



THE SCHOOL DISTRICT OF PHILADELPHIA

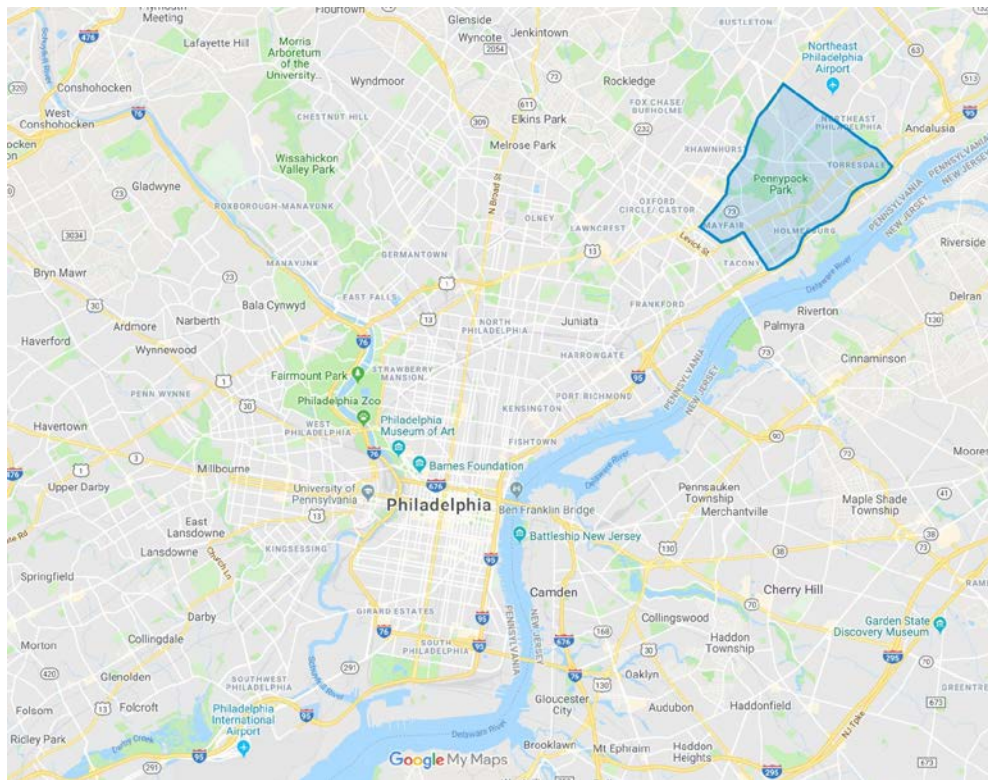
Office of Capital Programs
440 North Broad Street, 3rd Floor
Philadelphia, PA 19130-4015

REQUEST FOR PROPOSALS

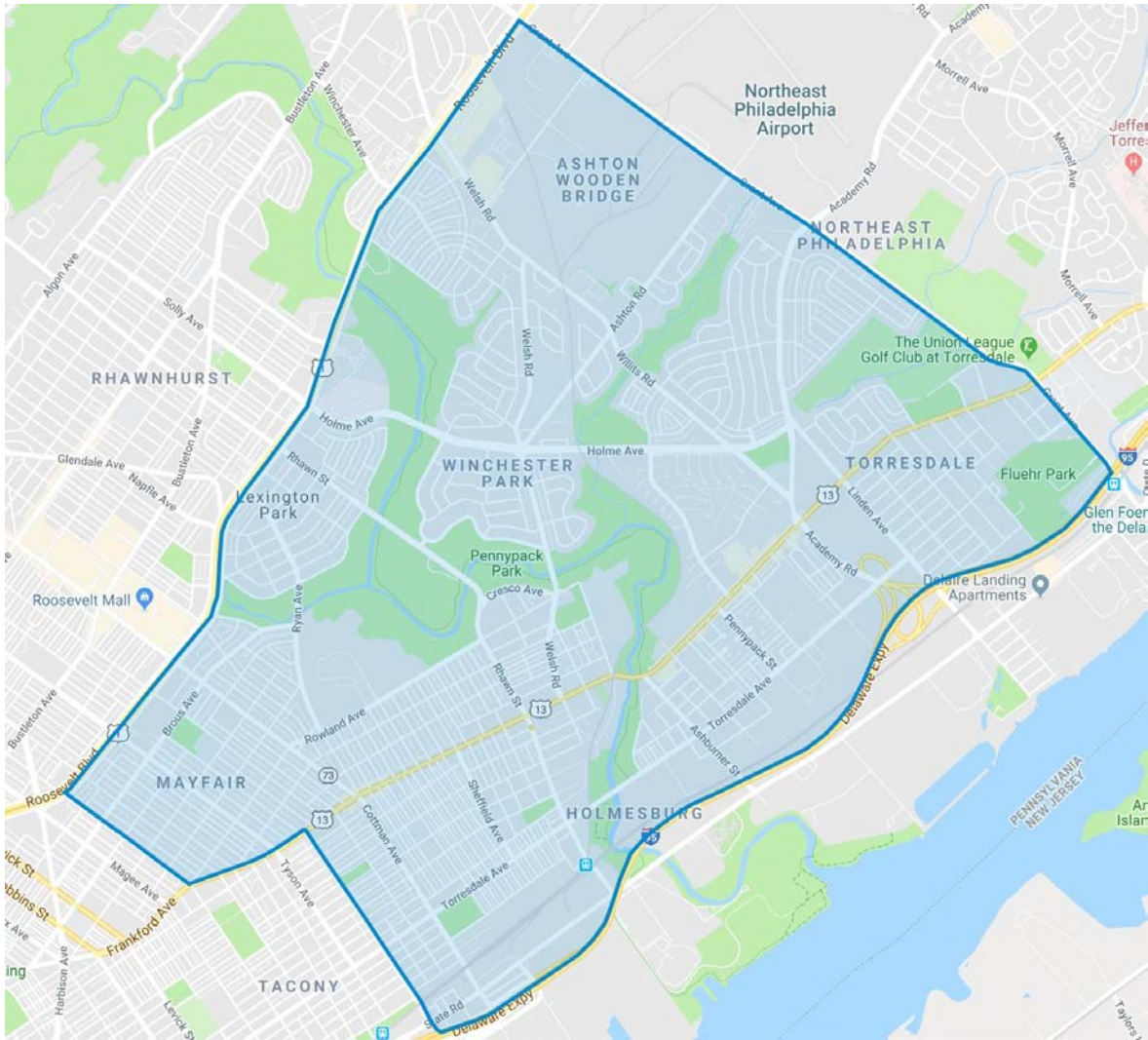
COMPREHENSIVE DEMOGRAPHIC STUDY OF NORTHEAST PHILADELPHIA DUE: OCTOBER 23, 2018

1.0 Subject

The School District of Philadelphia (“SDP”), through the Office of Capital Programs (“OCP”) is requesting proposals from qualified firms to **prepare a comprehensive demographic study of, and provide redistricting options for**, the following sections of Northeast Philadelphia: Mayfair, Tacony, Holmesburg, Torresdale, Winchester Park and a portion of Wissinoming. The eight square mile region is bordered by Grant Ave to the Northeast, Roosevelt Blvd to the Northwest, Interstate 95 to the Southeast, and from Princeton St to Frankford Ave to Unruh St to the Southwest. It encompasses a portion of Pennypack Park. The study shall cover the period from the 2013-2014 school year through the 2033-2034 school year.



Philadelphia city map showing study area highlighted



Close up of study area

2.0 Background

OCP is responsible for identifying and prioritizing capital work within the SDP. OCP shares responsibility for the long-term upkeep and replacement of critical building systems over 25.6 million square feet including nearly 300 buildings, annexes, administrative buildings and athletic fields. OCP works closely with the Office of Facilities and Maintenance, the Office of Real Property, and the Office of General Counsel.

The School Reform Commission (SRC) adopted the Capital Budget for FY 2019 on May 24, 2018. The Capital Budget is funded by the sale of bonds usually repayable with interest over 30 years. The Capital Budget is the basis for the multi-year Capital Improvement Program (CIP). Projects are selected for inclusion in the CIP using building condition assessment reports, work order and deferred maintenance data, input from field maintenance employees and school administrators, and the priorities identified in the Superintendent's Strategic Action Plan. CIP

priorities include maintaining the physical integrity of existing facilities, upgrading existing facilities to meet code requirements and educational program needs, replacing systems that have exceeded their lifecycle, and constructing new facilities and additions.

SDP defines specific boundaries to geographic areas to be assigned to a specific school. These geographic boundaries are known as catchment areas. Students who live in the catchment areas can attend that specific school unless they chose otherwise.

The five elementary schools in the geographic area listed above, Holme, Pollock, JH Brown, Forrest, and Mayfair are severely overcrowded. SDP is planning on constructing a new K-8 school to relieve overcrowding in a portion of Northeast Philadelphia as described above. In order to do so, SDP is seeking professional services of Demographic Analysts to assist in the definition of a new catchment area in the center of the area of study.

The community is ethnically diverse with preserved cultural traditions and languages. SDP is seeking not to disturb the diversity balance of any one school community included in the study.

3.0 Place and Date of Submission

One (1) original, four (4) copies, and 1 digital copy (locked pdf on a CD or USB Drive) each of the Technical Proposal and Fee Proposal shall be submitted in separate sealed envelopes clearly marked:

- "Comprehensive Demographic Study of Northeast Philadelphia – TECHNICAL PROPOSAL - Due 10/23/2018" with the name of the Proposer's firm and their address; and
- "Comprehensive Demographic Study of Northeast Philadelphia – FEE PROPOSAL - Due 10/23/2018" with the name of the Proposer's firm and their address.

Faxed and Electronically Transmitted Proposals shall not be accepted.

Responses must be received no later than 3:00 PM, Tuesday, October 23, 2018.

The Proposal shall be addressed to:

The School District of Philadelphia
Office of Capital Programs, Suite 371, Office 3165
440 North Broad Street
Philadelphia, PA 19130
Attn: Jesse Jones

4.0 Communications

All questions must be submitted in writing by mail to the address listed above or via e-mail to capitalbids@philasd.org. The subject line must include the name of the project: "Comprehensive Demographic Study of Northeast Philadelphia".

The deadline for all questions is 3:00 PM, Tuesday, October 9, 2018. All responses for every inquiry, including amendments to this RFP, will be provided and posted on the Office of Capital Programs' website, which can be accessed by clicking on the following link: <https://www.philasd.org/capitalprograms/programsservices/contracts/current-rfps-requests-for-proposals/>

The SDP shall not be bound by any oral communications. From the date of the release of the RFP to the date of authorization of a contract, there shall be no communication concerning the RFP between prospective respondents and/or their agents or staff with any SDP staff, except as provided in the RFP. Communication with other SDP staff is expressly prohibited. Any communication in violation of this provision shall not be binding on the SDP and shall be grounds for immediate disqualification.

5.0 Pre-Proposal Meeting

A pre-proposal meeting will be held on **Tuesday, October 2, 2018 at 3:00 PM** at the following location:

SDP Office of Capital Programs
 Conference Room 3126
 440 North Broad St, Philadelphia, PA 19130

Please RSVP to Sara Nordstrom at snordstrom@philasd.org by Monday, October 1, 2018 at 12:00 PM. If you would like to join the meeting remotely, please indicate as such in your message and you will receive call-in information.

6.0 Schedule

Pre-Proposal Meeting	10/2/2018 at 3:00 PM
Questions Deadline	10/9/2018
Final Addendum	10/16/2018
Proposal Due	10/23/2018 by 3:00 PM
Notification of Finalists	10/25/2018
Finalist Presentations	10/29/18
Board of Education Approval	12/20/18
Notice to Proceed	1/2/19
Community Engagement	Between 1/23/19 and 2/28/19
Final Report Due	3/1/19

7.0 Project Intent, Goals, & Scope of Services

INTENT

The SDP intends to select a professional firm to conduct a comprehensive demographic study and a proposed attendance boundary/catchment area of Pre-Kindergarten through 8th grade students in a portion of Northeast Philadelphia encompassing the catchment areas of five SDP schools: Joseph H. Brown, Edwin Forrest, Thomas Holme, Mayfair, and Robert B. Pollock. The study should cover the period of the 2013-2014 school year through the 2033-2034 school year (five years previous and fifteen years ahead). The study shall include analyses of live birth and demographic trending, census, real estate sales and development, residents' ages and median incomes, public versus non-public school enrollment, transportation impact, walking distance to New School, geographic hazards including large streets, railroads, highways etc. and other data that would assist with an accurate forecast. The study shall provide the SDP with redistricting options based on demographic distribution, enrollment projections, and population growth.

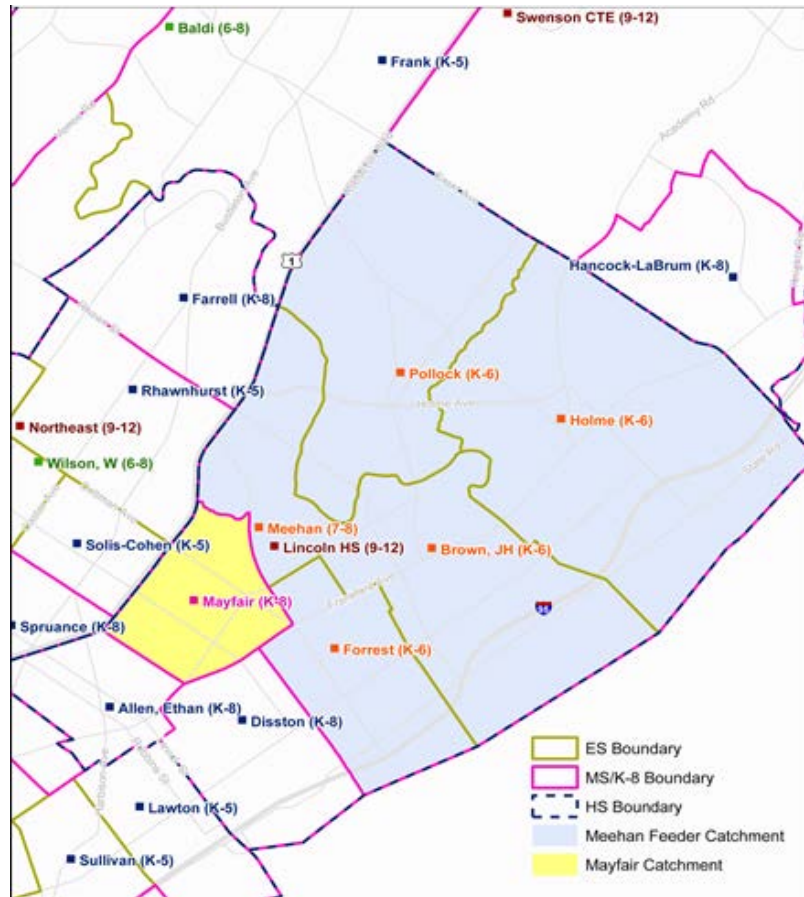
The firm shall conduct public engagement, including graphic presentations and feedback collection, with community and stakeholders. Community engagement shall include multiple levels such as private principals briefing, and stakeholders and community at large engagement.

The following shows the schools that are part of the analysis, along with their building capacity and current enrollment.

School	Grades	Capacity	Enrollment 2018/19*
JH Brown	K-6	517	591
Forrest	K-6	974	1,154
Holme	K-6	795	607
Mayfair	K-8	955	1,859
Pollock	K-6	696	648

* Enrollment represents number of attending students as of 9/7/2018.

The following shows the existing catchment areas of the schools that are part of the analysis:



GOALS

The goals of the SDP in conducting a demographic study are as follows:

1. Define population growth in the last 5 years;
2. Project growth for the region and aforementioned schools for the next 15 years based on trends, migration, live births, and other relevant factors;
3. Create a new catchment area for a new K-8 school that relieves overcrowding at five existing elementary schools: Brown (K-6), Pollock (K-6), Holme (K-6), Forrest (K-6), and Mayfair (K-8);
4. Review space utilization at the five existing elementary schools listed in #3 above, including identifying space deficiencies and future space requirements and assisting with the determination or definition of capacity(ies);
5. Engage the neighboring community or its representatives in the decision-making process including incorporating their feedback in the method used for redistricting and weighting their suggestions into the results;
6. Ensure new boundaries do not adversely impact any specific community and that diversity is maintained in each of the five existing schools as well as the newly created one.

SCOPE OF SERVICES

The project will be managed by a Project Manager from the Office of Capital Programs. SDP stakeholders will be coordinated by a Project Manager from the Office of Family And Community Engagement (FACE) and the Office of Government Relations.

The selected firm shall, at a minimum, hold the following in-person meetings and presentations with the SDP:

1. One project kickoff meeting;
2. Three progress meetings;
3. A minimum of three community engagement sessions;
4. Two final presentations of study findings and recommendations.

The selected firm shall be prepared to submit multiple redistricting options that reflect SDP and community input. This reiterative process requires multiple SDP reviews and SDP and community feedback. Proposer shall be prepared to provide options, collect and incorporate SDP and community comments and feedback throughout the process, resubmit plans, and prepare the final report and redistricting plan that reflects all comments and feedback.

The deliverables shall include a report containing, at a minimum, the following information:

1. Detailed maps throughout the report;
 - a. Maps generated where data can be represented geographically. For example, population concentration, live birth trends, families with student-aged children moving into an area, etc.
 - b. Proposed new districts/ catchment areas.
 - c. Detailed maps of population diversity concentration.
2. Description of trends from 2013-2018;
 - a. Trends should be broken down into reasons. For example, immigration, transitions (school management), transitions (geographic), live births, racial density shifts, residential changes, zoning changes, neighborhood life cycles (new families moving in), financial shifts, higher percentage of students attending, new and planned residential developments, etc.

- b. Description should be accompanied by easy-to-read charts where appropriate.
3. Annual projections through 2034 of population growth including age, median income, and other census data where relevant;
4. Annual projections through 2034 of real estate sales;
 - a. This should include effect on student-aged population.
 - b. Include history and projection of the average number of students per household.
5. Annual projections through 2034 of public and non-public school enrollment, grade by grade;
6. Proposed redistricting of catchment areas based on school capacity with detailed maps, utilizing a Geographic Information Systems (GIS) that visualizes the growth in the area of study and the impacts (transportation, capacity, etc.) on the five existing schools plus the recommended capacity of the new school;
7. Recommendations for grade formation or confirmation of the new school;
8. Review and definition of the capacity of the existing five elementary schools included in this study;
9. Meeting minutes from all meetings, with appendices of presentation material.

Each deliverable listed above, where applicable, needs to be evaluated and reported by the following demographic areas:

- Geographic building blocks - smaller geographic areas that, when combined, can be rolled up into catchments, census designations, zip codes, etc. These geographic areas will be used for scenario-building for new or adjusted catchments by moving them from one school or another. These geographic areas should keep neighborhoods together, but try to be similar in size and/or number of students.
- Elementary school catchments.
- The entire area as a whole.

Additionally, each deliverable listed above, where applicable, needs to be evaluated and reported by the individual grades (PK-12) as well as the following demographic breakdowns:

- Students living in geographic area attending District managed schools: neighborhood in-catchment, neighborhood out-of-catchment, special admit, or alt ed.
- Students living in geographic area attending Renaissance Charter schools.
- Students living in geographic area attending Traditional Charter schools.
- Students living in geographic area attending non-public schools.
- Students attending the schools being evaluated, including the proposed school.

SDP will provide the following data relevant to the target area, from the 2012-2013 school year through the present. Additional data not listed below will be provided if available, upon request. **Data provided by SDP shall not be shared with anyone outside of SDP, nor shall the data be used for any purpose other than the work specified herein, without prior written authorization.**

1. Individual student data for all students living in the catchment area(s) and/or attending the school(s). Data includes address, grade, race, gender, attending school, catchment in which they live, neighborhood school, In/Out boundary status and Special Education status.
2. School enrollment history, per grade.
3. List of school programs for District, Renaissance and Charter schools. Data includes ID, name, address, grades served / level, and program type (CTE, neighborhood, etc.).

4. Building capacities and space inventories including ID, name, address, capacity, and program(s) in building. Space inventory to be confirmed by selected firm.
5. Feeder patterns.
6. Spatial Data for #s 1, 3, 4, and 5 including spatial catchment zones for each year from the 2012-2013 to the present.

8.0 Proposal Requirements

7.1 Technical Proposal Requirements

Technical Proposals shall provide the following required information. Organize the proposal to provide section tabs as noted.

Introduction (no tab required)

1. Provide a cover letter explaining the Proposer's understanding of the Scope of Services and a narrative as to why it is qualified to undertake the services described herein. The cover letter shall be signed by an individual authorized to contractually bind the proposal.
2. Provide a Table of Contents.

Tab 1 – Project Experience

1. Describe completed studies of comparable type, scope and complexity that demonstrate the ability of the Proposer to successfully complete the project.
2. Provide a sample demographic report.

Tab 2 – Project Organization and Personnel Qualifications

1. Provide an organizational chart of the firm making the proposal. The chart should include all key personnel, their titles and roles in the project.
2. Provide resumes of all key personnel. Resumes shall include but not be limited to:
 - a. Experience on projects of similar size, scope and complexity;
 - b. Professional certifications and technical expertise;
 - c. Three (3) references including current telephone numbers and email addresses for persons with whom they have had professional dealings within the last three years.

Tab 3 – Project Approach

1. Describe how your firm would approach the demographic study.
2. Provide a Community Outreach and Engagement Plan which draws upon best practices. The plan should reflect your means of reaching the community at large, your communications to a diverse community with different spoken languages, and approach to explaining data driven plans to a community who may not be well versed in the subject.
3. Provide a list of the enrollment, demographic, and census information to be included as part of the projections and forecasts. Specify if the information will be provided on a region-wide and/or individual school basis.
4. Provide the process used to prepare the study, including models and methodologies for preparing projections and forecasts.
5. Provide a format of the report presentation (narrative, chart, graphics). Deliverables shall include a PowerPoint presentation suitable for use in meetings with stakeholder groups as well as posting to the SDP website.
6. Describe how you would propose to use SDP personnel to assist you during the study and indicate the approximate time requirement.

7. Provide a list of all information the SDP will need to provide. Note if a specific format for providing the information will be required as well as the timeframe for providing information.
8. Provide any additional information about how the firm would approach the demographic study and attendance boundary that would be helpful to the committee's evaluation.

Tab 4 – Project Schedule and Plan

Provide a timeline for required meetings and presentations, deadlines for receiving pertinent information from SDP, and delivery of final report. Report due no later than March 1, 2019.

Tab 5 – Proof of Current Insurance Coverages

Provide Certificate(s) of Insurance reflecting current insurance coverage of the Proposer's firm for the following:

1. Workers' Compensation and Employers' Liability Insurance
2. Commercial General Liability Insurance
3. Automobile Liability Insurance
4. Professional Liability Insurance
5. Excess Umbrella Insurance

Proposer must provide evidence of current insurance coverage prior to execution of the contract. The amounts and types of such insurance coverages are indicated in the Sample Contract (see Exhibit "A").

Tab 6 – Good Standing or Subsistence Certificate

All Proposers must submit a copy of their firm's Good Standing or Subsistence Certificate issued by the Pennsylvania Department of State, Corporation Bureau. Certificates may be ordered online or by calling (717) 787-1057. Proposers may have to register their companies before ordering.

Tab 7 – Completed Executed Forms & Attachments

- o Agreement to Contract Terms and Conditions

The Proposer shall review the sample contract in Attachment "A" and complete the form acknowledging that they are in agreement and no changes will be made to the Contract.

- o City of Philadelphia Tax Compliance

Provide a copy of the Proposer's "Certificate of Tax Clearance" with the City of Philadelphia. Search for the firm's tax compliance status at this link:

<https://secure.phila.gov/revenue/TaxCompliance>. If the firm is compliant, print and attach the certificate. If the firm is not compliant, please contact the City Revenue Department Tax Clearance Unit at (215) 686-6565.

- o Anti-Discrimination Policy & Equal Opportunity Non-Discrimination Notice
– See Attachment "B"

The Proposer must sign the form acknowledging and agreeing to adhere to the District's Anti-Discrimination Policy.

- o M/WBE Participation Plan Form - See Attachment "C"

The Proposer must complete the M/WBE Participation Plan form. Respondent to this RFP will include 10-15% sub-consultant participation with either a minority-owned business enterprise(s) and/or with a woman-owned business enterprise(s).

Tab 8 – Acknowledgment of Receipt of Addenda (if any)

The Proposer will acknowledge and list the number of addenda received.

Tab 9 – Company’s Financial Statements

The Proposer must submit the firm’s most recent audited financial statement, which shall include, at a minimum, a balance sheet, related statements of income and retained earnings and cash flows and footnotes.

7.2 Fee Proposal Requirements

1. Fee proposal shall include hourly rate for each team member and the number of hours anticipated.
2. The cost proposal must be an all-inclusive amount for the full range of services required under the contract. No additional billing will be allowed for participant materials, document printing, or other incidentals.
3. SDP may reimburse for travel and parking.
4. Proposer may include in its proposal items not specified in this RFP, which it would consider pertinent to the scope of services.

9.0 Selection Procedure & Evaluation Criteria

A responsive proposal is one that completes and addresses all the requirements of the RFP. Each proposal will be reviewed by the SDP selection committee to determine responsiveness. Proposals deemed non-responsive will be rejected without evaluation. The SDP reserves the right to reject any or all proposals when such rejection is in the best interest of the SDP. The SDP reserves the right to waive any informalities and technicalities in the RFP process or any non-material defects in proposals. The SDP may at any time terminate the RFP process provided for herein for any reason or no reason at the sole discretion of the SDP. The receipt of proposals or other documents by proposers during any state of the RFP process shall in no way obligate the SDP to enter into any agreement with any proposer or make the SDP liable for any proposer costs. The SDP may alter these and any other procedures as it deems necessary and appropriate.

If for any reason whatsoever the SDP rejects any proposer’s proposal, the proposer agrees that it will not seek to recover lost profits on work not performed nor will it seek to recover its proposal preparation costs. By submitting its proposal, the proposer expressly states that it intends to be legally bound and accepts the limitation of remedies set forth in this paragraph. By submitting its proposal, the proposer further expressly states that should it file, initiate, or persuade another to file, initiate or in any other manner pursue or encourage any lawsuit or that such filing, initiating, or other pursuit constitutes a breach of its agreement with the SDP and that it will be liable for damages incurred by the SDP arising from the breach of this agreement including, but not limited to, the SDP’s attorneys’ fees and costs of defending such action.

Selection - Stage 1:

Proposals shall be evaluated by a selection committee. Each member of the selection committee will assign a score to the proposal based on the following evaluation criteria:

- A. Technical competence and qualifications of the Proposer’s firm as evidenced by professional experience in the satisfactory performance of demographic studies for urban school districts of comparable size, building types and complexity;
- B. Technical competence and qualifications of the assigned personnel as evidenced by the education and experience of key team members in providing the services described herein;
- C. Project approach including preliminary redistricting concepts and schedule control;

- D. The quality of references from past or current clients, preferably projects of comparable type, size, and complexity to the project described herein;
- E. History of Proposer in successfully meeting schedules and succeeding in community engagement which resulted in a favorable redistricting plan;
- F. Meeting of M/WBE goals required in Attachment C.

Each Proposer's firm will receive a ranking based on the selection committee's scores. A limited number of firms (to be determined by the SDP) with the highest-rated technical proposals will be selected as finalists and invited to make a presentation to the selection committee. **Proposers must be prepared to make a presentation on the date noted in Section 5.0.** Project managers and key personnel are expected to attend the presentations. The finalists shall be prepared to present and respond to questions on preliminary redistricting approach, unique qualifications of the Proposer's firm, cohesiveness of proposed team, and approach to schedule and quality control. The selection committee will once again evaluate each firm using a pre-established scoring rubric.

Selection - Stage 2:

The fee proposal of the highest-rated firm will be opened and the SDP will enter into fee negotiations. (Fee proposals for the other firms will not be opened until such time as the firm in question has been selected for fee negotiation.)

If the SDP cannot reach an agreement on fee with that firm, negotiations with that firm shall be terminated. The fee proposal of the next highest rated firm will be opened and fee negotiations with that firm commenced.

The process will be repeated as necessary until agreement is reached or the SDP elects to terminate this solicitation.

Notification of Award

Selected Proposer(s) shall be approved by the Board of Education, after which the SDP will notify the successful Proposer(s) of the award, prepare and distribute the necessary documents for execution. The unsuccessful Proposers will be notified by letter after the awarding of the contract.

ATTACHMENT A
SAMPLE PROFESSIONAL DESIGN SERVICES CONTRACT

The “Professional Services Contract” shall serve as a “sample” document for the Proposer(s) to review. Said “sample” contract shall not be construed as a contract between the Proposer and the SDP. The “sample” contract is posted under the heading for this RFP at the following link:

<https://www.philasd.org/capitalprograms/programsservices/contracts/current-rfps-requests-for-proposals/>

I have read the sample “*Professional Services Contract*” and agree to enter into a Contract for this Project under the Terms and Conditions of the Contract and will not take any exceptions to the Terms and Conditions.

Proposer’s Firm Name: _____

Corporate Seal: Affix Here

Signature: _____ (Principal / Owner)

Title: _____

Date: _____

ATTACHMENT B
ANTI-DISCRIMINATION POLICY
of the
SCHOOL DISTRICT OF PHILADELPHIA
ADOPTED NOVEMBER 14, 2007

SECTION 1. THE POLICY

It is the policy of the School District of Philadelphia (the "District") acting through and by the School Reform Commission (the "SRC") to ensure equal opportunity in all contracts let by the District (the "Contracts"). In light of this policy, the District has adopted this Anti-discrimination Policy (the "Policy") which is applicable to all Contracts, including but not limited to, Contracts for the design, development, construction, operation and maintenance of school buildings and other buildings and structures owned, leased or used by the District or its contractors, assignees, lessees and licensees (the "Facilities"); Contracts for professional services and Contracts for the purchase of goods, services, supplies and equipment for the District and the Facilities. The objective of the Policy is the promotion of prime contract and subcontract opportunities for minority and woman-owned business enterprises ("M/W/BEs") that are approved by the District or that are certified by the Minority Business Enterprise Council of the City of Philadelphia, Southeastern Pennsylvania Transportation Authority or any other certifying agency designated by the District in its discretion.

The fundamental requirement of the Policy is that all contractors, vendors and consultants that contract with the District (the "Contractors"), satisfy the District that they will: (1) not discriminate against any person in regard to race, color, religion, age, national origin, sex, ancestry, handicap or disability; and (ii) provide a full and fair opportunity for the participation of M/W/BEs in Contracts. Contractors must demonstrate that the participation of M/W/BEs is "meaningful and substantial" in all phases of a Contract under criteria adopted by the District. "Meaningful and substantial" shall be interpreted by the District as meaning the range of participation that reflects the availability of bona fide M/W/BEs in the Philadelphia Metropolitan Statistical Area. Participation shall be measured in terms of the actual dollars received by M/W/BEs.

As used in this Policy, the word "Contractors" includes any person, firm, partnership, non-profit corporation, for-profit corporation, Limited Liability Company or other legal entity that contracts with the District.

For purposes of this policy, "minority person" refers to the following: African American or Black (persons having origins in any of the Black racial groups of Africa); Hispanic American (persons of Mexican, Puerto Rican, Cuban, Dominican, Central or South American, or other Spanish or Portuguese culture or origin regardless of race); Asian American (persons having origins from Japan, China, Taiwan, Korea, Burma (Myanmar), Vietnam, Laos, Cambodia (Kampuchea), Thailand, Malaysia, Indonesia, the Philippines, Brunei, Samoa, Guam, the U.S. Trust Territories of the Pacific Islands (Republic of Palau), the Commonwealth of the Northern Marianas Islands, Macao, Fiji, Tonga, Kiribati, Juvalu, Nauru, Federated States of Micronesia, Hong Kong, India, Pakistan, Bangladesh, Bhutan, the Maldives Islands, Nepal or Sri Lanka); and Native Americans (which includes persons who are American Indians, Eskimos, Aleuts or Native Hawaiians).

SECTION 2. PROCEDURES FOR IMPLEMENTATION

1. Articulation of the Policy. Staffing and Reporting

The Office of General Counsel and Office of Small Business Development will develop language to be included in bid solicitations and requests for proposals that clearly sets forth the objective of the Policy (the "Solicitation

Language"). District employees shall include the Solicitation Language in all bids, public solicitations, requests for proposals and all communications to potential Contractors, including those who wish to provide professional services to the District. The Policy shall be articulated to the public in general, and to each Contractor, assignee, lessee or licensee doing or seeking to do business with the District. The District may employ additional staff or contract with other public or private entities to assist in the implementation of the Policy. SBD shall provide the SRC with annual reports on the level of M/W/BE participation in all contracting activities.

2. Promotion of M/W/BEs

The District recognizes the importance of having meaningful and substantial M/W/BE participation in all Contracts. To that end, the District will take steps to ensure that M/W/BEs are afforded a fair and equal opportunity to participate. Those steps may include but are not limited to: (i) making public contracting opportunities; (ii) advertising in newspapers and periodicals published by community-based organizations and M/W/BEs; and (iii) designing bid packages in such a way as to promote rather than discourage M/W/BE participation.

3. Contracting Requirements

a. *Bids, Request for Proposals, and Public Solicitations*

Prior to the dissemination of any bid, request for proposals or public solicitation (the "Solicitation"), the applicable contracting department of the District shall submit proposed ranges of M/W/BE participation in the area to be bid (the "Participation Range") to SBD for approval. The Participation Range, as approved by SBD, shall be included in each Solicitation and, if applicable, the Solicitation shall include the names and addresses of bona fide M/W/BEs that are available for contracting or joint-venture opportunities. Each bidder or respondent shall be required to submit: (i) a plan with its bid or proposal that meets the Participation Range set forth in the Solicitation and lists the names, addresses, dollar amounts and scope of work to be performed by M/W/BEs (the "Participation Plan"); or (ii) brief narrative explaining its reasons for not submitting a Plan that meets the Participation Range set forth in the Solicitation. Submission of the Participation Plan is an element of responsiveness. Failure to submit a completed Participation Plan or a narrative explaining the reasons that the Participation Ranges could not be met may result in the rejection of a bid or proposal. If the Participation Range in a bid or proposal meets or exceeds the level determined by the District to be meaningful and substantial, there shall be a presumption of compliance with the Policy. If, however, the proposed Participation Range falls below the level determined by the District to be meaningful and substantial, the bidder or respondent must prove to the satisfaction of the District that it did not discriminate in the solicitation of potential subcontractors and/or joint venture partners.

b. *Contracts for Professional Services*

Contracts for professional services that are not the subject of a Solicitation must also include approval Participation Plans. If a proposed Contract for professional services is subject to the approval of the Limited Contracts Authority Committee of the District (the "LCA"), the applicable contracting department shall submit a proposed Participation Plan for the written approval of SBD prior to the submission of the Contract to the LCA. In instances where proposed Contract for professional services must be approved by a Resolution adopted by the SRC, SBD's approval of the Participation Plan shall be incorporated into the on-line resolution process prior to the submission of Resolution to the SRC.

4. Sanctions

The Participation Plan shall be a part of each Contract between the District and a Contractor and shall be enforceable as any other contractual term or condition. Sanctions for breach of a Participation Plan may include suspension, cancellation of the Contract and/or disbarment from future contracting opportunities with the District.

EQUAL OPPORTUNITY

A. EQUAL OPPORTUNITY

The School District of Philadelphia (the "School District") is an Equal Opportunity Employer and demands no less of the companies with which it does business. The School District will not do business with companies or persons who unlawfully discriminate on the basis of race, color, national origin, sex, creed, disability, or any other impermissible ground in their hiring, promotion, subcontracting or procurement practices. By submitting any proposal to contract or entering into any contract with the School District, the Respondent (the "Respondent") represents and certifies that Respondent is an Equal Opportunity Employer; and conducts business affairs without improper regard to race, color, national origin, sex, creed, or disability, and has not been debarred, suspended, or declared ineligible to contract by any public or private agency or entity because of the Respondent's discriminatory practices. If the Respondent has been debarred or suspended, Respondent must submit a statement with the bid identifying the debarring or suspending entity and giving the date that the debarment or suspension was or is scheduled to be lifted. All certifications contained in a Respondent's proposal are material representations of fact upon which reliance will be placed if the School District awards a contract pursuant to this Request for Proposals. If it is later discovered or determined that the Respondent knowingly rendered an erroneous certification, then the School District may pursue available remedies, including termination of the contract.

B. NON-DISCRIMINATION

1. Non-Discrimination in Hiring

The Respondent agrees that it will comply with provisions of the Philadelphia Fair Practices Ordinance administered by the Human Relations Commission of the City of Philadelphia, the Pennsylvania Human Relations Act, No. 222, October 27, 1955, as amended, 43 P.S. Section 951 et seq; Title 7 of the Civil Rights Act of 1964, 42 U.S.C. Section 2000 et seq., and all pertinent regulations adopted pursuant to the foregoing in providing equal employment opportunities in connection with all work performed by it pursuant to any contract awarded to Respondent, (the "Contract"). The Respondent therefore agrees:

- (a) That it will not discriminate nor permit discrimination by its agents, servants or employees against any employee or applicant for employment with regard to hiring, tenure or employment, promotion, or any other terms, conditions or privileges of employment because of race, color, sex, religion, age, national origin, sex, ancestry, handicap or disability and will move aggressively as is hereinafter set forth to prevent same.
 - (i) In all publications or advertisements for employees to work at the job site covered by the Contract placed by or on behalf of the Respondent, the Respondent will state that all qualified applicants will receive consideration for employment without regard to race, color, religion, age, national origin, sex, ancestry, handicap or disability.
 - (ii) The Respondent will notify each labor union or workers' representative from whom it seeks workers of the Respondent's commitment as set forth in its proposal, and request that each union or workers' representative include minority group members and women among its referrals.
 - (iii) The Respondent will hire minority and female workers for the skilled and unskilled jobs required to perform the Contract in proportion to their availability in the relevant labor pools in the Philadelphia Metropolitan Statistical Area, or to their availability in its qualified applicant pool, whichever is greater.
 - (iv) The Respondent will post in conspicuous places available to its employees and to applicants for employment, a notice of fair practices to be provided by the Philadelphia Human Relations Commission.

- (v) The Respondent will maintain a work environment free of harassment, intimidation and coercion, and will ensure that all on-site supervisory personnel are aware of and carry out Respondent's obligation to maintain such a working environment.
- (b) That it will identify on each certified payroll form submitted to the School District those of its employees who are minority group members and those who are female. As used here, "minority" means African American, Hispanic, Asian, or Native American. The School District shall at all times have access to work site and to the Respondent's employment records to assure compliance with this subsection.
- (c) That it will maintain on forms to be supplied by the School District, the name, race, sex, national origin, skill or craft, address, telephone number, and source of referral of each applicant for employment, which record shall show which applicants were hired.
- (d) (That in the event apprentices are hired in any skilled craft area, the Respondent will endeavor to hire equal numbers of culturally diverse male and female trainees in each skill area.

2. Non-Discrimination in Contracting

It is the policy of the School District of Philadelphia, that business concerns owned and controlled by minority group members and women shall have full and fair opportunity to participate in performance of contracts let by the School District. A Respondent's plan to joint venture with or subcontract to minority and woman-owned firms (M/WBEs) and/or to utilize M/WBEs as sources of supplies, equipment, or services will be a significant part of the evaluation of the Respondent's responsibility.

- (a) The Respondent will consider all proposals from potential M/WBE firms and document on the forms supplied by the School District, the reasons for not entering into a joint venture or subcontract with a M/WBE.
- (b) **Respondent to this RFP shall employ the services of Sub-consultant(s), as necessary, to achieve combined Minority Owned Business Enterprise (MBE) and Woman Owned Business Enterprise (WBE) participation goals in a range of 10%-15% of the total amount of services provided. If the Firm is a MBE or WBE firm, then the Firm will have achieved the goal for that category. A non-MBE or WBE firm shall employ a MBE or WBE firm to achieve these goals.**
- (c) The Respondent's agreement to meet the requirements of the Section is a material representation of fact upon which reliance will be placed if a contract is awarded. If it is later determined that the Respondent has not made a good faith effort to comply, within the School District's sole judgment, the School District may pursue available remedies, including suspension or debarment of the Respondent from future School District work as non-responsible.

3. Liability of Subcontractors

Any subcontractor of the Respondent shall have the same responsibilities and obligations as the Respondent to comply with the provisions of this Section and shall be subject to the same penalties for failure to comply as set forth below.

4. Penalties for Failure to Comply

It is hereby agreed that failure to comply and demonstrate a good faith effort to comply with the foregoing requirements shall constitute a substantial breach of the Contract.

Please sign below acknowledging and agreeing to comply with the Anti-Discrimination Policy of the School District of Philadelphia.

_____ (seal)
(Trade Name of Firm)

_____ (seal)
(Signature of Owner or Partner)

(Date)

ATTACHMENT D

FEE PROPOSAL

Please acknowledge the following by signing where indicated below.

Method of Compensation

The cost proposal must be an all-inclusive amount for the full range of services required under the contract. No additional billing will be allowed for travel expenses, parking, participant materials, document printing, or other incidentals.

Proposed Fee: \$ _____

Project Team Personnel List with Hourly Rates

The listing must include the hourly billable, all-inclusive wage rates for all people listed as project team personnel. These hourly rates shall be fully loaded including benefits, overhead and profit. **Please provide only one wage rate per position; do not use ranges. If ranges are used, the lower rate will be used for evaluation.**

Name & Company	Position	Hourly Rate
		\$
		\$
		\$
		\$
		\$
		\$
		\$

(Trade Name of Firm)

(Signature of Owner or Partner)