



SHERMAN BOARD OF EDUCATION

**The Sherman School
2 RT. 37 East
Sherman, CT 06784
(860) 355-3794 FAX (860) 355-9023**

**INVITATION TO PROPOSE
STRATEGIC PLANNING AND OTHER EDUCATIONAL SERVICES
THE SHERMAN SCHOOL**

The Sherman Board of Education is requesting proposals for strategic planning and other educational services for The Sherman School.

RFP Release Date: March 10, 2022
Question Deadline: March 15, 2022 at 10:00 AM
Question Responses: March 16, 2022 at 6:00 PM
Proposal Due: March 25, 2022 at 3:00 PM
Oral Interviews and Presentation: April 6th or 7th
Tentative Award Date: April 8, 2022

Issued by: Sherman Board of Education
Project Name: Sherman School Strategic Planning and Other Educational Services
Project Location: The Sherman School, 2 Rt. 37 E, Sherman, CT 06784
Contact Person: Dr. Jeff Melendez, Superintendent-Principal,
melendezj@shermanschool.com

I. General Background Information

The Sherman School is a single-school, public school district located in the northernmost corner of Fairfield County, Connecticut, with an enrollment of approximately 270 children in grades preschool through eight. The Board of Education, consisting of seven elected members, provides governance and fiscal oversight of a \$9.3M annual operating budget. Because the Sherman School District does not offer a high school program, the district pays tuition on behalf of each student to one of three local public high schools. Students may also choose to attend an area agriscience program, or a technical high school located in the county.

II. Scope of Work

The Board desires to determine the best plan for the future of our students and is seeking to hire a qualified consultant who can provide a comprehensive scope of services that are in many ways interconnected. Each service will be identified separately below, but the successful consultant will be able to appreciate how each of these separate scopes of work influence each other and will provide a proposal that considers all of the work to be completed so the Board can use this data to inform its next steps.

III. Scope of Services

A. Strategic Planning

The selected vendor will conduct a comprehensive process that will result in a 3-5 year Strategic Plan. Process must include obtaining feedback and input from all stakeholders including students, staff, faculty, administrators, parents, Board members and community members. The selected vendor will offer a variety of options for stakeholders to provide their input.

The selected vendor will be expected to work closely with the Board of Education and the administration to determine the best way to obtain feedback from all stakeholders. At the Board's discretion, the district's vision will also be evaluated to ensure it reflects the current values of the Board and community. If needed, the selected vendor will work with the Board and others to articulate a new or revised vision statement (and/or a mission statement).

The selected vendor will lead a Strategic Planning Committee and facilitate workshops to identify the components of the strategic plan and will develop a report that provides the Board with actionable recommendations as well as cost projections to successfully obtain these goals.

The selected vendor will provide graphics and print materials that convey the final Strategic Plan that is clear, concise and easy to utilize.

B. Evaluation of Administrative Model

The selected vendor will carefully evaluate our current administrative model which consists of four full-time certified administrators to determine what cost savings could be appreciated by making modifications to the present model. This evaluation will include a comprehensive cost-benefit analysis to determine what benefits attributed to the current model might be sacrificed if the model were changed and/or what benefits could be achieved if the model were changed.

The selected vendor must take into account the declining enrollment in our schools, and the recent modification of Board Policy 6111 that permits non-residents and non-resident faculty members' children to attend the school at a discounted rate. The analysis must take into account the workload that will be generated by the revised strategic plan, and what staffing at all levels would be necessary to achieve the stated goals in the time allocated.

The selected vendor will be expected to report to the Board alternative administrative models that might provide the Board with a more cost-effective approach to educating students in Sherman over a 5-10 year horizon. This should include models of administrative restructuring that consider fluctuations in staffing needs as student enrollment decreases and increases. A study conducted by Dr. Peter Prowda in February 2021 can be used to provide enrollment analysis. If the selected vendor wishes to conduct their own enrollment analysis, the fee for that service should be specified separately.

The selected vendor will also conduct a compensation analysis and present to the Board what are believed to be reasonable costs for obtaining qualified administrators to implement the new strategic plan.

C. Evaluation of Educational Model

Because The Sherman School is a very small school district, with a building that is in fair condition with very significant needs for upgrades including roofing, HVAC and mechanical systems; and because the district operates autonomously for all grades PS-8; and because the district pays tuition costs to area high schools for students in grades 9-12, the selected vendor will analyze the costs and benefits of the current educational model and propose alternatives that might be in the better interests of our students and taxpayers. If no better model from a financial and operational perspective exists, the selected vendor will provide a report explaining how the district's current educational model provides the most benefit.

IV. Interviews

Selected respondents are required to prepare a 1-hour presentation to the Board of Education at a public meeting on April 6 or 7 at some point between 4 PM - 9 PM. Respondents should be prepared to conduct their presentation in person if possible.

During this presentation, respondents must provide a brief overview of their services, describe their process for providing each of the deliverables, provide a reasonable timeline for completing the project, and allocate approximately 20 minutes for questions and answers. Failure to participate in the presentation will disqualify respondents from consideration.

V. Timeline/Important Dates

1. Question Deadline: All questions regarding the RFP and the project shall be submitted in writing by email to Dr. Jeff Melendez, Superintendent-Principal, melendezj@shermanschool.com no later than 10:00 AM on March 15, 2022. Questions submitted to any other person or by any other method shall not be addressed.
2. Responses to Questions: The Board's responses to questions will be posted on the Board's website by 6:00 pm on March 16, 2022.
3. Responses to the RFP: All responses to this RFP must be received at the Board's offices located at 2 Rt. 37 E, Sherman, CT 06784, ATT: Jeff Melendez no later than **3:00 p.m. on March 25, 2022 (the "Submission Deadline")**. The outside of the envelope shall be marked with the name and contact information for the responding firm. Neither emailed nor faxed submissions will be accepted. Any response that is not submitted by the Submission Deadline and in accordance with the submission requirements set forth in this RFP will be rejected and returned unopened to the respondent.
4. Interviews: The Board of Education will evaluate interested firms and may invite one or more firms to participate in an interview on April 6-7 at a time to be determined by the Board. Presentations by the firm should be no longer than 45 minutes inclusive of time for questions and answers.
5. Projected Contract Award Date: On or around April 8, 2022.

Contract award will be subject to the prior approval of the Sherman Board of Selectman and appropriation of required funding.

VI. Contract

The selected firm will be expected to enter into a contract with the Board. The Board reserves the right to further modify the Contract as determined by the Board to be in the Board's best interest.

VIII. Evaluation and Selection Process

Responses will be evaluated on both the qualifications of the consultant and the work proposed.

Qualifications Eligible consultants/firms will have the following minimum qualifications:

1. Experience leading Strategic Planning Committees that produce actionable recommendations that lead to achieving those committees' goals.
2. Experience analyzing enrollment projections and other demographic data and how they relate to physical space requirements and making recommendations based on those projections and requirements.
3. Understanding of best practices for curriculum and educational trends.

Format Required for Statement of Qualifications/Proposals In order to expedite review of the respondent's statements of qualifications and proposals, please provide the following information in the order listed below:

1. A Letter of Transmittal signed by a principal of the lead firm, not to exceed two pages, describing your firm or team and its qualifications, and why yours is the best firm for this project.
2. Statement of Qualifications to include, but not necessarily limited to, the following:
 - a. Name and address of your firm. Indicate who your contact person will be and provide a phone number, fax number and e-mail address.
 - b. A description of your proposal including how your firm intends to approach the assignment and an overview of the principals who will be working on the project and the tasks they will be responsible for.
 - c. A list and description of the projects that your firm has been involved with in the past five years that are similar to the scope and challenges of this project.
 - d. A timeline required to complete the project.
 - e. Three (3) references from similar projects.

3. Provide an estimated cost of services for the project as described in your Statement of Qualifications.

The Board will evaluate the responses to the RFP submitted by the Qualified Firms and determine the most responsible qualified firms, giving due consideration of the Qualified Firm's pricing for the services as well as Qualified Firm's (i) experience with work of similar size and scope as required for the Project, (ii) organizational and team structure for the Project, (iii) past performance data, including, but not limited to, adherence to project schedules and project budgets and the number of change orders for projects, (iv) the approach to the work required for the Project, and (v) Strategic Planning Committee oversight capabilities. The Contract will be awarded to the "most qualified firm" after consideration of all of the foregoing.

In its review of responses to this RFP and selection of the Contract awardee, the Board will be guided by the selection of the firm that would best serve the interest of the Board and the Town of Sherman. The Board reserves the right to negotiate with one or more of the "most qualified firms" and to accept modifications to the scope of services and fees proposed when such action would be in the best interest of the Board and the Town of Sherman, but only to the extent that such actions would not constitute a failure to comply with Section 10-287(b)(2) of the Connecticut General Statutes.

If determined to be warranted by the Board, the Board may conduct interviews of some or all of the Qualified Firms to assist the Board in the selection process. Included in the Board's request that a Qualified Firm participates in an interview, the Board will provide the name(s) of the representatives of the Board who will conduct the interview and the date by which the Qualified Firm must submit an affidavit disclosing its relationship(s) with the interviewer(s) or confirming that it has no relationship(s) with the interviewer(s). The names of interviewers will be released solely to enable the Qualified Firm to prepare the affidavit and neither the Qualified Firm nor its representatives shall directly or indirectly contact the interviewer(s) prior to or following the interview process.

The submission of responses to this RFP constitutes a declaration by the submitting firm that no person or persons other than members of the firm's own organization are interested in the project or in the Contract proposed to be awarded; that the submission is made without any connection with any other person or persons making a proposal for the same services and is in all respects fair and without collusion or fraud; that no persons acting for or employed by the Board or the Town of Sherman is directly or indirectly interested therein, or in the supplies or works to which it relates or will receive any part of the profit or any commission therefrom in any manner which is unethical or contrary to the best interests of the Board and the Town of Sherman.

Qualifications

Qualification Criteria: The Board will identify those firms that the Board deems to be Qualified Firms based on the criteria below (the "Qualification Criteria"); these items should be considered when respondents prepare their Statement of Qualifications.

1. The firm is a legal entity properly licensed or registered under the laws of the State of Connecticut to perform the services that are the subject of this solicitation and is otherwise authorized to do business in the State of Connecticut. The firm is able to demonstrate an adequate level of performance on past projects, including, without limitation, adherence to project schedules and project budgets and the satisfaction of past districts with such performance.
2. The firm's staff proposed to be assigned to the Project ("Project Team") has satisfactory qualifications and experience on past projects of similar size and scope as the Project.
3. The firm is able to demonstrate that the members of the Project Team have performed satisfactorily on past projects to the satisfaction of the districts of such projects.
4. The firm has an adequate degree of contract oversight capability and the organizational, team, and management structure proposed for the Project is satisfactory.
5. The number, context, and, where applicable, outcomes, of claims, disputes, arbitration, and litigation proceedings involving the firm are acceptable.
6. The firm's approach to the Project and degree of the firm's demonstrated ability to develop and control project costs, quality, and schedule as well as the firm's methods for doing so, is satisfactory.
7. In addition to the foregoing, the following criteria shall also be considered:
 - a. Training and experience including that of partners and associates.
 - b. Planning ability and promptness.
 - c. Specification writing, accuracy and sufficiency of detail.
 - d. Experience with municipal government agencies.

Request for Proposals

Proposal Criteria: The proposal criteria includes the following:

1. The firm's fee proposals
2. The firm's proposed schedule
3. The level of financial stability of the firm
4. The level of the firm's insurance coverage
5. The degree of resources of the firm that will help facilitate the Project

Content of Response to RFP: The response to the RFP shall include the following information in the order listed below:

1. One lump sum fee proposal for the services
2. Evidence of required insurance coverage
3. Descriptions of other resources of the firm that will help facilitate the Project

The Board reserves the right to withdraw the RFP, to waive any informality or irregularity in any submissions received, to negotiate changes to offered terms, to reject any and/or all submissions, and to make an award that is in the best interest of the Town/Board.

IX. Insurance Requirements for Selected Firm

The selected Firm shall be required to furnish a certificate of Insurance ensuring the following insurances coverage within five (5) days of receipt of notice of award. Failure to maintain insurance coverage as required and to name the Town of Sherman and Sherman Board of Education and the selected Construction Manager as the Additional Insureds will be grounds for termination of the contract.

Commercial General Liability Insurance:

- a. The Firm shall provide Commercial General Liability insurance with a combined single limit of 1,000,000 per occurrence, \$2,000,000 aggregate for bodily injury and property damage.
- b. The CGL shall be written on ISO occurrence form CG 00 01 10 93 (or a substitute form providing equivalent coverage) and shall cover liability arising from premises, operations, independent contractors, products-completed operations, personal injury and advertising injury, and liability assumed under an insured contract (including the tort liability of another assumed in a business contract).

Worker's Compensation Insurance:

- a. The firm shall provide Workers Compensation Insurance in the required amount as applied to the State of Connecticut and Connecticut employers.
- b. Liability Insurance as follows:
 - Bodily Injury by Accident - \$100,000 each accident
 - Bodily Injury by Disease - \$500,000 policy limit
 - Bodily Injury by Disease - \$100,000 each employee

Professional Liability Insurance:

- a. The firm shall provide Professional Liability insurance with a combined single limit of \$2,000,000 per occurrence, \$2,000,000 aggregate.
- b. Policies shall include a waiver of subrogation in favor of the Town of Sherman and the Sherman Board of Education and shall provide no less than thirty (30) days notice to the Town and the Board in the event of a cancellation or change in conditions or amounts of coverage. The Commercial General Liability, Automobile, and Umbrella Liability shall name the Town of Sherman, the Sherman Board of Education as an additional insured.
- c. Certificates of Insurance, acceptable to the Sherman Board of Education shall be delivered to the Board prior to the commencement of the work and keep in force throughout the term as required under the Contract.
- d. The above insurance requirements shall also apply to all sub-consultants and/or subcontractors to the Firm and the Firm shall not allow any sub-consultants and/or subcontractors to commence work until the sub-consultants and/or subcontractors insurance has been so obtained and approved.
- e. The above insurance requirements and certificate are subject to final approval by the Town's Insurance advisor as to form and substance and could require changes.

Indemnification:

- a. To the fullest extent permitted by law, the Firm shall defend, indemnify and hold Sherman and the Sherman BOE harmless from and against all claims, damages, expenses and judgments that arise from or are alleged to arise from the firm's performance on this project and from this Agreement.

X. Non-discrimination

The Sherman School District is committed to a policy of equal opportunity/affirmative action for all qualified persons. The Sherman School District does not discriminate in any employment practice, education program, or educational activity on the basis of race, color, religious creed, sex, age, national origin, ancestry, marital status, sexual orientation, gender identity or expression, disability (including, but not limited to, intellectual disability, past or present history of mental disorder, physical disability or learning disability), genetic information, or any other basis prohibited by Connecticut State and/or Federal nondiscrimination laws and provides equal access to the Boy Scouts and other designated youth groups. The Sherman School District does not unlawfully discriminate in employment and licensing against qualified persons with a prior criminal conviction. Inquiries regarding the Sherman School District nondiscrimination policies should be directed to:

Dr. Jeff Melendez
Superintendent-Principal
The Sherman School
2 Rt. 37 E
Sherman, CT 06784
Phone: (860) 355-3793
email: melendezj@shermanschool.com