



June 9, 2016

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Wellesley Public Schools
Request for Proposal
Comprehensive Population & Enrollment Study and
Forecast

As submitted to:
Judith M. Belliveau
Assistant Superintendent for Finance and Operations
Wellesley Public Schools

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June 7, 2016

Judith M. Belliveau
Assistant Superintendent for Finance and Operations
Wellesley Public Schools
40 Kingsbury Street
Wellesley, MA 02481

Dear Ms. Belliveau,

MGT of America Consulting, LLC. (MGT) is pleased to present our qualifications and approach to Wellesley Public Schools (WPS) for a *Comprehensive Population and Enrollment Study and Forecast*. We understand the importance of this project in preparing enrollment projections, capacity and utilization analysis of the nine district schools and making pragmatic recommendations to address the program and space requirements of the Wellesley Public Schools.

MGT has been providing educational consulting services to PK-12 institutions for the past 40 years and is nationally recognized as a leading educational consulting firm. MGT has successfully managed more than 7,000 client engagements in every state and several foreign countries. Our staff of over 60 qualified professionals brings a wealth of knowledge and depth of understanding to all our client engagements, delivering the quality services our clients expect and deserve. Our organizational mission is supported by our capacity to deliver an extensive range of services to a variety of public sector institutions, nonprofit groups, and private businesses.

We have assembled qualified professionals for this study including an educational program specialist, an enrollment and demographics analyst and an architect with educational facility experience.

Our goal for this project is to provide WPS with the best data and analysis to support an enrollment study that must take into account economic trends, local demographics, in and out migration both from the town and between the public schools and private schools, local housing stock, housing turnover, housing development and permits along with district and school enrollment and utilization and boundary study for the district. Our success in providing accurate enrollment projections for school districts is built on utilizing "best practice" methods and employing the critical thinking of our experienced professionals. We are committed to providing WPS with the highest quality study for the greatest value.

We appreciate the opportunity to submit this proposal to Wellesley Public Schools, and we look forward to working with the district and the community to conduct this important effort. If you have any questions or need further information, please do not hesitate to contact our project director, Joe Clark (jclark@mgtamer.com or 360-269-5500).

Respectfully,

A handwritten signature in blue ink that reads "Steve M. Manders". The signature is written in a cursive, flowing style.

Steve Manders
Vice President Finance
MGT of America Consulting, LLC.

WELLESLEY PUBLIC SCHOOLS

RFP | COMPREHENSIVE POPULATION AND ENROLLMENT STUDY AND FORECAST

JUNE 9, 2016

SUBMITTED BY MGT OF AMERICA CONSULTING, LLC

JOE CLARK

VICE PRESIDENT OF INFORMATION TECHNOLOGY

JCLARK@MGTAMER.COM

(360) 269-5500



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QUALIFICATIONS

QUALIFICATIONS OF FIRM

MGT of America, Inc. was incorporated in August 1974 in Florida. Based on recent restructuring, the firm is now MGT of America Consulting, LLC. The restructuring is internal and in name only, not in personnel or services provided by the firm. We have been in business consecutively for the last 41 years and have had a successful educational facilities practice for the last 29 years. MGT is a financially-sound, Limited Liability Company, and is capable of providing the resources required to successfully provide services for Wellesley Public Schools.

MGT has grown from our original corporate headquarters in Tallahassee to include regional offices in the metropolitan areas of Sacramento, California; Austin, Texas; Olympia, Washington; and Bay City, Michigan. Our corporate address is 3800 Esplanade Way, Suite 210, Tallahassee, FL 32311.

For four decades MGT has specialized in helping public education clients achieve success in planning for their long-range facility needs. As a result of our extensive experience, we have a deep understanding of school district environments and the trends that impact educational space needs and facilities planning. MGT's clients appreciate and benefit from high-quality quantitative and qualitative analysis, detailed findings, and objective recommendations that are practical and implementable.

Our PK-12 facilities practice was started in 1988 and has helped school districts across the country develop or refine standards for educational facilities, assess the impact of current and future educational programs, determine future enrollments and demographics, analyze the capacity and utilization of school buildings, and generate short- and long-range facility scenarios that are educationally sound and community-based.

Below are some of our other markets and services that we provide.

FACILITY ASSESSMENTS AND ANALYSIS	DEMOGRAPHIC STUDIES
FACILITIES PRIORITIZATION AND PLANNING	STRATEGIC PLANNING
CAPACITY AND UTILIZATION ANALYSIS	FUNDING STUDIES AND MODELS
ENROLLMENT PROJECTIONS	EDUCATIONAL TECHNOLOGY CONSULTING
COMMUNITY COLLABORATION	EDUCATIONAL SPECIFICATIONS
FACILITY MASTER PLANNING	FACILITY STANDARDS

KEY PERSONNEL

This study will be conducted by two of MGT’s experienced leads, Mr. Joe Clark and Mr. Dodds Cromwell, and they will be supported by our senior analyst. All resumes are shown below.



JOE CLARK

VICE PRESIDENT, IT DIVISION
MGT OF AMERICA CONSULTING, LLC.
JCLARK@MGTTAMER.COM

Mr. Clark has over 22 years of experience working in the public sector, including serving as the Chief Information Officer for the Washington Office of Superintendent of Public Instruction. Working with the K-20 environment, his areas of expertise include policy and legislative analysis; project management, geographical information systems (GIS) analysis; and database design, management, and analysis. He has a depth of experience, particularly within the context of K-12 education, relating to technology, large scale data collection systems, application development, network design, and implementation. His other proficiencies include large scale data collection systems and information technology planning, as well as expertise with a broad range of software, including MS SQL, Internet Information Server, Arcview GIS, SharePoint and Microsoft Office. Mr. Clark also possesses experience in Web design, including the use of HTML, dynamic HTML, XML, and Java programming languages. Mr. Clark has been a Chehalis School Board Director for 17 years.

EDUCATION

E B.A., BUSINESS ADMINISTRATION, PORTLAND STATE UNIVERSITY, 1984
A.S., COMPUTER SCIENCE, HIGHLINE COLLEGE, 1992
A.S., MICRO INFORMATION SYSTEMS, HIGHLINE COLLEGE, 1992

PROJECT WORK

Mr. Clark has worked with the following clients on projects of similar scope within the last seven years:

- | | |
|---|---|
| Springfield R-12 Public Schools, MO | Kentucky Department of Education |
| Andover Public Schools, MA | White River Valley School Corporation, IN |
| Savannah-Chatham County Public School System, GA, | Colorado Department of Education, CO |
| Boston Public Schools, MD | Pennsylvania Department of Education, Pa |
| Kansas City Public Schools, KS | Santa Clara Regional Education Office, CA |
| Kentucky Department of Education, KY | Education Service Districts, WA |
| United States Department of Education, USA | Fairfield Public Schools, CT |
| Dunlap Community School Unit District, IL | Smyth County Public Schools, VA |
| DeKalb County Schools, GA | Lyon County School District, NV |



DODDS CROMWELL, AIA

VICE PRESIDENT,
FACILITIES DIVISION
MGT OF AMERICA CONSULTING, LLC.
DODDS@MGTAMER.COM

Mr. Dodds Cromwell is Vice President of Facilities at MGT and specializes in facility assessment and planning. Since 1995, Mr. Cromwell has served as the firm’s principal architect and planner on a wide range of projects. His project experience with MGT has included work with public school districts, colleges and universities, state and local governments, and non-profit entities.

Mr. Cromwell is a licensed architect in Washington state and also holds a masters degree in counseling and one in elementary education. Prior to joining MGT, Mr. Cromwell owned and operated a full-service architectural practice in Seattle, WA. He has also worked and held licenses in California and Alaska and specialized in educational facility assessments. He is a member in good standing with the American Institute of Architects.

EDUCATION

M.S. IN COUNSELING, CALIFORNIA STATE UNIVERSITY, SACRAMENTO, 1979
M.ED. IN ELEMENTARY EDUCATION, SOUTHERN UNIVERSITY, BATON ROUGE, LOUISIANA, 1974
A.B. IN ARCHITECTURE, UNIVERSITY OF CALIFORNIA, BERKELEY, 1971

PROJECT WORK

Mr. Cromwell has worked with the following clients on projects of similar scope within the last seven years:

- | | |
|--|---|
| Springfield R-12 Public Schools, MO | Sweetwater Union High School District, CA |
| McAllen Independent School District, TX | Atlanta Public Schools, GA |
| Andover Public Schools, MA | Carroll County Public Schools, MD |
| Savannah-Chatham County Public School System, GA | Wichita Falls Independent School District, TX |
| Boston Public Schools, MD | Spring Independent School District, TX |
| Rapid City Area Schools, SD | Eugene School District 4J, OR |
| Lyon County School District, NV | Kentucky Department of Education, KY |
| DeKalb County Schools, GA | Public Schools of Brookline, MA |
| Anne Arundel County Public Schools, MD | Fairfield Public Schools, CT |
| Kansas City Public Schools, MO | Colorado Department of Education, CO |



LYNDA FENDER

SENIOR ANALYST
MGT OF AMERICA CONSULTING, LLC.
LFENDER@MGTAMER.COM

Ms. Fender is a senior analyst in MGT’s educational facilities practice. Since joining the firm in 2000, Ms. Fender has served on master planning and facility assessment projects for both PK-12 and higher education institutions. Her extensive facilities experience includes analysis of demographics, educational suitability, utilization, financial feasibility, program needs, site determination, and cost estimation as well as using GIS to analyze boundary redistricting and other demographic analyses. Her analysis has been instrumental in calculating PK12 district enrollment projections. Over the last decade, our district-level enrollment projections are within 2.9 percent of actual enrollments. Her work has assisted numerous clients in capital budget development, facility needs prioritization, and customization of space standards and planning guidelines. Ms. Fender possesses strong quantitative skills and broad research experience.

EDUCATION

B.S., WILDLIFE MANAGEMENT, HUMBOLDT STATE UNIVERSITY, 1998

PROJECT WORK

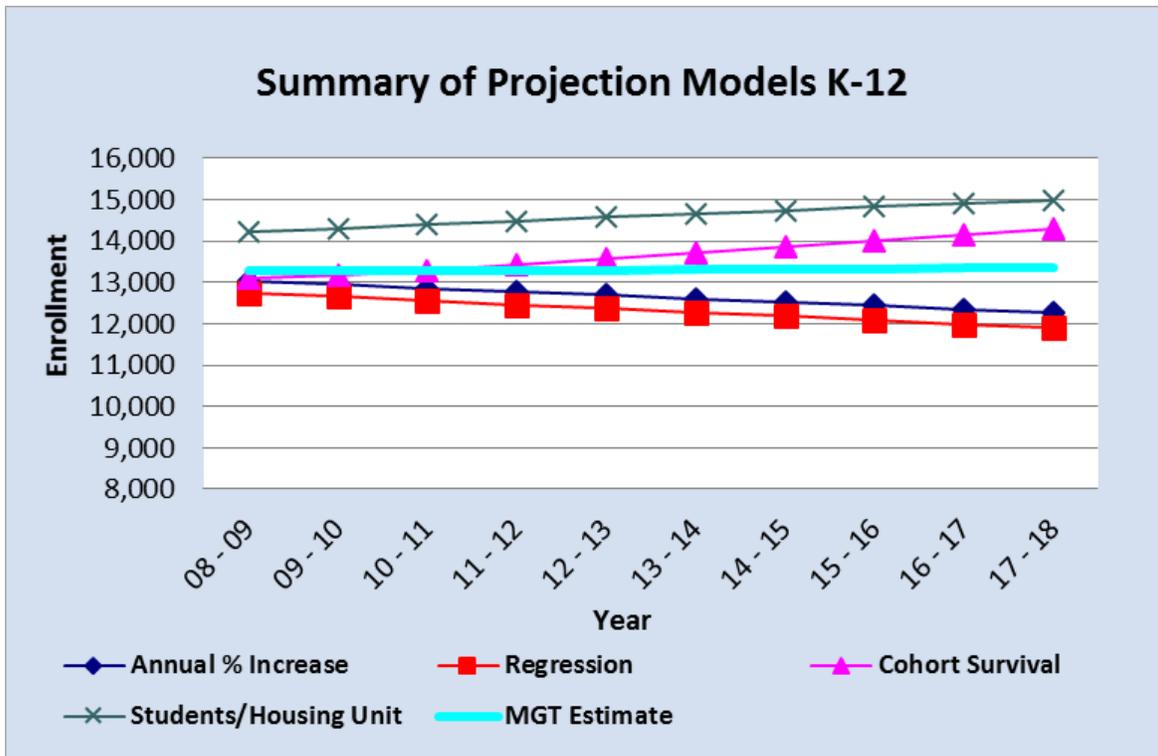
Ms. Fender has worked with the following clients on projects of similar scope within the last ten years:

- | | |
|--|---|
| Springfield R-12 Public Schools, MO | Atlanta Public Schools, GA |
| McAllen Independent School District, TX | Carroll County Public Schools, MD |
| Andover Public Schools, MA | Wichita Falls Independent School District, TX |
| Savannah-Chatham County Public School System, GA | Spring Independent School District, TX |
| Boston Public Schools, MD | Eugene School District 4J, OR |
| Rapid City Area Schools, SD | Kentucky Department of Education, KY |
| Lyon County School District, NV | Public Schools of Brookline, MA |
| DeKalb County Schools, GA | Fairfield Public Schools, CT |
| Anne Arundel County Public Schools, MD | Colorado Department of Education, CO |
| Kansas City Public Schools, MO | Fulton County Schools, GA |
| Kenton County Public Schools, KY | Douglas County School District, NV |
| Houston Independent School District, TX | Richland County School District 1, SC |
| Fremont Unified School District, CA | St. Louis Public Schools, MO |
| Kentucky Department of Education, KY | Fresno Unified School District, CA |
| Sweetwater Union High School District, CA | |

APPROACH AND METHODOLOGY

ENROLLMENT PROJECTION METHODOLOGY

MGT's enrollment projection process is designed to estimate student enrollment by grade level and by school or feeder pattern for either five, ten, or fifteen years into the future. The process typically incorporates four different models: *cohort survival*, *students per household*, *annual percentage change*, and *linear regression analysis*. MGT can weight each model, as deemed appropriate to the district circumstances, and incorporate other anticipated influences on enrollment, such as a new housing development, the opening or closing of a large business, and major in- or out-migration trends.



Enrollment projections are merely an *estimate* of future activity based on the historical data and information provided. As demonstrated by the district calculations over the past ten years, there can be constant variations in growth. These numbers can be highly accurate, but it must be remembered that the numbers are still a projection or estimate. Throughout the implementation of any series of recommendations, it is critical that the district reassess the projection numbers on a regular basis and adjust plans accordingly.

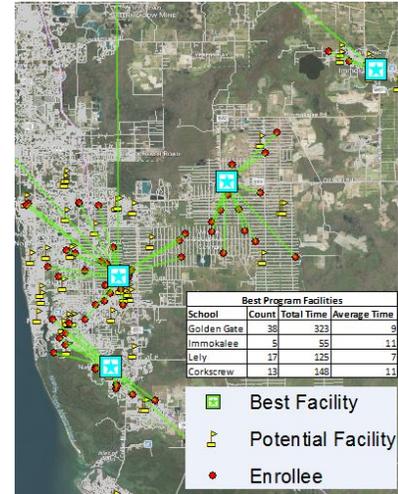
To identify trends and prepare for adequate spaces, teaching staff, materials and supplies, educational leaders can use several methods for projecting enrollment. But most important is to examine the nuances of each model in relationship to the capacity and utilization of the program spaces being used to be able to project as accurately as possible the correct numbers of classrooms, teachers and staff to support the program. Because no one model is foolproof, MGT generates a weighted average of these four "base" models to arrive at its enrollment projection.

A rule of thumb when forecasting enrollment is that the models should use as many years of historical data as there are years in the projection period. In other words, if the model is projecting enrollment for five years from now, then five years of historical data should be used. If the model is projecting enrollment for ten years from now, then ten years of historical data should be used.

INTELLIGENT GIS ANALYSIS

MGT understands the power and benefit of geographic modeling to assist in decision-making. Placing students based on residence and moving students to address crowding, travel time, demographic differences, etc. is much easier to model and understand when global information systems (GIS) technologies are in place. We understand that school boundaries must take into consideration a host of social and economic factors, including:

- ◆ Enrollment (current and projected)
- ◆ Travel times (including pedestrian accessibility)
- ◆ Diversity (minority enrollment)
- ◆ Income disparities (percentage students receiving free and reduced-price meals)
- ◆ Neighborhood cohesiveness
- ◆ School feeder patterns
- ◆ Access to specialty programs (pre-K, Special Education)
- ◆ School district properties (existing schools, vacant lands)
- ◆ Planned residential growth patterns and developer entitlement commitments



Each of these factors has a spatial component and can be analyzed geographically. Our team has used GIS technologies (most notably, ESRI’s ArcGIS Desktop 9.x/10.x software) to analyze these types of factors for public- and private service districts in the past. A sample for Collier County, FL, is shown on the page above.

EDUCATIONAL CAPACITY ANALYSIS

Traditionally, the capacity of school facilities has been measured in two ways, the design capacity and the functional capacity. The design capacity is typically used by architects and building officials to determine the maximum number of occupants for a building, often based on square feet per student. The functional capacity measures the number of students a school can accommodate, given the particular educational programs being offered.

MGT often uses an “Instructional Use Model” to gather more information regarding the functional capacity. This model establishes the loading factor, or number of students, for each individual classroom depending on the educational program. Typical loading factors might be 18 for kindergarten, 25 for a general classroom, and 10 for a self-contained special education classroom. A total number of students is calculated for all the classroom types in the school. This total is then multiplied by a scheduling factor, which takes into consideration class schedules and grade grouping, to determine the functional capacity. MGT proposes to conduct a capacity and utilization analysis using our methodology or one preferred by the district.

MGT proposes to conduct a capacity and utilization analysis using our methodology or one preferred by the district.

ROOM TYPE	NUMBER OF CLASSROOMS X	STUDENTS/ CLASSROOM	= CAPACITY
Secondary Classroom (7-12)	47	25	1,175
Secondary Advanced Placement (7-12)	0	25	0
Science Lab Classes (Secondary)	9	25	225
Keyboarding/ Computer Lab (Secondary)	2	30	60
Art (Secondary)	3	24	72
Music (Secondary)	4	24	96
Trade, Industrial, Etc. (Secondary)	5	15	75
PE (Secondary)	5	35	175
Special Ed - Self Contained (High School)	2	10	20
Special Ed - Resource (High School)	0	0	0
Portable Room Count	5	0	0
Total Capacity (w/o scheduling factor) =			1,898
x High School scheduling factor of			75%
High School Capacity =			1,424

While the functional capacity is an effective measurement, MGT has found that it does not take into account the negative impact that schools designed by yesterday’s standards can have on today’s curricula and special programs. Consequently, we have developed an additional capacity measurement which is called the “Programmatic Use Model.” The programmatic capacity is not a substitute for the functional capacity, but is an additional tool that can be used to show the effect of *un-housed* programs on the day-to-day operation of a school facility, such as the lack of music and art rooms at the elementary level, or the lack of offices for support services at the secondary levels.

Used together, the functional capacity and the programmatic capacity provide a more insightful utilization analysis. This analysis will support and enhance facility planning that is based on the current educational goals and objectives of the district.

GENERAL WORK PLAN AND TIMETABLE

The following proposed work plan is based our current understanding of the district’s scope of work. As the reader will discover, one of our first tasks will be a review of the work plan to ensure it meets the needs of the district and is responsive to the district’s required schedule. Once the work plan is finalized, it will serve as a tool for MGT to manage the project and for the client to monitor the progress.

TASK 1.0: PROJECT INITIATION

The MGT team will conduct a project initiation meeting with the appropriate district staff to establish proper lines of communication and review the district’s goals for the study. The proposed work plan and schedule will be reviewed and finalized.

OBJECTIVES:

- ◆ To ensure effective communication throughout the project.
- ◆ To ensure the project’s final product will meet the client’s goals and objectives.

ACTIVITIES:

- I.1 Conduct project initiation meeting with appropriate district staff.
- I.2 Identify the appropriate lines of communication.

- I.3 Review proposed work plan and edit as appropriate to ensure the process and final product will meet the needs of the district.
- I.4 Complete data request forms provided by contractor
- I.5 Identify data sources for housing and planning information through local municipalities.
- I.6 Review proposed project schedule and establish final project schedule.

DELIVERABLES:

- ◆ Final work plan
- ◆ Final data collection process
- ◆ Final project schedule

TASK 2.0: ANALYSIS OF SCHOOL & COMMUNITY DEMOGRAPHICS & ENROLLMENT PROJECTIONS**OBJECTIVE:**

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

ACTIVITIES:

- 2.1 Meet with appropriate district and town staff to collect data on demographics and enrollment projections.
- 2.2 Review current enrollment projection methodology.
- 2.3 Develop sample enrollment projections using MGT methodologies to verify consistency of conclusions.
- 2.4 Adjust enrollment projection methodology as appropriate.
- 2.5 Submit draft enrollment projections for each school by grade, examining specific areas of focus such as ethnicity, social-economic status, neighborhood configurations, feeder patterns and housing developments for study period.
- 2.6 Review current school boundaries for possible adjustment due to enrollment patterns and school capacities.
- 2.7 Review census data and corresponding trends to the district enrollment projections.
- 2.8 Finalize enrollment projections.

DELIVERABLES:

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

TASK 3.0: ANALYSIS OF CAPACITY & UTILIZATION**OBJECTIVES:**

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

ACTIVITIES:

- 3.1 Meet with district staff and review any existing capacity formula(s).
- 3.2 Apply MGT capacity formula to address the following issues:
 - Student/teacher ratios
 - Special or “pull-out” programs which require space that does not contribute to capacity
 - Special classrooms such as art and music
 - Core facilities such as gyms and cafeterias

- Capacity and condition of modular classrooms
- 3.3 Apply formula to all schools and measure results against existing capacity ratings and staff experience.
- 3.4 Meet with principals to evaluate floor plans.
- 3.5 Walk each school and gather capacity and utilization data. Evaluate modular classrooms.
- 3.6 Calculate and document capacity of all schools.
- 3.7 Based on enrollment projections and calculated capacities, determine if there is sufficient capacity to meet current and future needs or if additional school space is required.

DELIVERABLES:

- ◆ Capacity formula(s) and ratings of all schools
- ◆ Enrollment vs. capacity charts, all included in final report.

TASK 4.0: PRESENTATION OF FINAL POPULATION & ENROLLMENT STUDY & FORECAST PLAN**OBJECTIVE:**

- ◆ To prepare and present a final study plan that exceeds the stated objectives of the district.

ACTIVITIES:

- 4.1 Prepare the draft utilization plan.
- 4.2 Present draft plan to district staff and revise as appropriate.
- 4.3 Revise draft and prepare final facility plan. The final plan shall address the needs of the district over the established projection period and include cost strategies to identify space needs.
- 4.4 Present final master plan to Board of Education.

DELIVERABLE:

- ◆ Final Ten Year Enrollment and Utilization Plan.

TIMELINE

The proposed project schedule for our work plan, based on district timelines and with a definitive end date of August 31, 2016, is shown below. During Project Initiation, firm dates for tasks and meetings will be discussed and decided upon, based on factors, such as district staff availability, testing windows, and other variables.

Included in this timeline are tentative dates for potential meetings, both virtual and in-person, as indicated by the key below the timeline. These proposed dates are flexible, based on client needs.

Tasks	June				July				August			
	6	13	20	27	4	11	18	25	1	8	15	29
1. Project Initiation		☛										
2. Analysis of School & Community Demographics & Enrollment Projections			■	■	△	■	■					
3. Planning meeting with district staff and municipalities to determine impacts to demographics and enrollment						☛						
4. Analysis of Capacity & Utilization						■						
5. Population and Enrollment Study and Forecast Report Presentation						■	△	■				
6. Final report and Board presentation										△	■	☛

☛ indicates potential meeting timeframe with district.

△ indicates virtual (SKYPE) meeting.

EXPECTATIONS OF WPS

MGT assumes all data will be available within seven days of a request. All data will be in a digital format such as MS Excel.

MGT will be on-site three times during the project.

1. During the project initiation to collect and validate enrollment data.
2. To meet with town staff to discuss housing, economic and demographic data and meet with principals and to walk schools and gather capacity and utilization data.
3. A final presentation of all materials to the Board of Education.

REFERENCES

Please provide at least three school district references

MGT's similar service history is described below. Each of the projects included services that WPS is looking for in their scope, and is of a similar size to WSP. In addition, we have conducted demographics and enrollment projections within two other Massachusetts school districts, Anne Arundel County Public Schools and Boston Public Schools, but focused on the following three as more salient to WSP's needs.

We encourage you to contact these clients to learn more about MGT's professionalism, ability to meet timelines, stay within budget, and exceed expectations.

FAIRFIELD PUBLIC SCHOOLS, FAIRFIELD, CONNECTICUT

Enrollment Projections and Elementary School Capacity Study & Enrollment Projection Updates & Demographic Projections

SEPTEMBER 2010 – DECEMBER 2010 & UPDATES 2011, 2012, 2013 & PROJECTIONS 2014
10,182 students | 17 schools

KAREN PARKS, ASSISTANT
SUPERINTENDENT
501 KINGS HIGHWAY EAST
FAIRFIELD, CT 06825
PHONE: (203) 255-8372

EMAIL: KPARKS@FAIRFIELDSCHOOLS.ORG

Scope of Work: MGT contracted with Fairfield Public Schools in September 2010 to assist the district with accurately projecting enrollment and analyzing the capacity and utilization for each elementary school in the district. MGT provided recommendations to help the district alleviate the imbalance in space use at the elementary level in the final report in December 2010.

MGT contracted with Fairfield Public Schools (FPS) in September 2010 to assist the district with accurately projecting enrollment and analyzing the capacity and utilization for each elementary school in the district. FPS contacted MGT in November 2011 to provide an update to the projections provided in 2010.

Specific services provided included: Enrollment projections, capacity and utilization, demographics

Project leaders included: Joe Clark, Dodds Cromwell, Lynda Fender

PUBLIC SCHOOLS OF BROOKLINE, BROOKLINE, MASSACHUSETTS
Facilities Master Plan & Enrollment Projections Update
 JUNE 2008 – JANUARY 2009 & DECEMBER 2011 – JANUARY 2012
 6,875 students | 10 schools

PETER ROWE, PROJECT DIRECTOR
 194 BOYLSTON ST
 BROOKLINE, MA 02445
 PHONE: (617) 730-2044
 E-MAIL: PROWE48@GMAIL.COM



Scope of Work: In June 2008, MGT contracted with the Public Schools of Brookline to develop a facilities master plan for the district. Brookline is a small, well-to-do suburb of Boston and the district adheres to a K-8 model for their primary schools. The school district was experiencing difficulty with finding ways to expand building capacity within the existing space and grade configurations and was looking to ensure that they had the proper educational spaces to accommodate the many special education programs offered. MGT assessed both the condition and suitability of the district's facilities and provided recommendations to address the capacity and utilization issues. MGT also engaged a very well-informed community as to what they would be willing to support.

2012 Update: MGT contracted with the Public Schools of Brookline in December 2011 to provide an update to the enrollment projections provided when MGT was under contract with the district to develop a facilities master plan.

Specific services provided included: Physical, educational adequacy, and tech readiness assessment, capacity and utilization analysis, demographics, community engagement, and enrollment projections.

Project leaders included: Ed Humble, Dodds Cromwell, Susan Zoller, Lynda Fender

RAPID CITY AREA SCHOOLS, RAPID CITY, SOUTH DAKOTA
Facilities Master Plan & Update
 OCTOBER 2007- APRIL 2008 & SEPTEMBER 2015 –
 MARCH 2016
 13,382 students | 28 schools

TIM MITCHELL, SUPERINTENDENT
 300 6TH STREET
 RAPID CITY, SD 57701
 PHONE: (605) 394-4031
 E-MAIL: RAPIDCITYSUPERINTENDENT@K12.SD.US



Scope of Work: The greatest challenge facing Rapid City Area Schools was to alleviate the crowding experienced at Central High School. The high school's enrollment count was one of the highest in South

Dakota and the space needed to offer educational programs was limited. The district also needed help in prioritizing schools in need of renovation and repair.

MGT developed a facility plan using data gathered on-site with our BASYS assessment tool as well as information learned from internal and external stakeholder interviews, focus groups, and community input meetings. MGT also projected enrollment for the next ten years and calculated the capacity and utilization at each building. **2015 Update:** MGT contracted again with RCAS in September 2015 to provide an update to the master plan that was developed nearly 10 years ago. This update included all four assessments of their facilities, updated enrollment projections, capacity and utilization analysis, and community engagement at four locations as well as an online survey.

Specific services provided included: Physical, educational adequacy, and tech readiness assessment, capacity and utilization analysis, community engagement, and enrollment projections.

Project leaders included: Ed Humble, Dodds Cromwell, Susan Zoller, Joe Clark, Lynda Fender

SAMPLE STUDY

Please include an actual report produced for another school district population/enrollment study, preferably of similar size and scope of work as the Wellesley Public Schools.

We would like to submit an excerpt of our final report to Rapid City Area Schools, South Dakota, for your review and comparison of our work. These excerpts include the demographics/enrollment and capacity/utilization chapters we completed for the client.

FEE

Please submit your fee proposal as a fixed amount for the Study plus anticipated expenses. Expenses will include all travel, administrative and other ancillary charges for the Study.

As the number of in-person meetings is to be determined, please provide your travel expenses as an amount per trip. Administrative and other ancillary charges should be submitted as a “not to exceed” amount. The award of this contract will be based on the fixed fee proposed for the Study, the “not to exceed” amount for administrative and other expenses, and the amount per trip.

Please also provide an hourly and/or daily rate for additional work that WPS may request.

MGT has reviewed the scope of work detailed in the RFP and the level of effort required to complete the work as detailed in the Study Requirements to develop a lump sum, not to exceed price proposal. The proposed lump sum fee, which includes all professional effort and expenses, is \$28,215.

MGT’s lump sum fee also includes a breakdown of expenses, described below.

MGT’s not to exceed admin/expenses amount is \$4,650. This not to exceed amount also includes three trips, with the amount per trip at \$1,550.

Below is the hourly rate per each consultant, in case WSP decides on additional work.

DESCRIPTION	HOURLY RATE
Dodds Cromwell, AIA	\$225
Joe Clark	\$225
Lynda Fender	\$105

CERTIFICATION

Please include a statement with your signature certifying that you can meet the completion deadline of August 31, 2016.

MGT is committed to meeting our client's deadlines. We take very seriously our commitment to these engagements and understand the reliance our clients place on us for expertise and timeliness. Our scheduling, communication, and management processes ensure the appropriate time and effort to complete the tasks of the project are met. With our track record of experience with this scope of work and a tested methodology, we certify we can meet the completion deadline of August 31, 2016.

Steve Manders, VP of Finance

Date