”, and may not include limiting language. The liability insurance(s) shall further provide that it may not be changed or canceled without thirty (30) days prior written notice to the District.

A. Worker’s Compensation – Requires proof of coverage

1. State: New York
2. Applicable Federal
3. Employer’s Liability: \$1,000,000

B. Comprehensive General Liability (including Premises-Operation, Contractor’s Projection, Products and Complete Operation, Broad Form Property Damage) – Requires COI with endorsement:

1. Bodily Injury:
 - \$1,000,000 – Each Occurrence
 - \$2,000,000 – Annual Aggregate, Products and Completed Operations
2. Property Damage:
 - \$1,000,000 – Each Occurrence
 - \$2,000,000 – Annual Aggregate
4. Personal Injury: \$2,000,000 – Annual Aggregate

C. Professional Liability - Requires COI with endorsement:

1. \$2,000,000 Each Claim
2. \$4,000,000 Annual Aggregate

NOTE: The district may request additional insurance coverage based on the nature of the services to be provided which may include Cyber Liability, etc.

ATTACHMENT E – PROPOSAL (SUBMITTAL) REQUIREMENTS

Proposal (Submittal) Requirements

References/Experience: Three client references for similar districts in size and scope successfully completed by the proposing firm within the last five years. Briefly describe each project and for each reference provide up-to-date individual contact name with email and phone number.

Describe qualifications and experience to perform the work described in the Scope of Work. Experience should include direct experience with the subject matter.

Qualifications/Experience of Key Personnel: Provide a team organization chart with specific positions and names for each staff member that will be assigned to the project. Provide related Qualifications and experience of key personnel who will be assigned to this project. This includes personnel to perform the significant leadership, management and technical functions required. Similarly provide a complete listing with names and qualifications of any consultants you intend to use. The team organization chart must include a contingency plan if any of the key personnel are unable to perform their duties, whether temporarily or for an extended period of time. (

Quality Assurance & Control: Provide a copy of the firm's written QA/QC plan with a concise summary of the process controls that will help ensure all deliverables are produced at the highest quality. Further, how those process controls are applied in the course of work and who will have overall responsibility for ensuring successful implementation.

Plan Approach and Timeline: Provide A descriptive narrative of your understanding and proposed approach to successfully perform the project, including a specific description or list of any exceptional, value-added features or capabilities beneficial to the district the proposal brings to the project. Provide a proposed work plan and block schedule which includes a detailed outline of the time commitment for each phase of the scope of work broken down by tasks, milestones, and duration. Provide sample reports and deliverables of previous similar projects.

Evaluation

The District will evaluate each proposal submitted and may accept any proposal deemed to be in the best overall interests of the District. The District reserves the right to reject any or all proposals, or any portions thereof and to waive any informality or technicality in any proposal received. Primary considerations for evaluation are outlined as follows:

- 1) Prior experience directly relatable to this Project with positive references
- 2) The experience and expertise of the specific team members that will be assigned to this Project
- 3) The experience and expertise of any consultants or subcontractors who are proposed to work on this Project
- 4) The care, creativity and thoughtfulness demonstrated in all responses to this RFP and during any discussions after receipt of proposals.
- 5) Demonstrated attention to detail and willingness to work collaboratively with CSDA to find mutually agreeable positions on all topics.
- 6) A written quality control plan that demonstrates a process that will help ensure the accuracy and

completeness of all required deliverables.

- 7) A realistic block schedule that includes high level work breakdown structure to perform all work and create all core deliverables with associated durations and milestone dates.
- 8) A risk assessment identifying key risks foreseen in the performance of this Project along with potential mitigation strategies.
- 9) Evidence and assurances the AE has the resources and bandwidth to perform this Project given any other prior commitments or constraints.
- 10) The desire to form a collaborative partnership based on mutual respect, continuous improvement and the pursuit of excellence.
- 11) Any other criteria CSDA deems appropriate.