Ms. Caitlynn Peetz  
Caitlynn.peetz@bethesdamagazine.com

Dear Ms. Peetz:

I have received your Maryland Public Information Act request (MPIA) seeking a copy of the proposals submitted to Montgomery County Public Schools (MCPS) for the Request for Proposal (RFP) No. 4886.1, Comprehensive Analysis of School and Cluster Boundaries.

I am responding on behalf of the superintendent of schools who, as official custodian of records for the school system, is responsible for replies under the Maryland Public Information Act, Title 4 of the General Provisions (GP) Article.

Enclosed are documents in partial response to your request. Documents have been redacted in accordance with GP § 4-337, the “Records Containing Investigatory Procurement Information” exemption, as well as GP § 4-335, the “Trade Secrets: Confidential Business and Financial Information” exemption. Further, WXY Architecture + Urban Design has had an opportunity to review and redact the documents originating from their offices for any proprietary and confidential information.

In addition to WXY Architecture + Urban Design, we are gathering and preparing for disclosure documents from Cooperative Strategies, the other vendor that submitted a proposal for RFP No. 4886.1. Pursuant to GP § 4-206(e), MCPS has waived the cost that may be accrued in the production of this request.

Pursuant to Maryland Code Ann., Gen. Provis. § 4-203 (2015), this letter serves to notify you that it will take longer than 10 working days to fulfill the remainder of this request. This delay is due to the amount of time it will take to look for the information you have requested, gather any responsive documents, and prepare them for disclosure.

I anticipate that the information will be prepared within the 30-day timeframe for production.

With regards,

Derek G. Turner  
Chief Communications Officer

DGT:vem

Enclosures

Copy to:  
Dr. Zuckerman  
Mr. Civin
0.0 Executive Summary
  0.1 Team Profile
  0.2 Team Structure
Montgomery County Public Schools (MCPS) has already taken several steps to adapt its educational facility planning and capital budget processes to the County’s changing demographics and land use environment. These proactive measures have resulted in some of the highest educational attainment rates in the United States. However, over the course of the last decade, MCPS has seen an increase in enrollment due to shifting demographic trends. This demographic growth has presented challenges to maintaining an equitable school system. Additionally, as highlighted by the most recent enrollment projections, Montgomery County expects a steady increase in the public-school enrollment by 2027, with much of the growth happening between 2019 and 2024. The total projected MCPS enrollment is supposed to increase 6.9%, from 163,123 students in 2018 to 174,322 by 2024 – a significant increase in student population when compared to other counties in Maryland.

Considering the constant shifts in population owing to domestic, foreign and in-state migration, it becomes imperative for MCPS to re-evaluate and comprehensively understand school cluster boundaries for student assignment. Given the range of issues that need to be addressed, this process can present complications. Consultant, along with our project partners, is uniquely positioned to undertake and untangle these complex tasks through a rigorous approach that combines data analysis, transportation analysis and creative community engagement strategies. Collectively, our team brings strong experience and significant capacity that enables us to comprehensively look at extant school clusters and understand what cluster adjustments will further the four pillars as outlined under Policy FAA. We also bring the unique ability to leverage our in-house scenario tools to quickly test boundary scenarios and accurately predict the impacts on the topics of capacity and accessibility. Such a process will use a Key Performance Indicator (KPI) based approach that will complement Policy FAA objectives, MCPS’s comprehensive facility assessment and Key Facility Indicator (KFI).

Furthermore, our team will work closely with MCPS staff, Board of Education and the Superintendent to ensure that clear and actionable strategies are developed at the end of the process. With consideration of MCPS’s unique conditions, this project will seek to achieve the following goals:

• **Understand challenges and opportunities** of current boundaries through rigorous data and statistical analysis
• **Solicit feedback from community** at-large, select stakeholders, Board of Education and MCPS senior leadership through innovative engagement strategies
• **Identify key performance indicators (KPIs)** with MCPS staff that furthers Policy FAA goals
• **Recommend cluster boundaries realignments** to balance student population proportionately at elementary, middle and high schools based on optimum capacity range as identify by MCPS.
• **Comprehensively understand trade-offs** associated with cluster boundary changes on topics such as facility utilization, student body demographics, transportation patterns, geographic proximity and feeder pattern articulation.

Consultant will work closely with MCPS on the approach developed through this process and will execute the outlined tasks over a period of approximately 10 months.
Population Growth 2015-2040

MCPS School Clusters
Percent Change in Population
- 1% - 5%
- 5.1% - 14%
- 14.1% - 27%
- 27.1% - 47%
- Middle Schools
- High Schools
- Elementary Schools

CLUSTER DETERMINATION CRITERIA
- School Capacity and Enrollment
- Natural Boundaries or Physical Barriers
- Neighborhood Population
- Anticipated Growth within the District
- Student Proximity to Schools and bus/travel time
- Siblings enrollment at schools
- Census tract and geo-code data
- Existing student feeder patterns
- Capital Expenditure Plan
- Race, ethnicity, socio-economic status

SCHOOL ASSIGNMENT MECHANISM

Comprehensive Choice System: Families are not assigned to a default school and can apply to any school in the district

Limited or Controlled Choice System: Students have a default school but can opt out through an application or other process.

Boston Mechanism

Gale-Shapley SOM

Top Trading Cycles (TTC)

Random Priority Mechanism

Random Priority Mechanism

First Preference Mechanism
We are WXY. We plan. We design. We build.

WXY is a multi-disciplinary practice. We are planners, data analysts, policymakers, strategists, urban designers, architects, thinkers, and strategists. No matter the size, we tackle problems and find solutions. We work to understand a context, and plan with community in mind. We challenge ourselves to face the array of complex problems and commit to solutions that support a healthy and sustainable future.

We work at all scales. Our approach combines the power of analytics with community intelligence to derive solutions that promote both physical and economic wellness for the entire community.

We work at all scales. Whether designing engaging public plazas and parks, intergenerational community centers or large-scale, affordable housing complexes, our approach combines the power of analytics with community intelligence to derive solutions leverages contributions of public and private partners to create spaces that promote both physical and economic wellness for the entire community.

WXY has led several school policy, research, and planning projects including the D15 Diversity Plan, NYC DOE Equitable Admissions Study, the Community School District 1 study on Assignment Policy Effects, the Boston Public Schools Assignment Policy Development and Geospatial Analysis, and the New Rochelle School Capacity Study. We are also currently working in Lancaster, PA on a school boundary and re-districting plan. Through these projects our team has demonstrated a sound understanding of the core components of a school planning process and the cumulative impacts associated with a re-districting process.

Just as important for this effort is our expertise in the area of community planning, outreach and consensus building, as demonstrated in the D15 Diversity Plan, East Harlem Neighborhood Plan, the Westchester County Community Design Institutes, the QueensWay Plan, and the Cleveland Museum of Art Engagement Plan. WXY views facilitation and engagement as an important step in a longer process of establishing new policy or physical designs that will shape our neighborhoods and cities. On a basic level, facilitation enables a shared learning process that can lead to well-designed spaces and policies. Through the various iterations, WXY has developed a strong core set of engagement principles the define our general approach:

- Translate Trends and Needs into Community Design Information
- Identify Indicators of Potential Impacts and Opportunities
- Create a Safe Working Space to Facilitate New Ideas
- Establish Clear Procedures for Decision-making
- Create Inclusive Public Meetings through Key Local Partners
- Discuss Local Concerns without Anticipating Solutions
- Generate Local Ownership of Recommendations

WXY is a WBE-certified firm founded by architects Claire Weisz, FAIA, and Mark Yoes, FAIA. In 2006, they were joined by Layng Pew, AIA, and in 2011, Adam Lubinsky, PhD, AICP. Today, the studio numbers over 50 people including professionals with backgrounds in architecture, planning, engineering, economic development and housing policy.
Recent Awards and Fellowships

- Fast Company, World’s Most Innovative Companies, Architecture, 2019
- Architects Newspaper Best of Design, Unbuilt Urban Projects - Honorable Mention: Brooklyn Navy Yard Master Plan, 2018
- AIA New York State, Award of Merit: SeaGlass Carousel, 2018
- APA NYM Chapter, Lawrence M. Orton Award: D15 Diversity Plan, 2018
- APA NYM Chapter, William H. Whyte Award: La Marqueta Concept Plan, 2018
- AIANY + ASLANY: Design Excellence Honor Award for Planning: The QueensWay, 2018
- AIA-National Award for Architecture M 1/2/5 Sanitation Garage & Salt Shed, 2018
- APA-National Award, Rockaway Boardwalks Reconstruction, 2018
- SARA-New York, New York State Parks Cabins, 2018
- New Jersey Future Smart Growth Award, Kearny Point, 2017
- AIA COTE Award, M 1/2/5 Sanitation Garage & Salt Shed, 2017
- AIA New York State Firm of the Year, 2016
- Urban Design Merit Award, AIANY, The QueensWay Plan, 2015
- Spirit of ABNY Award, Association for a Better New York, The QueensWay Plan, 2015
- Citation for Urban Planning/Design, AIA New York State, The Brooklyn Strand, 2015

Selected Client List

- NYC Department of Education
- Boston Public School System
- City of New Rochelle
- Medgar Evers College
- Cornell University
- Amber Charter School
- REED Academy
- Bronx Charter School for the Arts
- NYC Department of Parks and Recreation
- Downtown Brooklyn Partnership
- NYC Department of City Planning
- Brooklyn Navy Yard
- NYC Economic Development Corporation
- NYC Department of Design and Construction
- US Department of Housing and Urban Development
- NYC Housing Authority
- New York State Energy Research and Development Authority

Recent Project Experience

- D15 Diversity Plan, 2018
- Lancaster School District School Boundary & Redistricting Plan, Ongoing
- Anable Basin Special District, 2018
- La Marqueta Concept Plan, 2018
- Tarrytown Comprehensive Plan, 2018
- Brooklyn Navy Yard Master Plan, 2018
- New York Stock Exchange District Plan, 2018
- The Peninsula Live Work Campus, ongoing
- Rockaway Conceptual Masterplan & Boardwalk Reconstruction, 2017
- Reconstruction of Astor Place and Cooper Square, 2016
- DSNY Manhattan Districts 1/2/5 Garage and Salt Shed, 2015
- Brooklyn Strand Action Plan, 2015

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ABOUT US

TransPar Group of Companies (TPG) is the most experienced consultancy dedicated exclusively to the design, management and operation of school transportation programs. Whether client objective are to assess performance and improve efficiency, better understand operations or fix specific weaknesses, we assist with the development and implementation of a professional and modern school transportation program.

HOW WE HELP

We simplify the complexities of school transportation operations by clarifying and outlining the effect of policies, boundary alignment, costs, bus routing and technology on transportation performance. This allows our clients to keep the focus on student performance in the classroom. Whether our clients simply require clarity or are ready to make a substantial change that requires focused expertise, our array of experienced analysts and transportation industry professionals are ready to assist.

TRENDING PROJECTS

▪ Bell Time Alignments & Route Building
▪ Boundary Analysis
▪ Contract Management
▪ Service Quality Assessment
▪ Driver Shortage Assessment
▪ Fleet Maintenance, Rightsizing, & Replacement Assessment
▪ Operational Efficiency & Effectiveness Review
▪ Policy/Procedure Assessment & Development
▪ Customized Transportation Solutions
PUBLIC ENGAGEMENT ASSOCIATES

Special ProjX LLC d/b/a Public Engagement Associates (PEA) is a Washington, DC based consulting group dedicated to helping those who want to effectively engage citizens on important issues that impact their lives. It is led by three principals—Steve Brigham, Theo Brown and Kim Sescoe—who each have more than 18 years of experience leading prominent public engagement efforts in the Washington, DC area initially with AmericaSpeaks and now with Public Engagement Associates.

PEA has helped to produce large scale efforts involving hundreds of citizens as well as smaller public engagement projects that seek to engage a select number of citizens or stakeholders in meaningful ways. Some of the community outreach and engagement projects our team has managed in the Washington, DC region during the past four years include:

- Large citizens and stakeholder meetings to develop a multi-jurisdictional community compact for the development of Metro’s Purple Line
- Public hearings and Open Houses for the State Department to get input on the Environmental Impact Statement for the Foreign Mission Center to be located at the former Walter Reed site
- Meetings of 100+ parents in D.C.’s Ward 8 and Baltimore’s Parkside neighborhood to give input on the needs of families with children aged 0-8
- An economic development summit in Ward 7 hosted by DC Mayor Vincent Gray
- A charrette process involving more than 100 residents and stakeholders in Prince George’s Plaza to promote transit-oriented development in one of the county’s future downtown areas.
- A series of public meetings in Historic Ellicott City, MD to focus on recovery and rebuilding in the aftermath of a massive flood in July 2016
- Provided program design, interactive technology, and town meeting facilitation to gather community input into the specifics of a new community education model to improve schools, and enhance the lives of youth in Flint, Michigan.

We bring together highly skilled consultants to help clients quickly discern the purpose and outcomes, then partner with the client to design highly interactive meetings that achieve those outcomes. We believe this team brings a depth of experience, skill, and savvy in the facilitation and mediation realm that is hard to match anywhere, whether locally or nationally.
Adam Lubinsky is a Managing Principal at WXY, with more than 15 years of experience leading large-scale master plans, strategic visioning projects, and driving innovation in mobility for public and private sector clients, including extensive work for and coordination with municipalities and city agencies, community development corporations, cultural institutions, and private developers.

In recent years, Adam has undertaken major projects in New York City such as the Brooklyn Tech Triangle Strategic Plan, Brooklyn Navy Yard Master Plan and the Anable Basin Special District while also leading efforts in the wider metro New York region, Boston and Detroit. Adam directs WXY’s research on mobility, including collaboration with New York State Energy Research and Development Authority (NYSERDA) and DOT, with a focus on challenges related to electric vehicle (EV) policy and infrastructure design solutions, freight and carshare.

Adam is an accredited planner (AICP) and a visiting faculty member for Cornell University’s Masters of Urban Planning Program and Parsons New School for Design’s Masters in Urban Ecologies Program. Adam is a Fellow of the Urban Design Forum and was named by Fast Company as one of 2017’s Most Creative People in Business.
Kushan Dave  
Director, Planning

Kushan first joined WXY in 2015 and then again in 2019 as a Planning Director. Kushan has a background in architecture and planning and has used his wide array of skills to develop innovative processes that integrate land use, transportation and economic development to assess impacts of planning and policy decisions. Over the years, Kushan has collaborate with other subject matter experts to provide strategic solutions for capital investment projects in the U.S., Canada, China, India and more recently, Latin America.

At WXY, Kushan provides expertise on complex zoning, land use, transportation, infrastructure, and environmental planning projects. In recent years, Kushan has collaborated on key projects within the metro New York landscape, such as the Anable Basin, Kearny Point Masterplan, The Peninsula and the Downtown Brooklyn Masterplan. In addition, he also leads the business development initiatives in Washington D.C. metro area.

Prior to WXY, Kushan worked with AECOM’s Design, Economics and Planning division in Arlington, VA where he led and contributed to planning and urban design contracts with civic agencies such as WMATA, DDOT, Prince William’s County and Arlington County, VA. He also worked as a project architect and a project manager at Rahul Mehrotra & Associates Architects where he was in charge of planning and architectural projects that addressed the localization of sustainable principals within the zoning framework.

Professional Experience
2019-present: WXY, Planning Director, Washington, D.C.
2012-2013: ModRoof, CoFounder, Ahmedabad, India
2010-2012: Rahul Mehrotra & Associates Architects, Mumbai, India

Select Panel Presentations
• 2019: Digital Gameboards, ESRI GeoDesign Summit
• 2018: Activating Distributed Energy, Energy Days, Penn State University, PA
• 2018: Envision Tomorrow, Georgetown University, D.C.
• 2016: Cities, Places & Technology, Speaker Series, Cornell University, Ithaca, NY
• 2016: Innovation Paradox, New York University, NY
• 2015: NYCHA: Innovative Approach to Planning, Design and Policy, Urban Design Summer Event Series, Columbia University, NY
• 2015: Environmental Threats in Great Lakes Basin, 26th Winter Environmental Conference, Clayton, NY
• 2014: Downtown Ithaca Revitalization, Center for Real Estate & Finance, Cornell University

Select Publications
• 2016: Integrated Strategies to Address Emerging Freight and Delivery Challenges in New York City, NYSERDA
• 2016: North Brooklyn Industrial Innovation Plan, New York City Department of City Planning
• 2015: Shape Your Waterfront: How To Promote Access, Resiliency and Ecology. Waterfront Alliance
• 2014: A New Era of Crude Oil Transport: Risks and Impacts in Great Lakes Basin, Community and Regional Development Institute, Issue #15
• 2010: “Idea of a City : Morphological study of Bhopal, India”, Undergraduate Thesis at Saurashtra University

Education
2015: Cornell University, College of Art, Architecture & Planning, Master of City And Regional Planning
2010: Saurashtra University, Bachelor of Architecture
Traci Sanders
Director, Civic Impact

Traci joined WXY in 2017 with a background in planning, urban policy and research. At WXY, Traci contributes her expertise to a range of projects from community engagement, to architecture, to urban design. Her primary focus is business development, where her goal is to seek projects that demand innovative strategies for creating enriching, dynamic spaces for those who inhabit them, realizing our interest to further environmental sustainability and social equity through both design and planning.

Currently, she is managing the program and design development for a 700-unit, 100% affordable, mixed-use project in The Bronx that requires several discretionary approvals. Additionally, she is conducting research in Chicago on community benefits agreements related to the future development of the Obama Presidential Library. Previous work includes: working with The Cleveland Museum of Art on the implementation of an engagement process that would inform their grounds master plan; conducting city-wide town halls for the NY Department of Education to assess the diversity in schools; and serving as project partner on behalf of the NYC Council Speaker’s Office on the East Harlem Neighborhood Plan.

Prior to joining WXY, Traci was a Policy Associate at the NYU Furman Center, where she worked to disseminate academic research on housing policy to a diverse set of stakeholders, including policymakers, advocates, private sector, and the media. She also worked as project manager on the National Community of Practice on Local Housing Policy, developing guidelines on how to assess and develop effective local housing strategies for cities, counties, and neighborhoods facing strong housing demand.

Professional Experience
2017 – Present: WXY, Director, Civic Impact
2015-2017: NYU Furman Center
2014-2015: New York City Council, Office of the Speaker of the City Council
2011-2014: Kramer Levin Naftalis & Frankel, LLP
2010-2011: The POINT Community Development Corporation

Education
2011: NYU Robert F. Wagner School of Public Service, Master of Urban Planning
2003: University of Chicago, B.A. Political Science
Christopher Rice  
Senior Planner

Christopher joined WXY with a background in resiliency, green infrastructure and community-based planning. He has practiced as a planner at a private architectural firm in New York City, a public space planner at Gehl Studio, and as a land use planner with the New York City Council. At WXY, Christopher leads urban planning and design processes, including the D15 Diversity Plan, the first DOE-initiated community planning process to create racially and socioeconomically integrated middle schools. He is currently managing the School Boundary & Redistricting Plan for the Lancaster School District.

Working at the intersection of social justice and resiliency while at Thread Collective, Christopher worked with NYCHA tenants in Red Hook Houses to develop a comprehensive green infrastructure and open space plan.

Previously at the New York City Council, Christopher’s project work included managing large-scale neighborhood rezonings throughout the city and implementing the most expansive inclusionary housing program to date. There, he served as the project lead for the Jerome Avenue Rezoning and managed ULURP applications for the Bronx Borough.

Christopher received a Masters in City and Regional Planning from the Pratt Institute in 2015. His Masters Thesis, titled “Resilience and Recovery: an Evaluation of Post-Sandy Resiliency Plans and Proposals in Rockaway, Queens,” examined the potential integration of resiliency plans across varying scales to address the peninsula’s most vulnerable populations.

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**Professional Experience**
2018 - present: Senior Planner, WXY
2016 - 2018: Planner, WXY
2015 - 2016: Project Manager, New York City Council, Land Use Division
2015: Project Assistant, Gehl Studio NY
2014 - 2015: Project Assistant, Thread Collective
2013 - 2014: Graduate Research Fellow, Programs for Sustainable Planning and Development, Pratt Institute
2013 - 2014: Research Assistant, New York City Environmental Justice Alliance
2013: Planning Intern, WXY

**Awards & Honors**
- 2016: Urban Design Forum, Forefront Fellow
- 2014: Pratt Center for Community Development, Taconic Fellowship
- 2014: Programs for Sustainable Planning and Development, Pratt Institute, Outstanding Student Award

**Relevant Projects**
- D15 Diversity Plan, NYC DOE, 2018
- Equitable Admissions Study, NYC DOE, 2017

**Poster Presentation**
- 2014: Expanding Coastal Adaptation in New York City: A Framework for Floating Structures and their Co-Benefits, Delta Cities in Times of Climate Change Rotterdam, Netherlands
Cara joined WXY in 2018 with a background in urban planning and a passion for strengthening communities.

She is currently involved in two Downtown Revitalization Initiatives for the State of New York in New Rochelle and Brooklyn. Her previous projects at WXY include: stakeholder engagement strategy for the Cleveland Museum of Art; conducting city-wide town halls for the NY Department of Education to assess the diversity in schools; and a study for the master plan of the new Scoppetta Children’s Center.

Before joining WXY, Cara was a Planner at the Toronto-based design firm BrookMcIlroy, where she planned and designed waterfront master plans, developed city-wide urban design guidelines, conducted transit-oriented development research, and spearheaded indigenous placemaking initiatives in the Toronto region.

Cara received her Masters in Urban Planning from the Harvard University Graduate School of Design in 2016, where she co-founded the biennial Black in Design Conference. Her Masters Thesis, titled “Performing Spatial Justice”, focused on methods of subverting cultural misreading and violent injustices that occur in public space.

**Professional Experience**
- 2016-2017: BrookMcIlroy, Planner
- 2015: PlaceLab + Rebuild Foundation, Doebele Fellow
- 2014-2015: Harvard Health and Place Initiative, Research Assistant

**Conferences and Lectures**
- 2017: New Museum, IdeasCity New York, “Actions for the City by IdeasCity Fellows”
- 2017: “Designing Black Futures,” Boston University Art Galleries, panelist on art and black futurity
- 2016: “Ethical Redevelopment in Chicago,” University of Toronto
- 2016: New Museum, IdeasCity Detroit, Studio Laboratory Fellows Presentation
- 2014: “Panama Canal” A Senior Thesis Exhibition, Princeton University
Raphael Laude
Urban Planner

Raphael joined WXY architecture + urban design as Planner in May 2018. He has a background in mobility, geographic information systems, and computer science. Raphael is currently contributing to three NYSERDA projects, promoting curbside electric vehicle charging in New York City, assessing the opportunity for residential carsharing in Westchester, and assessing developer interest in electric vehicle charging.

Prior to joining WXY, Raphael interned at Oakland’s Office of Mayor Libby Schaaf and OakDOT. There Raphael worked on incorporating equity metrics into Oakland’s paving policy and bringing demand-responsive parking to the City’s Downtown and Chinatown. As part of this last effort, he wrote a script that mapped parking revenue to blockfaces, streamlining the data pipeline from smart parking meters to GIS. Raphael was a graphic designer for the non-profit PSE Healthy Energy, where he helped translate research in renewable energy and hydraulic fracturing into accessible infographics. Raphael was a design intern at Turf Advisory where he built the firm’s website and brand.

Raphael received a B.S. in Urban and Regional Studies from Cornell University. Raphael was a research assistant to PhD candidate Ryan Thomas in the spring of 2018, helping redefine and produce indicators of transportation access for a Data-Driven Yale report to the United Nations Environment Programme. As a student consultant in the fall of 2017, Raphael produced a report for NYC DEP and NYCHA examining strategies for integrating Green Infrastructure on the Ravenswood Houses campus in Astoria.

Professional Experience
2018-present: WXY, Urban Planner
Fall 2017: Turf Advisory, Planning and Design Intern
Fall 2017: NYCDEP & NYCHA, Student Consultant
Summer 2017: OakDOT, Mobility Intern / Oakland Mayor’s Office of Libby Schaaf, Transportation Policy Intern
2014-2015: PSE Healthy Energy, Graphic Designer
Summer 2015: Archetype Group, Architecture and Planning Intern

Academic Experience
Spring 2018: Research Assistant, Cornell PhD Candidate Ryan Thomas, Ithaca, New York
2015-2017: Organization of Urban and Regional Studies, Vice President / Faculty-Dean Liaison
Fall 2016: Research Assistant, Professor Thomas Campanella, Ithaca, New York
2016: Student Assembly Infrastructure Fund, Voting Member
2015: Cornell University Sustainable Design, Project Identification and Expansion Team Member

Relevant Projects
- NYCDOT Curbside EVSE Siting, Expected 2019
- NYSERDA Residential Carshare, Expected 2018
- NYSERDA Curb Enthusiasm, 2018
- NYSERDA, Electric Vehicle Charging Stations Resource for NY Municipal Planners (add services), Expected 2018

Education
2018: Cornell University, BS in Urban and Regional Studies
Kimberly Sescoe

Owner & CEO, Special ProjX LLC
Principal, Public Engagement Associates

Experience: 25 years

Affiliations: National Coalition for Dialogue and Deliberations
American Society for Association Executive
International Association of Travel Agents Network

Education: Master of Science in Management, University of Maryland University
College, Bachelor of Science in Political Science, Barry University
Executive Certificate in Facilitation, Georgetown University, Institute for Transformational Leadership

Kim Sescoe is the owner of Special ProjX LLC and principal in Public Engagement Associates. As a principal in Public Engagement Associates, Kim Sescoe lead project management teams and logistics for large scale projects that enable organizations, government agencies, institutions, and businesses to effectively engage their constituents. She has worked with groups such as the National Youth Advocacy Coalition, National Institutes of Health, DC Neighborhood Action and Carnegie Endowment for International Peace. She recently completed citizen engagement efforts for the Walter Reed Local Redevelopment Authority and Department of State as they develop reuse plans for the former Walter Reed Army Medical Center site.

Her broad experience includes working on large teams partnering with planning firms on urban planning projects in the DMV and nationally. From 2007-2013 Kim was a senior program associate for AmericaSpeaks providing citizen engagement strategies for local governments, non-profits and communities. As project executive and project manager, she provided oversight and leadership on numerous large scale projects including budget development, work plan management, staffing and team development, event management, client relations, community outreach and engagement, and program design support. Over the past 10 years, Kim has increased her role as a facilitator and co-facilitator of staff, stakeholder and community meetings and has played a key role in numerous program design processes.
Theo Brown
Principal, Public Engagement Associates

Experience: 35 years

Education: Master of Divinity, Duke University
Bachelor of Arts in Political Science, Baylor University

Affiliations: National Coalition for Dialogue and Deliberation
Center for Faith and Civic Engagement

Theo Brown has more than 35 years of experience as an organizer, manager, facilitator, and trainer for non-profit organizations that work to engage citizens on important issues that impact their lives. He has worked for several large national organizations on behalf of social justice, human rights, racial reconciliation, and intercultural understanding, including: Amnesty International, Common Cause, Ground Zero, National Days of Dialogue on Race Relations and the Faith and Politics Institute. As a consultant he worked with a wide variety of organizations and government agencies such as: AARP, the Center for Disease Control, the Episcopal Diocese of Louisiana, City of Alexandria, VA the Interfaith Alliance and the Mayor’s Office in Portland, OR.

From 1999-2013 he was a Senior Associate with AmericaSpeaks and from 2014-2017 with Public Engagement Associates where he coordinated outreach and recruitment for dozens of citizen engagement projects around the country. He helped organize large 21st Century Town Meetings with demographically representative groups of participants in New York City, Washington, DC, New Orleans, Los Angeles, Atlanta, Dallas, Albuquerque, Cincinnati and many other cities. He designed and facilitated a three-year citizen engagement process in Washington, DC that brought hundreds of residents together to plan for the reuse and redevelopment of the former Walter Reed Army Medical Center site and has played a significant role in our work in Wards 7 and 8 in the District of Columbia, Ellicott City, and Baltimore.

PROJECT HIGHLIGHTS

Ward 8 Parents’ Forum, Washington, DC  Summer  2014
The Bainum Foundation, an educational foundation seeking to invest resources in the low-income neighborhoods Washington, DC, asked PEA to design and facilitate a forum for parents of young children in Ward 8 which has the highest percentage of low-income residents. Theo helped manage the design of the forum which focused on identifying primary concerns of parents and recruiting the more than 100 parents who participated. Information gained at the forum helped shape the investment priorities adopted by the Foundation.
**Summary of Qualifications**

Tom is one of the founders of School Bus Consultants and has provided leadership of the business for nearly two decades. Over this time, he has provided advisory services to school district clients throughout the United States and Canada, directly managing many of the company’s most complex and far reaching projects. These have included projects that established new and innovative methods of service delivery, facilitated complex organizational change, and required complex analyses.

Tom has a wide variety of experience in business operations and logistics, and in the evaluation of public sector student transportation organizations. His specific expertise is in the areas of operations and logistics management. Much of his project experience has focused on the evaluation and reengineering of operations, including organization design and strategic planning, project management, service cost analysis and performance measurement, and data-based decision support.

- 30 years of progressive experience in advisory services and logistics management
- Extensive change management and process facilitation experience
- Leadership of diverse, multi-agency project teams

**Education**

Master of Business Administration, Concentrations in Operations & Logistics
Syracuse University

Bachelor of Science in Maritime Transportation
Maine Maritime Academy

**Employment History**

**Founder & Vice President**, School Bus Consultants 2001 – Present

Since 2001, Tom has focused on assisting school districts and municipal governments across the United States and Canada with improving the efficiency and effectiveness of school transportation and fleet management services. Tom has been a leading advocate of improving contract management practices, expanding the use of performance measurement for management decision making, and improving the efficiency of route delivery services.
### Giovanni Cosentino

#### Summary of Qualifications

Giovanni Cosentino is a Manager with School Bus Consultants. He assists clients in improving transportation program efficiency and performance based on analytical and operational analysis. Giovanni applies his knowledge of Geographic Information Systems (GIS) and geographic principles to conduct analyses that examine and visualize spatial relationships in order to solve complex problems and provide functional solutions for bell time alignments, routing structures, student eligibility and boundary data, and software integration. Clients with whom he has worked recently include Atlanta Public Schools, Bakersfield (CA) City School District, and Syosset (NY) Central School District.

- More than 8 years in depth experience with GIS
- Developed GIS curriculum at Gwinnett Technical College
- Expertise in geospatial analytics and boundary realignment facilitation

#### Education

- Master of Science, Geosciences, Georgia State University, Atlanta GA
- GIS Graduate Certificate, Georgia State University, Atlanta, GA
- Bachelor of Arts, Environmental Studies, Minor: Geography, Winthrop University, Rock Hill, SC

#### Employment History

**GIS Specialist** Atlanta BeltLine Inc. Atlanta, GA: May 2013-September 2016

Giovanni worked at Atlanta BeltLine Inc. (ABI) as a GIS Specialist. Giovanni developed supporting data and materials for ABI’s NEPA Tier 1 Environmental Impact Statement and Environmental Assessments for ABI’s transportation corridor. He utilized data from multiple sources and conducted appropriate analyses to develop materials and supporting data for City of Atlanta’s transportation referendum. He established a dedicated GIS website for ABI projects with project-specific GIS applications. Giovani managed all GIS related projects ensuring that requirements were satisfied. Assisted in developing and implementing short-term and long-term master plans that focused on creating mixed-use areas.

**GIS Instructor** Gwinnett Technical College-Lawrenceville, GA: February 2012-May 2013

Giovanni worked as a GIS Lab Developer for Gwinnett Technical College and developed course work that included lectures, tests, and labs for introductory and advanced GIS classes.

**Graduate Research Assistant** Georgia State University-Atlanta, GA August 2011-May 2013

Giovanni developed curriculum pertaining to climate change research for the development of Weather and Climate courses.
WXY project team will be led by Adam Lubinsky, Principal-In-Charge, who brings extensive expertise in handling complex planning projects that deal with planning for school and community facilities along the north-east region and beyond. His experience in school planning process can be traced all the way back to his Ph.D. thesis, Schools as Generators of Urban Change, that considered the effects of different school assignment policies in New York and London on neighborhood development. At WXY, Adam’s notable school projects include leading the New Rochelle School capacity Study, Lancaster School Boundary and Redistricting Plan and Boston Public School Geospatial Analysis among others. He is joined by Kushan Dave, Director at WXY, who has a strong track record of managing technical and community-oriented planning studies at different scales. His most recent projects include developing strategies for Colgate University through an involved master planning and engagement process. In his role prior to WXY, Kushan led key analytical components and data management of DC Public Education’s 2018 Master Facilities Plan (MFP) that provided comprehensive and sustainable growth strategies for public-school facility planning and management. Kushan who is based in Washington, D.C., will serve as the project manager and the point of contact for the Howard County Public School study.

Adam and Kushan will be supported by George Janes, an Associate of WXY, whose past projects include conducting demographics and dissimilarity analysis for the NYC DOE Equitable Admissions Study and Boston Public Schools Assignment Model; Traci Sanders, Director of Civic Engagement and Chris Rice, Senior Planner will lead civic engagement efforts with Public Engagement Associates (PEA); Planners Cara Michelle and Raphael Laude will provide additional engagement and technical support.

WXY will be supported by Public Engagement Associates (PEA), who have more than 18 years of experience leading prominent public engagement efforts in the Washington, DC area initially with AmericaSpeaks and now with Public Engagement Associates. In addition, WXY will also collaborate with Transpar, to provide transportation analysis of school clusters.

WXY will be in charge of managing all the sub consultants.
1.0 Intent
2.0 Introduction
3.0 Scope of Services
   3.1 WorkPlan
   3.2 Schedule of Services
1.0 Intent

Consultant understands and complies with the intent of the proposal.

2.0 Introduction

The team acknowledges and complies with the planning, policy and additional context laid out in the RFP.

3.0 Scope of Services

APPROACH AND GUIDING PRINCIPLES

School cluster adjustments and changes to school feeder patterns can be a complicated process. This process requires an in-depth understanding of present and future conditions of a given region along with the impacts associated with the physical and socio-economic landscape of Montgomery County. As such, the following guiding principles outlined below will inform our work plan:

1. **Redistricting and Inequality:** Consultant is aware that the application of student assignment mechanisms and redistricting may have a disproportionate effect on disadvantaged students. As we analyze date, we will take significantly greater care to assure that students with disabilities, English language learners, and minority and low-income students, families, and communities do not bear the burden of redistricting.

2. **Policy FAA:** Consultant will adhere to the objectives outlined in Policy FAA and will ensure that any potential recommendations to cluster boundary changes advances the core objectives outlined in the policy document.

3. **A Community Oriented Approach:** It is imperative to walk hand in hand with the community to ensure an equitable and acceptable outcome. In that respect, The team will work collaboratively with public officials and agencies at all levels to identify the needs and aspirations of their constituent stakeholders. The success of a community driven approach depends on adherence to essential key principles for effective citizen engagement. For this project, there are four keys principles that should be kept in mind throughout the planning process:
   - **Inclusive Demographics:** Along with MCPS staff’s assistance, we will recruit a wide range of citizens and stakeholders to come to the table, even those who are historically hard to engage; this will include residents from all parts of the county and people of diverse racial, ethnic, cultural and economic backgrounds
   - **Informed Participation:** We will assist with the creation of discussion and presentation materials to ensure that meeting participants have the information they need to provide useful feedback and clear recommendations
   - **Importance of finding Common Ground:** We will facilitate civil, dynamic deliberations in which citizens and stakeholders work through differences to develop broad agreement on priorities

4. **Data Driven Performance Based Planning Approach:** Our performance-based planning approach allows for using big data in an iterative and interactive manner that results in tangible outcomes. Using the data provided by MCPS, the team will identify Key Performance Indicators (KPI) that resonate with Policy FAA and MCPS’s Key Facility Indicator (KFI). Such an approach will enable the team, along with MCPS, BOE and the Superintendent, to realize the opportunities and challenges of achieving diverse, accessible and equitable school clusters, when reconfiguring school cluster boundaries.
3.1 WORK PLAN

The team will take a comprehensive approach in supporting MCPS’s commitment to ensure that every child receives an excellent education through the development of a school model that enables student from all background to thrive. The scope for completing work is described on the following pages according to the six (6) primary tasks outlined below:

TASK 0: PROJECT MANAGEMENT

Consultant will take responsibility for performing all work necessary to this process in timely manner and make sure that the various elements effectively feed into one another. Consultant Managing Principal and the Consultant project manager will lead the team to ensure that the project delivery standards are being met. They will also be the first internal point of contact within the project team, ensuring streamlined communication and time effectiveness. Consultant will conduct bi-weekly check-in meetings with the client group, to be held by phone, as required. Consultant will schedule a kick off meeting with the MCPS staff to clarify the work plan and project schedule prior to beginning work and will set out an appropriate team management structure to ensure timely submission of all deliverables.

TASK 1: CONSULTATION ORIENTATION

To contextualize the vast amount of existing body of research, trend analysis and open datasets, our team will conduct a review of existing conditions in two parts to ensure full comprehension. Part 1 will occur prior to kick-off meeting and will look at open source datasets and reports through MCPS website such as the FY2020 CIP, Policy FAA Document, Public School Enrollment Projects (2018-2027), US Census, Montgomery County Planning website and other sources that look at demographics, socio-economic trends, development and transportation trends. The team will prepare a preliminary SWOT analysis presentation of the existing clusters that will help start the conversation during the kick-off meeting. Part 2 will occur after the kick-off meeting and will involve a deeper dive into additional datasets (such as student level dataset) provided by the MCPS staff team.

TASK 1.1 Review of Trends and Data (Part 1):
The team will review and summarize the major recommendations emerging from available research documents and open source data that already exists and will develop a list of key questions raised by that body of work. This information will be used to supplement our existing understanding of the school clusters, accessibility challenges and opportunities within each of the clusters.

Task 1.1 Deliverable: Consultant will prepare a draft presentation for the upcoming kick-off meeting summarizing key points from existing studies and available data sources and draft a preliminary SWOT analysis that can guide the kick-off meeting.

TASK 1.2 Kick Off Meeting:
The team will participate in a kick-off meeting with the MCPS staff, to create a shared understanding of the project purpose, goals and objectives, engagement process and schedule. For this meeting, Consultant will prepare a draft process outline and schedule for discussion with the MCPS staff team, based on our refined understanding under task 1.1. The meeting will include identification of key issues, proposed community engagement
strategies, exchange of information, discussion on BOE policy and other relevant standards. At this meeting a schedule of regular meetings between Consultant Project Manager and the MCPS’s Project Manager will be set to run throughout the planning process. It is anticipated that these meetings will occur at least bi-weekly unless project activities suggest more frequent interactions. As we are in Washington D.C., we are available to meet intermittently as needed to address topics and solve any challenges as they arise. MCPS staff will make available any new datasets, including student level datasets, that will be used for further analysis.

**Task 1.2 Deliverable:** Consultant will prepare a memo within 5 business days summarizing key discussion points from the kick-off meeting including changes to project schedules, community engagement process and other deliverables.

**Task 1.3 Deliverable:** Consultant will refine the school cluster SWOT analysis and presentation prepared under Task 1.1 that will serve as a foundation for Task 2 deliverables and will guide future data collection, research and analysis efforts.

**Task 1 OVERALL DELIVERABLES**

- Summary report of issues identified during the kick off meeting including preliminary SWOT analysis based on review of existing conditions data. The deliverable will be submitted electronically and updated once and resubmitted following receipt of staff team compiled comments.
- Refined Workplan
- Refined Community Engagement Plan

**Task 2: BENCHMARKING AND BEST PRACTICES** (to start simultaneously)

**Task 2.1 BEST PRACTICES IN BOUNDARY CHANGES**

Looking at school districts from around the country, Consultant will summarize strategies for projecting school enrollment and managing over- and under-enrollment, potential criteria to consider when creating or revising school boundaries, identify common school assignment mechanisms, discuss consideration for addressing segregation issues related to redistricting, and provide an overview of strategies to engage families and communities in the school boundary review process.

This section is not meant to be an exhaustive study, and the consultant team will utilize available reports and data to perform quick analyses.

**Task 2.1 Deliverable:** Memorandum summarizing strategies used by school districts from across the country
**TASK 2.2 COMPARABLE BENCHMARKS**
Upon identifying best practices within the industry, The team will use open data sources to analyze jurisdictions of similar sizes within the DMV region that have faced similar issues to that of MCPS, and the long- and short-term strategies implemented by their respective school systems to alleviate the issue. Such a comparative benchmarking will allow The team and MCPS staff to better understand the associated trade-offs when assessing MCPS boundaries. Lastly, The team will critically analyze the MCPS policy and the Policy FAA to identify any additional parameters that may need to be included as part of the boundary analysis.

**Task 2.2 Deliverable:** Benchmarking matrix with comparable school systems to identify possible approaches and best practices to student assignments processes and patterns.

**TASK 2 OVERALL DELIVERABLES**
- Memorandum summarizing key findings from best practice studies and benchmarking matrix of other jurisdictions. Document to also include list of additional

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### Strategies Used by Different School Districts in the DMV to Address Overcrowding

**Temporary**

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<tr>
<td>Trailer classrooms</td>
<td>Temporary buildings</td>
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<tr>
<td>Voluntary transfers</td>
<td>Art and music rooms converted to classrooms</td>
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<tr>
<td>Review of how classroom and office space is used</td>
<td>Moratorium on new residential development</td>
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**Policy**

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<tr>
<td>Redistricting</td>
<td>Shuttle to local community college</td>
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<tr>
<td>More courses with Internships, Apprenticeships, and Site-Based Work Experience</td>
<td>Fee for developers building in areas with overcrowded schools</td>
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<tr>
<td>Moving ESOL and magnet programs out of schools that are over capacity</td>
<td>Eliminate penalties if overcrowded schools don’t meet enrollment projections</td>
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**Infrastructure**

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<tr>
<td>Build a new school</td>
<td>Modernize buildings</td>
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<tr>
<td>Add new classrooms</td>
<td>Create a specialized school with a focus on out of classroom learning</td>
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<tr>
<td>Merge schools that are over- and under-capacity to create a two-campus school</td>
<td>Create a centralized Early Childhood Learning Center</td>
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<tr>
<td>Use public land for new school building</td>
<td>Incentives for low-cost construction</td>
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School districts included: Fairfax County, Prince William County, Chesterfield County, Richmond Public Schools, Albemarle County, Franklin County, Howard County, Harford County, Baltimore County, Prince George’s County, and D.C. Public Schools.
TASK 3: COUNTY-WIDE COMPREHENSIVE ANALYSIS

TASK 3.1 KPI DEFINITION AND METHOD DEVELOPMENT

Building on the understanding of client priorities from Task 1 and best practices from Task 2, the team will work with the MCPS staff to identify a list of key performance indicators that accurately reflect the School District’s needs and aspirations.

Deriving from the team’s vast expertise in modeling, spatial analysis, and scenario simulation, Consultant will generate a document that outlines the methodology for each of the KPI in a memo format along with associated benchmarks and KPI weights. During the KPI definition process, the team will work closely with the client team to ensure that the KPI methodology aligns closely with Policy FAA objectives. The KPI models will be built into a geospatial tool that will produce results that can be explored, understood, and used iteratively so that different policies and assumptions can be tested. While the system we propose will allow for analyzing current cluster boundaries as required by the RFP, the system can become a tool in the management of facilities into the future.

Task 3.1 Deliverable: Memorandum outlining Key Performance Indicators and their respective methodologies and weight.

TASK 3.2 BASELINE CLUSTER SCENARIO

Using the data and existing capacity analysis done under Task 1 and Key Performance Indicators (KPIs) developed under Task 3.1, the team will develop a county-wide baseline scenario of all the school clusters and develop a series of assessment that will include, but not limited to the factors identified below.

The team will develop a series of geospatial models enabling them to perform quick boundary analysis and any resulting

- **Student Body Demographics**: The team will analyze demographic and existing enrollment with place of residence of the students to identify existing cluster diversity. Such geocoded XY dataset can allow the team to calculate impacts that result from any changes to that cluster boundary as captured by access and diversity related KPIs. In addition, the team will also look at future projection and land use changes to accurately predict the changes in demographics of a cluster. Such an analysis will allow the team to assess the degree to which current boundaries facilitate or impede a diverse study body population in each school.

- **Transportation Patterns**: Develop a comprehensive understanding of county wide transportation patterns and to highlight the portfolio of transportation options throughout each of the clusters such as walking, public transportation, or school provided transportation. Once the baseline is established, the team will compare transportation pattern results between schools and clusters to identify disparities in transportation modes and quality student service such as transportation availability and time and distance to school. A Geographic Information Systems (GIS) model will be developed that incorporates school locations, student locations, historical traffic data, and the local road network to help determine if these disparities are due to geographic constraints such as school facility locations in relation to the student’s residents, traffic constraints, lack of resources, or ineffective planning.
• **Geographic Proximity to Schools:** The team will examine how boundaries affect potential walking routes to school for students. We will then run an analytical model that utilizes the local street network, student locations, school location and facility capacities to identify and rank the three schools that are geographical closest to each student. Such an approach will help us spatially identify which students are affected by the current district boundaries.

![Map of school locations](image)

• **Facility Utilization:** The team will ascertain the operating capacity of each of Montgomery’s public schools based on State standards as well and diverging MCPS policies and building standards. Any non-State standards to be included in the capacity analysis, including minimum capacity, will be provided to Consultant or developed through discussion of best practices with the MCPS. The team will research and review state and local standards for students per classroom, among other metrics. Using the existing facility conditions assessment analysis, The team will assess the degree to which the current boundaries facilitate or impede facility utilization in terms of program capacity and enrollment in schools.

• **Concept of Community Schools:** As part of the baseline scenario, The team will analyze how the concept of community schools can be used to provide extracurricular or supplemental services to a school facility. The team will be critical in its evaluation of recommending these programs given that similar programs have been repealed from education agendas, in states such as New York.

• **Articulation and feeder patterns:** For each of the school cluster, Consultant will identify the racial demographics of the feeder schools or neighborhood and assess how that feeder system might further exacerbate inequitable access to facilities.

• **Frequency of review:** Given the demographic, growth trends The team will use the findings from the baseline scenario to identify a threshold at which each cluster might trigger a review process, provided no changes are made to the cluster boundary. In addition to the threshold, The team will also point to the pros and cons of a regular cycle of reviewing.
boundary assignments, and the impact on stability of assignment overtime for students and families.

**Task 3.2 Deliverable:** Summary report outlining the baseline cluster scenario and an assessment of each of the topics identified above.

**TASK 3.3 CLUSTER SCENARIO ALTERNATIVES**
Consultant will utilize a tipping point and an algorithmic school rezoning method to identify capacity issues. This approach will feed into the KPIs identified through Task 3.2 to enable comprehensive scenario comparison.

**ALGORITHMIC SCHOOL REZONING TOOL**
Using python codes and GIS based models, Consultant has developed a school rezoning model drawing from the rich applied math fields of optimization and metric geometry. Our model uses the Monte Carlo method, semi-randomly swapping geographic units from zone to zone many times in a row (hundreds, thousands, or tens-of-thousands of times). The model initially allows almost all swaps, before gradually becoming more conservative and only allowing swaps that result in an improved score of the identified KPIs.

This method allows for robust and effective testing of boundary options. Once all the options are generated, the team along with MCPS staff can quickly sort through and identify a boundary options that best serves the Policy FAA goals.

**DEFINING AND USING SCENARIOS**
The scenario planning framework for the geospatial model will allow us to define different scenarios, which might include:

- School configuration to allow for increased population
- School configuration keeping neighborhoods together
- Maintain a reflection of the economic and ethnic diversity of the District's student population in the various individual school attendance zones to the maximum extent possible
- School configuration to balance Kindergarten within neighborhood schools
- School configuration to balance Pre-K within neighborhood schools
- Altering assignment boundaries, and/or adding more assignment areas
- School closings / openings / mergers
- Varying student assignment rules
- Deployment and/or movement of special programs

The team will produce three (3) boundary plan options. The boundary plan options will include a synthesis of data analysis including analysis of existing cluster boundaries and enrollment projections to school capacity and the set of factors which inform the scenarios. Consultant will revise the cluster boundary options based on stakeholder and MCPS staff team input.

**Task 3.3 Deliverable:** Summary presentation outlining three (3) initial cluster boundary plan options with associated KPI scorecards

**TASK 3 OVERALL DELIVERABLES**
- Summary report outlining Key Performance Indicator List Methodology
- Summary presentation of Baseline Scenario Results with KPI results
- Summary presentation of three (3) cluster boundary option with KPI results
TASK 4: COMMUNITY ENGAGEMENT

The team has a long history in the Washington-Baltimore area of successfully engaging residents in a wide range of important issues that impact their lives. This success has been possible because of adherence to some key principles that are essential for effective citizen engagement. For this project, there are four keys to successful citizen engagement that should be kept in mind through the planning process:

- Stakeholders and other interested citizens need to be involved as soon as possible so that they feel they have a hand in shaping the process
- It is very important to integrate online learning and in-person meetings and this may involve the need for some basic training about how to use the online tools
- There need to be multiple formats for listening and receiving feedback
- There must be a clear and consistent flow of information from the county representatives to the public and also from the public back to county officials

In addition, the team is also well versed with traditional and non-traditional outreach approaches. A few of these approaches are outlined below:

TASK 4.1 COMMUNICATION PLAN

We will work closely with the MCPS staff and other county officials to develop an effective communication plan to support resident involvement in the face-to-face and online aspects of the process. This plan will build on the regularly communication that MCPS already has with county residents and make adjustments and additions as required by this project.

Some elements of that plan will be:

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<tr>
<th>TRADITIONAL OUTREACH AND ENGAGEMENT STRATEGIES</th>
<th>NON-TRADITIONAL OUTREACH AND ENGAGEMENT STRATEGIES</th>
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<tr>
<td>• Surveys</td>
<td>• Use of digital tools and live polling such as Thoughtexchange</td>
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<tr>
<td>• Online</td>
<td>• Consultant’s proprietary urban analytics tools with interactive dashboard to get real-time feedback of boundary changes on MCPS identified KPIs</td>
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<td>• Street surveys</td>
<td>• Mobile engagement</td>
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<td>• Working Group Formation</td>
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<td>• Attendance Area Committees</td>
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<td>• Workshops</td>
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<td>• Open house</td>
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<td>• Breakout sessions</td>
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<td>• Visioning Sessions</td>
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<td>• Charrettes</td>
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<td>• Timely and clearly written press statements</td>
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<td>• Carefully arranged media interviews</td>
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<td>• Email blasts that go to all lists MCPS has access to</td>
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<td>• An editorial calendar to drive the project’s social media presence on Facebook, Twitter, Instagram, etc.</td>
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<td>• An email newsletter that is delivered twice a month to a list of key contacts during the duration of the boundary process</td>
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<td>• An interactive website that is accessible and easy to use</td>
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Task 4.1 Deliverable: Final communication plan with refined content and schedule of sub-components such as email blasts, newsletter dissemination, and interactive website content.
TASK 4.2 BUILDING A DIVERSE AUDIENCE
The team will work with school system representatives to build strong connections with a wide range of stakeholders and other interested citizens. Examples of the many diverse groups we will engage are:

- Parent Teacher Associations (PTAs), TA's and other student groups
- District Leadership TAs
- Attendance Area Committees
- Community organizations,
- Neighborhood associations
- Ethnic organizations
- Business groups (Especially Minority Business Groups)
- Religious congregations.

The team, along with MCPS, will assess the existing contacts and determine which ones need to be strengthened and which new contacts need to be made. The team has successfully convened people of different ages, races and ethnic groups, income levels, educational backgrounds, religions, and points of view in scores of meetings in the Washington-Baltimore area. We are able to do this because we conduct outreach that is 1) carefully targeted, 2) builds on collaborative relationships with key stakeholders and organizations, and 3) utilizes multiple ways to issue invitations.

- **Targeted recruitment**—We will review the existing contact list of key individuals and organizations and add to it as necessary to make sure all relevant groups in Montgomery County are included. Special attention will be given to identifying those groups that should be involved but are generally “hard to reach” such as low income individuals, young adults, cultural minorities, etc.

- **Close collaboration with stakeholders and key organizations**—We will work with people who represent important stakeholders and community groups to make sure they actively promote participation in the planning process. We will also identify individuals from each part of the county who will serve as community representatives and take responsibility for outreach to a specific segment of the population.

Boston Public Schools, Assignment Policy Development and Geospatial Analysis
• **Utilizing multiple ways to issue invitations**—Invitations to participate in this planning process will be issued in a wide variety of ways and those who are mostly likely to be interested will receive multiple invitations. Invitation methods will include: emails to lists of interested people, phone calls to key leaders, online notices, social media postings, announcements at public meetings, media announcements and distribution of flyers and other handouts. These various invitations will be designed and delivered strategically so that they reinforce each other.

**Task 4.2 Deliverable:** *Final list of stakeholder participant who will attend the proposed engagement sessions.*

**TASK 4.3 COMMUNITY ENGAGEMENT SESSIONS**
The team will plan, organize and facilitate ten (10) community meetings including one (1) meeting with Board of Education and members of the public to get in person community input on existing cluster boundary analysis. These meetings will present relevant information, provide data analysis and findings, gather feedback, and identify key priorities and concerns. These meetings will serve as one of the main ways that community members can give input on boundary issues. During these community meetings, the team may use some of the online scenario tool capabilities to allow for a more interactive and involved engagement experience.

We believe that there are three things necessary to make these meetings a success: 1) getting the right people in the room, 2) designing a meeting that can accomplish the desired goal and 3) conducting the meeting so that it effectively conveys information and captures the desired community feedback.

**Getting the right people in the room**

• Recruit participants from diverse groups—Specific goals will be set for each meeting in terms of how many people we want to attend and the type of individuals we want to be there. We will invite participants from the very broad range of groups that are described above and track responses in order to get participation that is as inclusive as possible. A special effort will be made to identify and reach out to those who are generally “hard to reach” for meetings like this (i.e. young adults, low income residents, immigrants, etc.). A written plan of specific steps to take will be developed and implemented for each “hard to reach” group that is identified.

• Cover all parts of County and Clusters—Meetings will strategically located in different parts of the county and school Clusters so that all interested residents will have easy access to a meeting. We will also make sure that the venues that are chosen are well known and accessible to all.

**Designing a meeting to accomplish the desired goal**

The team will work closely with MCPS staff to design the public meetings. Each meeting will be a combination of sharing information with those who attend and getting feedback from these participants. The meeting agendas will be designed to allow adequate time for each of those tasks and make sure they are done effectively. The team will also work with the school system planning team to make sure that materials are prepared and disseminated that provide key information in a clear and understandable manner. This will
include information on how to use the online tools which can be used to keep current on the issues and give input into the planning process. Meetings will generally begin with an opening presentation that gives relevant information and frames the discussion. The agenda will also be structured with multiple opportunities for those who attend to ask questions and express their views. This will be done by using methods such as: small group table discussions, questions and answer periods, worksheets which elicit feedback from all participants, brief periods for individual comments and the use of polling keypads.

The team will work with the MCPS staff to make sure that appropriate venues are chosen for each meeting and that all of the various logistics are handled efficiently. This includes all of the issues related to room set up, audio-visual equipment, handouts, translation, refreshments, parking, and child care. Significant damage can be done to a meeting if these things are not handled and it is very important they be done well.

**Conducting the meeting**

Consultant facilitators are experts at sharing information, explaining to participants how they can be involved and keeping the meeting focused on the agenda. A lead facilitator - or perhaps two co-facilitators - will guide participants through the agenda at each meeting and make sure that everyone gets briefed on key information and has an opportunity to give feedback. Meetings will also share information about the online tools being used in the planning process so that the work done in the meetings can be integrated with the online feedback. The team has significant experience communicating technical concepts in an interesting and accessible ways and it will be a priority to do this throughout the engagement process.

**Report Results to Staff and Superintendent**

After each community meeting, we will create a short document that summarizes the major ideas, themes, and other feedback from the meeting. When all of the meetings are completed we will meet with the school system staff to make sure we understand definitively what data, results and recommendations are most important. After that, we will write a report that compiles and synthesizes the input from all aspects of community engagement. We will highlight the key themes from all of the discussions that take place and also share and analyze the quantitative data that has been received at the meetings.

**Task 4.3 Deliverable:** Individual summary memos for each of the ten (10) community meetings documenting major ideas, themes and feedback

**TASK 4 OVERALL DELIVERABLES**

- Report outlining engagement strategy, list of participants, and summary of issues and topics discussed during each of the community engagement sessions conducted by the team.
TASK 5: FINAL REPORT AND PRESENTATION

The team will prepare an interim and a final report that will summarize the analyses, findings and community feedback completed up to the time of the reporting. We will prepare graphically compelling narratives that uses cutting edge data representation techniques to enable full comprehension of complex concepts. Ideally, we will include yet another round of community engagement at the end of the interim report to ensure that all the diverse opinions are articulated correctly in the final report.

5.1 Interim Report
Using all the analysis from Task 3.1, The team will produce a draft Existing Conditions Analysis Report that includes the component deliverables generated throughout Task 3.1. This Report will include an atlas of opportunities and constraints. The Commission’s staff team’s Project Manager will be responsible for compiling all Staff team comments and submitting a merged set of comments and requested changes to the The team. Upon receipt of the comments, The team will provide an updated draft report at no additional cost.

Task 5.1 Deliverable: Interim report outlining summary of steps, community engagement and solicited feedback using graphically compelling narrative. In addition, The team will also be prepared to present the findings of the interim report with the community. The team will prepare the report and submit it digitally for review. The team will provide an updated draft of the Interim Report addressing the requested changes to an extent possible.

Optional Task

5.2 Additional Stakeholder Interviews (Optional Task)
To supplement the Interim Report, The team will collaborate with the MCPS staff team to identify additional stakeholders to interview (including, but not limited to, those identified as part of Task 4.2) regarding issues and opportunities identified during the analysis of existing conditions. The team will compile the results of up to one (1) additional interview into a supplemental Stakeholder Interview Report. The team expects this to be a quick two (2) week exercise that can have a meaningful impact on the project outcome.

Task 5.2 Deliverable (Optional): The team will compile the key take-aways of the interviews into a Stakeholder Interview Report in the form of presentation slides, using concise text and graphics, for ease of distribution and consumption online and in print. This report will be submitted digitally.

5.3 Final Report
Based on inputs solicited under Task 4, Task 5.1 and Task 5.2, Consultant will generate final exiting conditions report with the supporting maps, illustrations and KPI dashboard profiles per each of the school clusters. If necessary, Consultant staff will engage in additional workshops with the MCPS staff to refine the analysis and boundary changes in the best interest of the project at no additional cost. Consultant staff will work closely with MCPS’s Project Manager to ensure that staff team’s inputs are received in a timely manner before preparing a final version of the report.
**Task 5.3 Deliverable:** Within two (2) weeks, The team will create a digital copy of the final existing condition report that will be circulated with the Commission staff team for a final round of inputs. Following the round of inputs from MCPS staff, The team will revise the report and provide a digital and two (2) hard bound copies of the final report.

**TASK 5 OVERALL DELIVERABLES**

- The team will prepare a digital and (2) hard bound copies of Interim Report and deliver to the MCPS team by February 15 2020.
- The team will prepare a digital and (2) hard bound copies of Final Report incorporating all the comments till date no later than June 01 2020
- The team will summarize key findings from the project, including key themes from community engagement process into a presentation format as agreed upon with MCPS staff.
### 3.2 Schedule of Services

Schedule of services to be revised based on discussion with MCPS.

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<td>0.1 Ongoing project management (inc. bi-weekly meetings)</td>
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<td>1.2 Kick-off and Orientation Meeting</td>
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<td>2.1 Best Practices in Boundary Changes</td>
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<td>2.2 Comparable Benchmarks</td>
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<td><strong>3 COUNTY-WIDE COMPREHENSIVE ANALYSIS</strong></td>
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<td>3.1 KPI Definition and Method Development</td>
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<td>3.2 Baseline Cluster Scenario</td>
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<td>3.3 Cluster Scenario Alternative(s)</td>
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<td><strong>4 COMMUNITY ENGAGEMENT</strong></td>
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<td><strong>5 REPORT AND PRESENTATION</strong></td>
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<td>5.1 Interim Report</td>
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<td>5.2 Additional Stakeholder Interviews (Optional)</td>
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<td>5.3 Final Report</td>
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- Stakeholder Engagement / Workshops Sessions
- Key Deliverable
- Optional Deliverables
PROJECT MANAGEMENT

0.1 Ongoing project management (inc. bi-weekly meetings)

0.2 Internal Presentation / Work sessions with MCPS Project Team (in addition to bi-weekly meetings)

CONSULTANT ORIENTATION & DATA ANALYSIS

1.1 Review of Trends and Data (Part 1)

1.2 Kick-off and Orientation Meeting

1.3 Review of Trends and Data (Part 2)

BENCHMARKING & BEST PRACTICES

2.1 Best Practices in Boundary Changes

2.2 Comparable Benchmarks

COUNTY-WIDE COMPREHENSIVE ANALYSIS

3.1 KPI Definition and Method Development

3.2 Baseline Cluster Scenario

3.3 Cluster Scenario Alternative(s)

COMMUNITY ENGAGEMENT

4.1 Communication Plan

4.2 Building a Diverse Audience

4.3 Community Engagement Sessions

REPORT AND PRESENTATION

5.1 Interim Report

5.2 Additional Stakeholder Interviews (Optional)

5.3 Final Report

Mar 2020 Apr 2020 May 2020


Summary Memo

Best Practices + Benchmarking Matrix

Summary Report: Baseline

Cluster Analysis

Cluster Alternatives

Final Stakeholder Interview Report

Intern Report (Draft)

Intern Report (Final)

Final Report (Draft)

Final Report And Presentation to MCPS Staff
TAB 3

4.0 Contract Term
5.0 Contract Termination
6.2 Relevant Projects
4.0 & 5.0
Contract Term & Termination

The team acknowledges and complies with the contract terms and termination clause laid out in the RFP
Consultant has been commissioned by the School District of Lancaster to implement the development of a School Boundary and Redistricting Plan in order to balance enrollment across the District’s twenty-two schools. Enrollment in the District has increased substantially in recent years; since 2013, more than 1,500 refugees have resettled in Lancaster County. The District also serves approximately 1,000 students who are homeless, lacking in basic necessities like clothing, school supplies, health care, and hygiene supplies. Furthermore, outdated policy regarding the provision of transportation services for students has not been revised to take into consideration the difficulties faced by Lancaster’s students in getting to school.

Responding to these challenges, the School Boundary and Redistricting Plan will seek to:

- Realign attendance zone boundary to balance student population proportionately at elementary schools based on an optimum range of 80 – 90 percent of school capacity.
- Realign attendance zone boundary to balance student population at secondary schools.
- Provide comprehensive scenarios for multiple situations.
- Form a task force, comprised of Administrative, Community, and Board Members, to review the findings and recommendations of the report to provide a non-binding recommendation to the School Board in the fall of 2019.
- Maximize transportation efficiencies.
6.2 Relevant Projects

NYC Equitable Admissions Study

Client
NYC Department of Education

Location
New York, NY

Status
Completed 2018

Consultant was commissioned by the New York City Department of Education to conduct city-wide, district-wide and school level dissimilarity analysis on five diversity indicators; poverty, the economic need index, English language learners, students in temporary housing and race. The analysis allowed Consultant, in collaboration with the DOE, to identify schools districts with high indices of dissimilarity (or stratification) and make comparisons between school districts and individual schools. Additionally, Consultant interviewed superintendents in key school districts to gain an understanding of each district, ongoing diversity work, and the superintendent’s willingness to engage in a larger community planning process.

RACIAL ISOLATION
(percentage of schools w/ 90% or more of Black + Hispanic students or Asian + White students)

- 77% - 100% of schools within a district
- 21% - 76% of schools within a district
- 0% - 20% of schools within a district

Racial isolation measures high concentrations of a single race within schools.
As part of a city-wide diversity plan to address school segregation, the New York City Department of Education commissioned Consultant to develop an outreach process and plan for more integrated and inclusive middle schools in District 15.

Consultant tailored an extensive public process to ensure all workshops were inclusive and accessible by providing multiple translators, food and childcare. Over five months, more than 500 people participated in four public workshops; 80 meetings were held with stakeholders, from councilmembers to public housing residents; and 800 more people responded to an online survey.

The complexity of school diversity issues—such as student travel patterns and the impacts of admission policies on middle school demographics—required a sensitive and thoughtful approach to data collection and analysis, made legible through engaging graphic design, accessible language, and video animations. The DOE is in the process of implementing most of the recommendations made in the final report.
6.2 Relevant Projects

Boston Public Schools
Enrollment Projections

Client
Boston Public School System

Location
Boston, MA

Status
Completed 2012

Consultant provided the Boston Public School District with a five-year enrollment projection, including population estimates by single year age, by Census block, by year for all children in the city of Boston. These children were then split between public and private schools according to public school participation rates for their neighborhood. Developed completely within ArcGIS using Python, the projection was developed as a tool designed not only to produce enrollment projections, but to test different policies and to develop a range of output so that the school planner could ask questions, and not simply react to the model results. Both the forecasts and the model were delivered to Boston Public Schools so that it could be used independently from Consultant.
Consultant was commissioned by Boston Public Schools to conduct an analysis and scenario testing for school assignment policy. Consultant modeled new school assignment approaches that balanced choice, social equity, school capacity and distance to schools. Comprised of three zones, the previous Boston assignment system allows students to apply for an unlimited number of schools.

As part of the study, the Consultant project team conducted a geospatial analysis of the current school assignment system and tested a number of new scenarios for school assignment using CommunityViz, a ArcGIS extension that offers the capacity to test a range of options and parameters. Consultant also created an online mapping tool that enabled parents and families to test the various scenarios by entering their home address, mapping the assignment systems relative to home address and viewing their school choices in each model.

Consultant, further provided the Boston Public School District with a five-year enrollment projection, including population estimates by single year age, by Census block, by year for all children in the city of Boston. These children were then split between public and private schools according to public school participation rates for their neighborhood.
As part of a redevelopment effort of downtown New Rochelle, Consultant studied the impact of the New Rochelle school district over a 10 year horizon based on anticipated new public school student registration. Opportunities for accommodating new students through classroom optimization, new construction, and policy changes were among strategies examined for managing school district population growth.

Consultant then completed a 10 year enrollment projection for all children in the district, not only those in public schools. This led to a more holistic outcome, understanding population trends and more nuanced changes in school enrollment over the study period. A broad demographic analysis took place that focused on spatial distribution of the population of New Rochelle. From these trends, an assessment of potential educational space expansion and improvement took place, with careful consideration of location and transportation needs.

Consultant then investigated an impact fee to calculate the proportionate share and likely expense incurred by the school district due to the proposed redevelopment. Additionally, a plan-based fee framework and calculation took place which was used to understand costs of financing capital infrastructure for a set of improvements to a specified amount of development.
6.2 Relevant Projects

Ward 7 Action Summit

The consultant was asked by the newly elected Washington, DC Councilman in Ward 7, Vince Gray, to help him organize and conduct a day-long meeting with his constituents. The meeting was held on Saturday, December 3, 2016 at the KIPP DC Smilow Campus from 9:30 AM to 3:30 PM. The purpose of the meeting was to identify action priorities for Councilman Gray to help guide him during his time in office. In particular, Councilman Gray wanted input from the community on issues relating to housing, public safety, jobs, education, transportation and health care.

More than 250 residents and business owners in Ward 7 attended the meeting and there was a good cross section of people from various neighborhoods as well as key community organizations. Participants of all ages were part of the Action Summit including young people ages 16-25 who were particularly well represented. All of the participants spent the day learning about the issues, talking together in small groups, entering ideas into networked computers and voting with handheld key pads to determine what the action priorities for Ward 7 should be. Councilman Gray and his staff spent the entire meeting listening to the concerns and suggestions of those who attended and promised to act on what they heard. Immediately after the Ward 7 Action Summit, Councilman Gray took the data from the meeting and worked with his staff and others in the Ward to develop a comprehensive action plan. That plan was completed three weeks after the Action Summit and now serves as a guide for the work Councilman Gray is doing on the DC City Council.
6.2 Relevant Projects

**Project: Routing Assessment and Impact Analysis Related to School Time Changes**

**Pinellas County Schools**
Largo, FL

The overarching objective of this analysis was to determine how the routing structure could be revised to minimize the number of new resources necessary to support later high school start times. In addition to the performance of several analyses to determine an operational baseline, TPG performed several analyses to determine an optimal bell time structure to support school bell time changes. The primary finding was that PCS could change high school start times and extend the elementary instructional day by 10 minutes without severely impacting efficiency, cost, or service quality of PCS transportation operations.

**Project: Boundary Revision Impact Assessment**

**Cedar Rapids Community Schools**
Cedar Rapids, IA

The consultant was engaged by the Cedar Rapids Community Schools to perform two separate Boundary Revision Impact Assessments in 2012 and 2018. While the district is unlike Montgomery County in terms of district size and enrollment, the project was equally complex as the result of the potential closing of 8 of the district 21 elementary schools and a reduction in the eligibility walk boundaries. Using ArcGIS, TPG produced multiple illustrations to clearly show the impact of any proposed change on the education programs and the stakeholder community. The following Figure was used to illustrate student density for each of the elementary schools and provides one example of our analytical expertise in defining the impact of redistricting and boundary changes.

**Project: School Boundary & Transportation Impact Analysis**

**School District of Washington**
Washington, MO

The consultant was engaged by the School District of Washington to assess and recommend the new configuration of school attendance boundaries. The need for redistricting arose as the District prepared to add a new elementary school and retire a school that would no longer be utilized. The goals of this endeavor were to identify the best location for the new elementary school, equitably distribute students to best utilize school buildings and prevent overcrowding. In addition, TPG assessed the impact each of the new potential school alignments would have on transportation cost and students service quality by identifying the number of additional buses that would be needed to accommodate the new boundary alignment. The results of this study will be used as one of the factors to exhibit proof of due diligence by the District in showing how the location of the new school will impact the District as a whole.
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<td>7.0</td>
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<td>8.0</td>
<td>Mandatory Submissions</td>
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<td>Treatment of Technical Data in Proposal</td>
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7.0 Format of Response
The team acknowledges and complies.

8.0 Mandatory Submissions
The team acknowledges and complies with the mandatory format of submission. In case of discrepancy, and given the tight deadline of the submission, Consultant requests that the MCPS staff reach out for any clarification.

9.0 Treatment of Technical Data in Proposal
The team acknowledges and complies.

10.0 Proprietary & Confidential Information
The team acknowledges and complies.

11.0 Evaluation Criteria
The team acknowledges and complies.

12.0 Schedule of Events
The team acknowledges and complies.

13.0 Pre-Proposal Conference
Consultant attended the pre-proposal conference and complies with all the additional items discussed during the session.
14.0
Inquiries

The team acknowledges and complies.

15.0
Addenda/Errata

The team acknowledges and complies with the various issues addendum. Please refer to attachments at the end of the document for signed addendum documents.

16.0
eMaryland Marketplace

The team acknowledges and complies.

17.0
Multi-Agency Participation

The team acknowledges and complies.

18.0
Unnecessarily Elaborate Brochures

The team acknowledges and complies.

19.0
Bid Protests

The team acknowledges and complies.

20.0
Contract

The team acknowledges and complies.
# LUMP SUM RATES BY TASK

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<th>TASKS</th>
<th>All Inclusive Cost *</th>
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<td>Task 1 CONSULTANT ORIENTATION &amp; DATA ANALYSIS</td>
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<td><strong>Total</strong> (labor)</td>
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<td>Total Expenses- Traveling and printing costs as necessary for various part of the project</td>
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<td><strong>TOTAL (Task 1 - 5)</strong></td>
<td><strong>$473,800.00</strong></td>
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Task cost amended from July 15, 2019 submittal

**Notes**

1. Cost to include online tool license and development cost through our sub-consultant CARTO (https://carto.com/)

2. Cost reflects new engagement structure outlined under Task 4 of this document. Please note that engagement related costs such as cost of venue, refreshments, childcare, translation, direct outreach and recruitment, are not included in this cost structure.

We look forward to discussing the proposed fee with MCPS staff and refining the cost proposal specifics and scope of work as needed to provide the best value to MCPS.