

REQUEST FOR PROPOSALS

Elmira Heights CSD and Horseheads CSD

Proposed Consolidation Feasibility Study

The **Elmira Heights Central School District** and **Horseheads Central School District** are interested in receiving proposals from educational/financial consultants to conduct a Reorganization Feasibility Study, whereby the Elmira Heights Central School District and the Horseheads Central School District would consolidate.

Goals and Objectives:

The goal of the Project is to complete a thorough and comprehensive Feasibility Study which will inform the public and guide future planning for the School Districts. Achievement of this goal will be supported by accomplishment of the following objectives:

- 1. Identify possible operational efficiencies which would be realized by combining the School Districts.*
- 2. Determine the impact on educational opportunities for students which would result from combining the School Districts.*
- 3. Provide an estimate of the potential cost savings and the impact on local property taxes, both short-term and long term, that would be realized by combining the School Districts.*

Form of Proposal

Each firm shall submit **one original proposal and two copies to each** of the following addresses:

*Mary Beth Fiore
Superintendent
Elmira Heights Central School District
2083 College Avenue
Elmira Heights, NY 14903*

*Ralph Marino, Jr., Ed.D.
Superintendent
Horseheads Central School District
One Raider Lane
Horseheads, NY 14845*

Proposals are to be submitted in a sealed envelope clearly labeled **“Consolidation Feasibility Study Proposal”** on or before **May 16, 2014 by 3:00 p.m.**

There is no expressed or implied obligation for the Districts to reimburse responding individuals or firms for any expenses incurred in preparing quotations, attending pre-quotation conferences, or interview(s) in responding to this RFP. RFPs submitted after the stated time and date will not be considered and will be returned to the firm unopened.

Incomplete submissions will not be considered for award. Proposals should not be excessively long, and should be submitted in a format that permits copying for review.

All proposals and accompanying documentation become the property of the School Districts.

The Consultant will work with the Superintendents of Schools, the respective Boards of Education, and the Community Advisory Committee, (CAC), made up of 15-20 community members of each district.

Brief Description of the Districts

	Elmira Heights CSD	Horseheads CSD
Administration	Mary Beth Fiore Superintendent	Ralph Marino, Jr., Ed.D. Superintendent
Enrollment	1090	4238
Number of employees	165	628
Number and tenure of Board members	7 Members/5 Year Terms 2 seats up in 2014 (Lisa Benedict/Bill Brewer) 1 seat up in 2015 (Joe Sullivan) 1 seat up in 2016 (Harry Blish) 2 seats up in 2017 (Chris Callas/Harvey Harris) 1 seat up in 2018 Andrew Willard	9 Members/3 Year Terms 3 seats up in 2014 (Warren Conklin, Brian Lynch, Pam Strollo) 3 seats up in 2015 (Rose Apgar, Mark Brinthaup, Doug Johnson) 3 seats up in 2016 (Karen Boulas, James Jacobus, David Sadler)
2013-2014 annual budget	\$20,054,526	\$71,640,654

The successful proposal should cover the following:

General Agreement

(1) The Consultant will provide the following services:

a) **Complete Financial Analysis.**

■ Financial Analysis of each District

- Expectation to meet with each Town Assessor to gather both primary and secondary data to assess pending charges and any potential impacts
- Expectation to meet with 15 largest employers to identify:
 - Employment projections
 - Employment historical averages
 - Anticipated expansion or future PILOT programs
 - Longevity expectation

b) **Composition of Classrooms.**

- A detailed analysis of the composition of classrooms in both School Districts (i.e., special education, regular education, inclusion philosophy, advanced placement, specialty courses)

c) **Communications.**

- Conduct three (3) joint meetings with Boards of Education during Task 5 on projected timeline
- Maintain regular contact with Superintendents
- Conduct organizational meeting with the Community Advisory Committee (CAC)
- Provide published minutes uploadable to website within seven (7) business days
- Conduct monthly work sessions, at minimum, with CAC
- Advise and assist Districts with media and public information
- Communicate progress/status with District Superintendents and SED
- Produce and communicate final report to joint Boards of Education and CAC
- Work on-site and remotely to collect information and develop recommendations consistent with study agreement
- Provide assistance up to two (2) pre-referendum public sessions in each District

Other Issues to be Studied and Presented to Boards and Public

1. Governance
2. Personnel and Collective Bargaining Agreements
3. Pupil enrollment
4. Facilities
5. Transportation
6. Instructional program for children
7. Co-curricular offerings
8. Locally developed assurances/guidelines
9. Other areas of concern as identified by the communities

Please delineate how you, as Consultant, would break down the above study areas. The successful applicant will incorporate the list of elements in Task 5 in the above description.

d) **Districts will:**

- Provide for availability of District personnel needed to complete study
- Make available allowable District records needed to complete study
- Select and provide notices to CAC
- Provide copying of multiple produced agendas, minutes, meeting notice, work session documents, etc. and necessary postage or shipping
- Provide adequate meeting space for CAC

Projected Timeline

**Task
1**

Task: SEQRA Review
Schedule: Month 1 (**March 2014**)
Deliverable: Letter Stating Findings

An environmental review will be completed as required in Section XV of this contract agreement and transmitted to the Department of State (“DOS”).

**Task
2**

Task: Develop Request for Proposals and Hire Consultant
Schedule: Months 1-2 (**April – June 2014**)
June 9, 2014—Publicly interview 2-3 Consultant finalists
June 23, 2014--Appoint a Consultant
Deliverable: Copy of RFP & Contract with Consultant

The Partners’ governing bodies (“School Boards”) will develop a Request for Proposals to aid in the selection of a qualified Consultant to assist in the development of the Feasibility Study. The School Boards will review and may interview respondents, and will then recommend a qualified Consultant (“Consultant”) to the Contractor. The Contractor and Consultant will enter into a contract for professional services.

**Task
3**

Task: Form Community Advisory Committee
Schedule: Months 2-3 (**July – August 2014**)
Deliverable: Notice of Committee Formation

The School Boards and Consultant will organize a Community Advisory Committee (“CAC”) composed of at least 10 members from each School District and charge it with providing feedback to the School Boards and Consultant in developing the Feasibility Study. The Feasibility Study will form the foundation for a reorganization referendum. The New York State Education Department (“NYSED”) and School Boards will be responsible for final acceptance/rejection of the Feasibility Study.

**Task
4**

Task: Project Initiation
Schedule: Months 3-4 (**September 2014**)
Deliverable: Kick-Off Meeting Summary

The Contractor’s Superintendent and/or Consultant shall meet with DOS prior to initiating work on the Project to discuss LGE grant requirements and expectations. The Consultant, with input from the CAC, shall be charged with developing the Feasibility Study, including fiscal impacts, curriculum expansion,

transportation, and other matters as identified. The School Boards and Consultant will initiate the Project with a kick-off meeting.

**Task
5**

Task: Reorganization Plan Development

Schedule: Months 4 –12 (**September 2014 – May 2015**)

Deliverable: Copy of Draft and Final Reorganization Plan

The Consultant, with input from the CAC, shall develop a draft Feasibility Study. Upon completion of the draft, a copy will be submitted to NYSED and the School Boards for review. Upon acceptance of the draft by NYSED and the School Boards, a copy of the draft will be submitted to DOS. The draft Feasibility Study will contain at least the following elements:

1. Background descriptions of the School Districts.
2. History and future calculations of enrollment projections for elementary, middle, and high school(s) of the existing School Districts as well as the potential merged School District.
3. A quantified list of increased/decreased, academic opportunities and experiences, for all K-12 students, attendant with consolidation.
4. A quantified list of increased/decreased, extra/co-curricular opportunities and experiences, for all K-12 students, attendant with consolidation.
5. Based on past/present state aid, prior district budgets, and potential merger assistance; the Consultant will develop financial projections and plans for a consolidated School District.
6. The Consultant and the CAC will assess and report on the ability of existing facilities to accommodate consolidated educational programs. The Consultant and the CAC will make a specific recommendation for a plan to house elementary, middle, and high school students within existing buildings, closing buildings, and/or expanding certain buildings to meet the consolidated School District's needs.
7. The Consultant will review existing employee Collective Bargaining Agreements that would bear directly on the consolidation of the School Districts' staffs.
8. The Consultant will project full/assessed tax rates per \$1,000 for the first, post consolidation year compared with the tax rates for the individual School Districts had a consolidation not occurred.
9. The Consultant will determine transportation needs for the consolidated School District.
10. The Consultant will project reduced/increased instructional (administrators, teachers and support staff) and non-instructional (administrative, business operations) needs for the first year, post-consolidation.

**Task
6**

Task: Submittal of Draft

Schedule: Month 13 (**June 2015**)

Deliverable: Copy of Draft Feasibility Study

The Consultant will submit a draft of the Feasibility Study to NYSED.

Task
7

Task: Presentation to School Boards
Schedule: Month 14 (**September 2015**)
Deliverable: Copy of Final Feasibility Study

Once the draft Feasibility Study has been accepted by NYSED, the study findings will be presented to the School Boards in a joint or separate meeting(s). The School Boards will adopt a final reorganization plan with revisions if necessary. A copy of the final Feasibility Study will be submitted to NYSED and DOS.

Task
8

Task: Public Meetings
Schedule: Month 15 (**October – November 2015**)
Deliverable: Notice of Meeting Dates and Meeting Summary Report

At least one public meeting will be held in each of the School Districts to review the Feasibility Study. The Consultant and the CAC will also conduct various public information/educational/discussion activities (pamphlets, website, roundtables, etc.) to inform the public about the Feasibility Study and its recommendations.

Task
9

Task: Advisory Referendum or Petition
Schedule: Month 16 (**December 2015**)
Deliverable: Results of Vote

The School Districts will decide if they will undertake the statutory reorganization process. An advisory referendum (“Straw Vote”) will be held in each community affected by the potential reorganization to gauge community support before the Commissioner of Education can take formal action to authorize such reorganization.

Task
10

Task: Statutory Vote
Schedule: Month 17 (**January 2016**)
Deliverable: Results of Vote

If the Straw Vote is successful, a formal referendum will be held in each community affected by the reorganization. The School Districts will follow the steps outlined in the centralization timeline developed by NYSED. The results will determine if the reorganization will take place. The referendum must pass in each School District.

Task
11

Task: Grant Project Close-Out
Schedule: Month 18 (**February 2016**)
Deliverable: DOS Grant Close-Out Documents

The Contractor will complete the required LGE grant close-out paperwork with DOS.

Interviews

The award process may include two (2) rounds of interviews with both Boards of Education. These interviews will allow for up to a 45-minute presentation and time for questions/answers by the Boards.

Termination of Contract

Any agreement made between the Districts and the Consultant is subject to termination and may be terminated by either party with thirty (30) days written notice. The Boards of Education are subject solely to payment of fees and disbursements as of the date of termination. The Consultant will provide any research gathered and work completed as of the same date.

References

Provide details of previous experience in this line of work to include:

- Methodology used
- Reference Statements
- A comprehensive list of previous studies completed

Fee

Proposed bids should contain an all-inclusive fee structure