

Request for Proposals

Dansville Central School District Strategic Planning

Deadline for Submission: July 9, 2021

PURPOSE

The purpose of this Request for Proposal (RFP) is to solicit proposals from consultants experienced in strategic planning to lead the Dansville Central School District (DCSD) through a comprehensive needs assessment and five-year strategic planning process.

Specifically, DCSD is seeking a consultant to provide the following services:

Conduct a comprehensive needs assessment measuring perceptions of all stakeholder groups.

Compile a summary of findings and determine priorities based on the comprehensive needs assessment.

Articulate a Strategic Framework for DCSD for 2021-2026. All aspects of the Strategic Framework will be based on the findings of the comprehensive needs assessment.

Identify clear, measurable outcomes for organizational and strategic effectiveness, impact and success.

Establish a process for the organization's leadership to effectively plan, implement and monitor progress toward goals and objectives.

Facilitate all meetings and provide expert consultation and advice related to the development of an effective strategic framework, including successful implementation.

Produce a clear, easily consumed, overall strategic framework roadmap, including a timeline and implementation plan.

BACKGROUND INFORMATION

DCSD Vision:

DCS students will exemplify the drive, capability and compassion to achieve their full potential while contributing to our evolving local and global communities.

DCSD Mission:

The Dansville school community is committed to providing a high quality education for all students of the school district to;

Educate each student to his/her fullest potential;

Prepare all students for the world of work and/or further formal education;

Promote the development of responsibility, mutual respect and self discipline in learning and personal behavior;

Challenge and encourage students to become lifelong learners and creative, critical thinkers toward a better world.

DCSD History:

Dansville's first school opened in 1798. As was typical of the time a number of small schools sprang up over the next several decades. However, as the population grew, discussion began in 1881 to merge several of the local districts into one. In 1883 a Union school meeting was held to officially merge two district schools into one. Later that year the Union school opened and with it Dansville had its first public high school. In 1885 the school was registered with the New York State Education Department and could henceforth grant diplomas. In 1926 a central School District was created as the districts of North Dansville, Town of Dansville (Steuben County), and West Sparta combined to become one district. The following year the new high school (now occupied by Genesee Community College on Clara Barton Street) opened its doors.

As the population continued to grow and the existing school aged, it was decided that a new elementary school was needed. The current school opened in 1953. The building was named for the former principal and Superintendent Ellis B. Hyde in 1960. The primary school opened in 1968 and grades K-3 moved from the elementary school into the new building. Overcrowding in the high school caused the district to go to "double sessions" in 1962 as the school board tried to offer a building plan the voters would approve.

Finally the new high school building was built and opened in September, 1965. Grades 10-12 attended the high school while grades 7-9 remained at the Clara Barton Street building. In 1994 the configuration changed as the 9th grade moved to the High School and grades 6-8 now studied in the Middle School. In 2011 the Clara Barton Street school was closed and all students now attend classes at the North Main Street campus. DCSD currently serves approximately 1540 PK-12 students.

ISSUES TO BE ADDRESSED/SCOPE OF WORK

In developing the plan, the applicant selected for this project will be expected to:

Work with district staff to coordinate the timeline of activities.

Comprehensive Needs Assessment:

Collect data from all stakeholder groups regarding district needs, using a research-based framework for the process.

Review district plans and other relevant documents from the last three years that will inform the current state of the district.

Create a summary of findings and recommendations based on feedback from all stakeholders and documents reviewed.

Strategic Planning:

Facilitate discussions around needs, assessment findings to determine district priorities and goals.

Work with district staff to create a Strategic Framework and action plans that will include goals, objectives, action steps, timeframes and evaluation measures.

Additional areas to be addressed in the creation of a strategic plan include, but may not be limited to:

Communication strategies regarding the comprehensive needs assessment and planning activities.

A review of external grant funded initiatives.

PROJECT REQUIREMENTS & TIMELINE

1. Proposals must include a clear description of the applicant's plan to complete all of the project components including a detailed work breakdown structure, with time frames, of the steps that will be taken to develop a strategic framework (i.e. in what order will the project components be completed, how long each component will take to complete, etc.).
2. Applicants are to propose which aspects of the project will require district staff involvement and include the expected time requirements for all activities involving their participation. While DCSD understands that completing this project requires significant and active district involvement, it is important to note that the applicant selected will be responsible for

completing all project work products and final deliverables (e.g., needs assessment protocols, needs assessment report and executive summary, planning documents, etc.).

3. The applicant will be responsible for scheduling regular meetings to provide status updates, review progress and findings and producing all materials related to the meetings. Preliminary findings and recommendations will be presented and reviewed on an on-going basis. Project deliverables and the strategic framework will be reviewed by DCSD with iterative reviews incorporating feedback and input before finalizing.
4. The project work will take place over the course of the year, commencing with pre-work in August 2021 and completion of the final Strategic Plan for presentation to the Board in June 2022.

EVALUATION CRITERIA

Minority and Women Owned Business Enterprises (MWBE) applicants/ consultants are strongly encouraged to apply. In awarding a contract for consulting services to develop a long-range strategic plan for the organization, DCSD will examine several factors and criteria which will include:

1. The extent to which the proposal addresses the stated issues and clearly describes the scope of work.
2. Specific plans or methodology to be used to perform the services.
3. Qualifications and experience of consultant in providing strategic planning development.
4. Availability for work to begin no later than August 2021 with a draft strategic plan presented to the DCSD board no later than May 2022 and a final strategic plan completed by June 2022.
5. Project cost.
6. The suitability of the individual/firm for the District's needs.
7. The special knowledge or expertise of the individual/firm.
8. The quality of the service provided by the individual/firm.
9. The staffing available from the firm or the time available from the individual.

SELECTION PROCESS

THE BOARD OF EDUCATION RESERVES THE RIGHT TO ACCEPT OR REJECT ANY OR ALL PROPOSALS OR ANY PARTS OF PROPOSALS.

The original copy of all proposals received will be kept on file in the District's central office.

Action	Date
Proposal Distribution	June 1, 2021
Proposals Due	July 9, 2021

Proposals Opened and Reviewed	June 9, 2021 through July 16, 2021
Committee Interview (If Needed)	Week of July 19, 2021
Board of Education Appointment	August 10, 2021

Proposals will be evaluated by a committee of school administration and District stakeholders. During the evaluation process, the Dansville Central School District reserves the right, where it may serve the District's best interest, to request additional information or clarifications from those submitting proposals.

It is anticipated that the selection of a firm will be completed by July 31, 2021. Following the notification of the selected firm, a contract will be executed between both parties as soon as possible thereafter.

APPLICATION PROCESS & PROCEDURES

Proposals should include:

1. A brief Executive Summary
2. A description of the applicant's general approach to strategic planning consultation, including methodology, perspective, or philosophy that guides your work with organizations in this undertaking.
3. A list of project deliverables to be created with a detailed timeline for each deliverable and overall project completion.
4. A detailed budget that breaks out expenses.
5. Credentials and qualifications of key personnel who will take responsibility for working directly on this project, including three references.
6. Example(s) of a finished strategic plan created by your company.

Please note that DCSD will not return any proposals it receives and will not reimburse applicants for any costs they incur in developing their proposals.

Completed proposals should be sent by **July 9, 2021** via email to Margaret Mistretta: mistrettama@dansvillecsd.org. Any proposals received after this deadline will be returned unopened to the firm. The District is not responsible for proposals which are not delivered to the correct email address.

INQUIRIES

All inquiries concerning this RFP should be in writing citing a particular RFP section and directed to: Margaret Mistretta: mistrettama@dansvillecsd.org.

NOTIFICATION OF AWARD

After evaluation and selection of the successful applicant, all applicants will be notified of the acceptance or rejection of their proposals. The name of the successful applicant may be disclosed.

DISCLOSURE OF PROPOSAL CONTENTS

To the extent permitted by law, applicants' proposals will not be disclosed, except for purposes of evaluation, prior to approval of the resulting contract by the District. All material submitted becomes the property of the District and may be returned or retained at the Districts' discretion. Submitted proposals may be reviewed and evaluated by any person, other than one associated with a competing applicant, as designated by the District. The District reserves the right to use any and all ideas presented in any response to the RFP. Selection or rejection of a proposal does not affect this right. If a vendor believes that any information in its proposal constitutes a trade secret or sensitive financial information 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 specially identifying the page number, line or other appropriate designation that information which is 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.

CONFIDENTIALITY

The Vendor acknowledges that any and all information, records, files, documents or reports provided to the Vendor by the District shall be considered confidential and shall be handled accordingly at all times. It shall be the Vendor's responsibility to protect and insure all portions of the District's materials and records in its possession. Neither the Vendor nor any of its employees, contractors, agents or volunteers shall at any time be permitted to utilize such confidential information for any purpose outside the scope of this agreement without the expressed prior written authorization of the District's Board of Education. Any breach of this confidentiality by the Vendor or any of its employees, agents or volunteers may result in the immediate termination of any resulting agreement by the District.

CONTRACT TERMS

These specifications will become part of any "contract" forms that may be required and will take precedence over any other terms or conditions submitted by the Vendor. The agreement resulting from this RFP shall be governed by and construed under the laws of the State of New York, and shall be in substantially the same form as that enclosed hereto as Addendum A.

ASSIGNMENT

The Vendor shall not sell, assign, nor otherwise transfer any portion of the contract or the work responsibility and obligations hereunder, without written consent from the District.

ORAL PRESENTATION

The District reserves the right to require all applicants, under final consideration, to make oral presentations to the District Business Department regarding their RFP.

INSURANCE REQUIREMENTS

- a) Prior to any cancellation of, or material change in the policies certified to on this certificate, 30 days written notice, by certified mail, return receipt requested, shall be sent to the Business Office, prior to the effective date of such change or cancellation.
- b) Each certificate shall include Owner Dansville Central School District as "Additional Insured".
- c) Workmen's Compensation and Employers Liability Insurance - Statutory Workmen's Compensation and Employers Liability insurance coverage as required by the State Law in which the project site is located, and in the state in which the contractor is domicile, and licensed to do business, and for all of his employees to be engaged in work on the project under this contract, and in case such work is sublet, the Contractor shall require the subcontractor similarly to provide Workmen's Compensation and Employer's Liability insurance for all of the latter employees to be engaged in such work. The policy shall contain the New York Amendatory Endorsement for Part II.
- d) Commercial General Liability Insurance including Premise/Operations, Independent Contractors, Products and completed Operations, Broad Form Property Damage, Broad Form Liability endorsement and blanket coverage for the underground hazards; X (explosion) C (collapse) U (underground). Minimum limit: \$1,000,000.00
- e) Umbrella Liability. Limit \$1,000,000.00 per occurrence and \$1,000,000.00 aggregate coverage excess over Underlying Commercial General Liability, Automobile Liability, and Employers' Liability Policies.
- f) Professional Liability (Malpractice/Errors-Omission) - Minimum of \$1,000,000.

DATA PRIVACY AND SECURITY

Protection of Confidential Data: The successful vendor shall provide the contracted services in a manner which protects Student Data (as defined by 8 NYCRR 121.1(q)) and Teacher or Principal Data (as defined by 8 NYCRR 121.1(r)) (hereinafter “Confidential Data”) in accordance with the requirements articulated under Federal, New York State and local laws and regulations, including but not limited to Education Law Section 2-d and the associated regulations (8 NYCRR Part 121).

Data Breach: In the event that Confidential Data is accessed or obtained by an unauthorized individual, the vendor shall provide notification to the School District without unreasonable delay and not more than seven calendar days after the discovery of such breach. The vendor shall follow the following process:

- The security breach notification shall be titled “Notice of Data Breach,” shall be clear, concise, use language that is plain and easy to understand, and to the extent available, shall include: a brief description of the breach or unauthorized release; the dates of the incident in the date of discovery; a description of the types of Confidential Data affected; an estimate of the number of records affected; a brief description of the vendor’s investigation or plan to investigate; and contact information for representatives who can assist the School District with additional questions.
- Where a breach or unauthorized release of Confidential Data is attributed to the vendor, the vendor shall pay for or promptly reimburse the School District for the cost of notification to parents and eligible students of the breach.

2-d Addenda:

NY Education law and regulations require that a third-party contractor that receives personally identifiable student, teacher, and/or principal data from a school district must meet certain data security standards and incorporate certain language into any written agreement between the contractor and a school district. The law requires that every agreement between a school district and a third-party contractor receiving student, teacher and/or principal data must include as attachments the following documents

- Addendum A: Parents’ Bill of Rights for Data Privacy and Security
- Addendum B: Parents’ Bill of Rights – Supplemental Information Addendum
- Addendum C: Third-Party Data Security and Privacy Plan

In the event the successful proposer will receive personally identifiable student, teacher, and/or principal data, these addenda shall be incorporated into the parties’ agreement, and shall supersede any inconsistent provisions in the agreement.

Certification

The undersigned hereby certifies that he/she has full authority to submit the Proposal and does further declare that he/she or they are the only person or persons interested in the Proposal and has not entered into any collusion in preparing the Proposal.

The undersigned acknowledges that there will not be cost to the Owner pertaining to the submission of this Proposal and the Owner(s) has the right to reject any or all proposals.

The undersigned agrees no proposal will be withdrawn within forty-five (45) days and the School District shall be permitted to accept this Proposal within forty-five (45) days of the proposal date.

The undersigned acknowledges that he/she or they are fully aware of the time constraints and coordination required as outlined in the RFP and agrees, if awarded the Contract, to submit all required insurance certificates, and any other required documents before work starts.

The undersigned acknowledges that the District reserves the right to negotiate with any applicant whose proposal is within the competitive range. Additionally, the undersigned acknowledges that he/she or they are aware that the Board at its discretion may assign work normally performed under this contract to its employees or employees of other municipalities and or governmental subdivisions.

Respectfully submitted,

Name of Firm

By:

Authorized Signature

Printed/Typed Name

Title

Dated

Submission by Prospective Consultants

The submitted proposals must state and/or include responses to the following specifications:

- A. Provide a letter of transmittal containing the prospective consultant's understanding of the work to be performed, a commitment to meet required timelines.
- B. Provide a schedule fee for requested services (Form C).
- C. Provide summary firm information (Form B).
- D. Provide names and resumes of personnel to be assigned to this study (Attached to Form B).
- E. Provide the names of current and former school district clients with information on the number of years of service to each, along with the name and telephone number of a contact person in each such district. (Form A)
- F. Provide information regarding the expertise and experience in providing the services.
- G. Provide information concerning the approach to the study.
- H. Provide a description of any regulatory action taken within the last 5 years by an oversight body, including but not limited to the State Education Department, or the Internal Revenue Service, against the individual/firm.

**FORM A:
Customer Reference List**

BOCES/School District	No. of Years as Client	Contact Person	Phone

**FORM B:
VENDOR IDENTIFICATION**

Name of Organization _____
 Address of Organization: _____

Contact Person and Title _____
 Phone: () _____

Are you incorporated: () Yes () No

a) If yes, in what State are you incorporated? _____

b) If you are not incorporated in New York State, are you authorized to do business in New York? _____

If you are not incorporated, please check the appropriate line below:

- _____ Partnership
- _____ Sole Proprietorship
- _____ Unincorporated Association
- _____ Other (please specify) _____

	Firmwide Totals	Responsible Office
No. of Shareholders		
No. of Principals		
No. of Managers		
No. of Seniors		
No. of Staff		
No. of Support Staff		

**FORM C:
Statement of Fees**

Complete cost to provide the services set forth in this Request for Proposals, with completion of the final Strategic Plan for presentation to the Board in June 2022.

\$ _____ Total

Each proposal should include information about how the related price was determined and include a schedule of estimated hours and hourly rate.

Submitted by: _____

Company: _____

Authorized Signature: _____

Name *(Print/Typed)*: _____

Title: _____

Date: _____