

## **VI. SCOPE OF SERVICE AND PERFORMANCE REQUIREMENTS**

### **Term**

The agreement(s) resulting from this solicitation will be in effect for an initial term of two (2) years from the date established by the agreement. During the initial term, the consultant will conduct preliminary site and market due diligence activities, in addition to financial analysis of potential uses at sites, based on both market dynamics and community input. This preliminary visioning will result in recommendations for the District to pursue. The initial term will focus on three sites. The District may request analysis and recommendations for additional sites under an amended contract approved by the Superintendent with notice provided to the Board. The parties by mutual consent may renew the agreement for up to two (2) additional one (1) year periods. In addition, the district reserves the right to extend the contract for an additional time beyond the final expiration date if necessary to ensure no lapse in service. Feedback from the Board and community regarding site priority may impact the timing and breadth of sites undertaken.

### **Background**

The District is committed to working with the school communities to develop repurposing strategies for school properties. AISD recognizes that these sites are community assets, and each site will be evaluated to determine the highest and best use for the community but also what will serve the District best for future generations. The process will require robust community and stakeholder engagement, including neighbors, underserved groups, and community members with current or past ties to the sites. Engagement will begin with a survey and small focus groups to identify desired uses at the sites, which will inform detailed analysis and future planning for the repurposing of the properties.

To ensure decisions around these sites are made in the best interests of their local communities, AISD will follow the elements of the Board approved Repurposing Framework for Community Development starting with determining site suitability. The factors to be reviewed during the site suitability include but are not limited to;

- a) The environmental impact of any future use;
- b) The cost of any future use;
- c) The development impact of any future use to the community; and
- d) The allowable zoning and rezoning of the site.

AISD's priority is to implement the aforementioned framework in order to assess facilities by their ability to advance existing communities, make most efficient use of the current facility configuration and assure future uses are financially viable. While affordable (30%-60% MFI) and workforce (60%-80% MFI) housing will be prioritized, potential uses might also include but are not limited to, fine arts centers, vocational and shared working spaces, mixed-use community centers, childcare centers, and educational gardens. The project timeline will be milestone-driven, allowing flexibility for tasks to occur at a pace aligned with other District initiatives and priorities.

This solicitation is a request for proposals for services under Texas Education Code 44.031.

- 2117 W. 49<sup>th</sup> St., 78756
- 4900 Gonzales St. 78702
- Site to be scheduled at a later date

## A. Scope of Services

The scope of the site analysis, evaluation, and community engagement is intended to produce data- and community-driven recommendations to the District and Board for the reuse of each site. The entire program is a joint effort between the selected real estate consultant and the District. While this scope will rely solely on the expertise of the real estate consultant, activities will be completed in concert with significant stakeholder engagement activities led by the District. Activities will include, but not limited to, the following:

### a) Real Estate Analysis Services

- i. Provide current market value of select district-owned properties based on current land-use, zoning and redevelopment highest-and-best use options.
- ii. Identify and document current conditions of all existing district-owned structures, including the structural integrity, physical state of each building, and compliance with modern building codes.
- iii. Assess and identify whether each of the buildings are serving their intended role, and if they are under or overutilized in their current capacity.
- iv. Identify the replacement and/or renovation costs of each building and make recommendations as to which (if any) buildings should be renovated, replaced, etc., as needed.
- v. Identify any impediments with the sale or disposition of the property for the highest and best use intent.

Additionally, the Consultant is expected to meet with District staff to identify all reliable sources of existing data such as facility inventory lists, plans, maps, studies, etc. Where applicable, existing studies and reports will be provided to the consultant for incorporation into the final report. The types of building systems surveyed may vary with each building and shall include, but are not limited to, the following systems:

- **Site:** topography, drainage, access/egress, paving, curbing, parking, flatwork, utilities
- **Exterior Systems:** foundation, roofs, walls, window systems, exterior doors, civil/structural components
- **Fire/Life Safety Issues:** including hazards, alarms, and fire escapes
- **Heating, Ventilation, and Air Conditioning:** including controls and terminal units
- **Electrical:** including internal electrical distribution and backup generators (if applicable)

- **Plumbing Systems:** fixtures, supply, storm and sanitary sewer drainage, valving, irrigation
- **Fire Protection**
- **Specialized Construction and Outbuildings**
- **Specialized Equipment and Systems**

The consultant shall inspect all identified facilities to produce an accurate analysis that identifies all components and elements necessary to determine highest and best use valuation and any requiring maintenance, repair, and/or major capital investment that would reduce that valuation. The consultant will perform market analysis to determine a value range between low and high end of the property based on physical land only and a computation that includes improvements such as buildings and utilities, entitlements, etc. The physical and market analysis findings will be integrated with community feedback to continually pursue the project with an equity-based focus. The consultant will follow the State requirements and best practices for appraisal methodology. At a minimum consultant shall gather the following information on each property:

- i. **Property Characteristics:** an inventory of all building systems with each system component quantified as a count, an area, a length, and/or a height; whichever measurement is most appropriate for each system. Confirmation/validation of building area (square footage) shall be obtained during inspection.
- ii. **Age:** Identification/approximation of the year each system component was installed.
- iii. **Current Condition:** an assessment of the current condition of each system component and a determination of the level of repair necessary to restore or replace these components to achieve optimal condition.
- iv. **Facility Needs:** a summary of how each facility is being utilized, identifying whether it is over- or under-utilized and an analysis regarding the suitability of the facility to its current use.
- v. **Historical Review:** a review of the age of the properties and comparison to any applicable local, state, or federal registry. For the purpose of this report, system components shall be defined along with a standard list of repairs and action levels for inspectors to choose from in rating each system condition. Action level recommendations and timelines shall be defined for individual components. Standard definitions and systems of actions are intended to provide a more accurate assessment of facilities.

#### **b) Economic Analysis Services**

Economic Analysis Services are required to assist District Staff with accurate market data that can help in the development of realistic and effective plans, policies, and regulations. The District will need to determine equitable economic development priorities and further expand on place-based development strategies. Information about market forces will be used to test and shape potential development scenarios so that development parameters are in line with desired outcomes. Through an iterative process in concert with District-led stakeholder engagement

efforts, the economic analysis will be both informed by community recommendations and will inform financially feasible uses that can be relayed to stakeholders. Planning efforts may also include implementation measures focusing on funding opportunities that need to be identified. Economic Analysis Services may include, but not limited to:

- i. Estimating the market potential for various types of industrial, commercial, and housing sectors, and identifying market gaps. Market demand studies should concentrate on the types of businesses that have the greatest potential for growth and sustainability, and on testing the viability community-requested commercial uses;
- ii. Creating customized market analyses to assist the District in making informed recommendations;
- iii. Recommendations for developing housing at various affordability levels either as stand-alone projects or within mixed-use projects;
- iv. Feasibility analysis scenarios for specific projects with community benefits, as needed;
- v. Data analysis to support planning efforts presented in graphic formats such as maps and easy-to-understand diagrams and illustrations. Data should be structured in such a way as to feed into the District’s geographic information systems (GIS);
- vi. Evaluating opportunities for joint development (e.g. public/private partnerships)

**c) Community Engagement Services**

- i. Support outreach to communities adjacent to sites
  - a. Database additions
  - b. Phone calls to list to invite key stakeholders to meetings, engage in process
  - c. Block walking to promote meetings/input
  - d. Outreach to businesses in project area – door drop materials
- ii. Provide analysis of community meeting feedback
- iii. Support message development for materials including fliers, blogs
- iv. Assist project team in development of presentation materials for AISD team
- v. Assist with set up of [PublicInput.com](https://www.PublicInput.com) surveys and meetings
- vi. Assist with design needs, as requested

**B. Consultant Requirements**

The successful Consultant shall meet the following minimum requirements:

- a) Have been in business for at least five (5) years;

- b) Have managed at least three (3) projects of a similar size and scope for a governmental entity;
- c) Demonstrated in depth knowledge and expertise in one or more of the following areas:
  - i. Real Estate and Planning Advisory Services- Including, but not limited to, firms that can perform:
    - 1. Equitable Development Analysis
    - 2. Land Use and Zoning Analysis
    - 3. Commercial Real Estate Advisory Services
    - 4. Real Estate Market Research
    - 5. Real Estate Financial Analysis
    - 6. Appraisal and Valuation Services
    - 7. Technical Advice and Due Diligence
    - 8. Site Selection
  - ii. Financial and Economic Analysis- Including, but not limited to, firms that can perform:
    - 1. Affordable and Workforce Housing Analysis
    - 2. Economic Feasibility Analysis
    - 3. Economic Impact Analysis
    - 4. Cost/Benefit Analysis
    - 5. Regulatory Analysis and Review
    - 6. Due Diligence Analysis
  - iii. Historic Preservation and Adaptive Reuse- Including, but not limited to, firms that can perform:
    - 1. Condition Assessments
    - 2. Historic Structure Report Services

### **C. Reporting, Evaluation and Key Performance Measures**

The District's Contract Manager will be responsible for exercising general oversight of the Consultant's Scope of Work activities. The District and consultant will work collaboratively on key aspects of the project, including stakeholder engagement. District's Contract Manager shall specifically:

- a) Provide successful Consultant access to relevant District contacts, data and documents including reports as available;

- b) Collaborate with the Consultant and other relevant entities to obtain sustained participation and support by stakeholder audience including internal and external staff or private sector, and the Board;
- c) Provide contact information and/or coordination within District departments, as needed;
- d) Provide logistical and coordination of stakeholder engagement support;
- e) Participate in conference calls or meetings for status reporting, as scheduled;
- f) Provide and cover printing costs associated with meeting materials and reports;
- g) Provide timely feedback in order to maintain the established timeline; and
- h) Approve all invoices for payment in a timely manner, as appropriate.
- i) Coordinate the District’s stakeholder engagement activities and share results with consultant, as needed.

Executive Summary of findings and recommendations including the following areas of review:

- a) Strategic drivers for the site and analysis
- b) Creative and organized land-use plan for the site by parcel / area, utilizing the following detailed analyses
- c) Market based demand for asset types to be developed on site
- d) Concept development standards and sample imagery for each parcel / area
- e) Cost modeling and estimates for each parcel / area including all project related costs (inclusive of demolition, renovation, site work)
- f) Development / asset type options recommended and projected planning and financial potential for parcel / each area (including on connections to strategic drivers and CPP mission)
- g) Highest-and-best use analysis for each parcel / area
- h) Stakeholders to engage for each parcel / area (CPP, municipalities, state agencies, transit authorities, etc.)
- i) Risk evaluation for each parcel / area based on CPP strategic drivers, market demand, development opportunities, revenue streams, needed stakeholders, etc.
- j) Inventory of structures on site (size, age, replacement cost, hazardous materials, etc.)
- k) Market study data
- l) Equity analysis to assess the alignment of proposed uses with needs and desires identified by the community