

Scope of Work (SOW)
PSFA Adequacy Planning Guide for Public Schools
Comprehensive Revision

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1. Background / Purpose

The Adequacy Planning Guide (APG) provides guidance for school districts seeking state capital funding for facilities from the Public School Capital Outlay Council (PSCOC). The APG incorporates New Mexico’s Statewide Adequacy Standards and informs the Maximum Allowable Gross Square Foot (GSF) Calculator. The GSF Calculator helps districts determine the appropriate size of a school based on programmatic and enrollment requirements. (Key terms used in this Scope of Work are defined in **Appendix A.**)

Existing space allocations in the APG do not necessarily reflect current educational practices or emerging programs, such as Career Technical Education (CTE), early childhood education, special education, wellness, and others. They also do not consistently account for community needs or shared use of school facilities, such as playgrounds, gyms, or other spaces that may host social services, recreational activities, or other community functions. As a result, the APG, Standards, and GSF Calculator require periodic review to remain aligned with evolving programmatic needs.

The purpose of this project is to comprehensively review and update the APG, Adequacy Standards, and GSF Calculator to ensure they are aligned with current educational practices, emerging programs, and statewide needs. This work will clarify statutory adequacy requirements, distinguish them from planning guidance and best practices, and improve the clarity, consistency, and usability of these tools for school facility planning in New Mexico.

This Scope of Work defines the services, tasks, deliverables, and engagement requirements for a qualified, multi-disciplinary consulting team (“Consultant”) to perform this work on behalf of the New Mexico Public School Facilities Authority (PSFA). It establishes the framework under which the selected Consultant will conduct the review, engage stakeholders, develop recommended updates, and deliver integrated, implementable products for PSFA’s use.

2. Consultant Objectives

The Consultant will work closely with the PSFA Project Manager to ensure that:

- The Adequacy Standards reflect current national best practices in education, emerging programs, and community needs across New Mexico’s public schools, including constitutional schools (i.e., the New Mexico School for the Deaf, the New Mexico School for the Blind and Visually Impaired, and the New Mexico Military Institute).
- The APG provides clear, intuitive, and user-friendly guidance and defined parameters for design flexibility within the constraints of the Adequacy Standards, the Maximum Allowable GSF Calculator, and cost considerations. Content will be organized for quick reference, rather than presented as a dense, text-heavy narrative.
- The APG incorporates purposeful visual elements (e.g., diagrams, decision-support graphics) that support and clarify written guidance, speeding comprehension and practical application.

- The GSF Calculator is redesigned as a transparent, program-driven tool aligned with the APG and Adequacy Standards, supporting accurate space planning, O&M cost estimation, staffing needs estimation, and scenario testing.
- The Adequacy Standards and APG clearly identify and distinguish statutory adequacy requirements from recommended or best practice guidance and include recommendations for statutory amendments where appropriate.

The Consultant’s work will include:

- Engaging stakeholders robustly across all phases of the project.
- Evaluating existing and new space types.
- Promoting cost-efficient design while maintaining high quality.
- Redesigning the APG to reduce text dependence and improve visual clarity.
- Redesigning the GSF Calculator.
- Incorporating maintenance cost and staffing estimates into the GSF Calculator.
- Providing guidance on APG implementation and update cycles.
- Developing APG training materials.

The Consultant will be accountable to the PSFA Project Manager, who will serve as the primary point of contact and decision-maker for the project. The PSFA Project Manager will work closely with an internal PSFA team called the APG Working Group, who will provide guidance throughout the project.

The Consultant shall propose a Stakeholder Engagement Specialist (“SES”) for PSFA approval, or PSFA may select the individual directly if the proposed candidate is not accepted. The SES will be a key member of the project team, responsible for safeguarding the public interest and ensuring neutrality, transparency, and ethical integrity throughout the planning process. The SES must be perceived as credible and independent by all participants.

The SES shall have authority to raise concerns, provide independent input, escalate issues directly to the PSFA Project Manager, and challenge the Consultant Project Manager where necessary to preserve neutrality and alignment with the public interest. The SES shall operate, to the maximum extent practicable, independently from the Consultant team.

The SES will develop and implement a Stakeholder Engagement Plan aligned with project tasks, in coordination with the Consultant Project Manager to ensure integration with deliverables. The Consultant Project Manager shall cooperate with the SES and the PSFA Project Manager to ensure engagement activities are transparent, ethical, and well-coordinated. In the event of a substantive disagreement between the SES and the Consultant Project Manager, the PSFA Project Manager shall have final decision-making authority.

PSFA reserves the right to approve or replace any member of the consulting team at its discretion to ensure alignment with project goals, the public interest, and the integrity of stakeholder engagement.

3. Consultant Qualifications

The Consultant team will bring national experience and best practices in school facility planning and design, combined with knowledge of New Mexico’s diverse communities. The team must meet the qualifications and experience requirements outlined in **Appendix B**.

The team must demonstrate expertise in translating educational programs into well-designed facilities, drawing on national best practices in school planning and design. This includes experience with a variety of facility types—classrooms, laboratories, gyms, performance spaces, Career Technical Education (CTE) areas, and others—and the ability to align facility design with both programmatic and enrollment needs cost-effectively.

At least one team member must possess relevant knowledge of New Mexico, including its diverse communities, history, governance structures, economy, and education system, to inform school space needs, community priorities, and practical design approaches.

The Consultant team must also demonstrate:

- Experience producing clear, visually effective, and methodologically sound planning documents and tools.
- Ability to design and conduct structured, iterative stakeholder engagement processes aligned with the project’s Engagement Rounds.
- Experience evaluating existing spaces, designing standards, and integrating emerging educational programs into facility guidance.

4. Consultant Ethics and Conflict of Interest

To maintain impartiality and public trust, no member of the Consultant team may have a financial or other interest in projects that could improperly benefit from this work. Firms or individuals with potential conflicts related to the APG, Adequacy Standards, or GSF Calculator updates must establish and maintain ethical walls to prevent conflicts of interest. PSFA retains authority to determine whether a potential conflict exists and may disqualify any firm or individual if a conflict could compromise the impartiality or credibility of the APG update process.

This approach ensures the APG update is conducted objectively in the public interest, while remaining defensible as a fair and equitable method for statewide school facility planning. (See Section 5.A.3 for more information.)

5. Consultant Tasks / Scope

Overview of Work: The Consultant shall perform the work under this Scope of Services as a coordinated, multi-phase effort structured around nine (9) tasks, identified as Tasks A through I. These tasks collectively define the activities necessary to review, evaluate, and update the Adequacy Planning Guide (APG), align it with the Statewide Adequacy Standards, and redesign the Maximum Allowable Gross Square Foot (GSF) Calculator, while incorporating robust stakeholder engagement

and national best practices. One task (Task I) is optional and may be authorized at PSFA's discretion based on project needs, proposal quality, and available budget.

Scope Boundaries: The tasks described below define the Consultant's scope of services. Unless expressly authorized in writing by PSFA, the scope does not include site-specific architectural or engineering design services; preparation of construction documents; detailed project-level cost estimates beyond the high-level analyses described in this Scope of Work; direct participation in funding decisions for individual capital projects; or legislative advocacy. No formal legal analysis or interpretation of statute is required, though the Consultant will be expected to identify policy-level statutory constraints and potential amendment concepts.

Baseline Schedule Framework: This project is anticipated to be completed within an approximate time span of twelve (12) to eighteen (18) months from Notice to Proceed. Tasks are expected to proceed in a logical sequence, with research and evaluation informing subsequent drafting, tool development, and implementation guidance. A detailed task-level schedule, milestones, and engagement timing shall be proposed in the Refined Scope of Work (RSOW) and are subject to approval by the PSFA Project Manager. All deliverables shall comply with the requirements described in **Appendix C** (General Deliverable Requirements).

Task Iteration and Interdependence: The tasks are intended to be iterative and interdependent, with findings, stakeholder input, and analysis from earlier tasks informing subsequent phases. Through this approach, the Consultant shall deliver comprehensive, transparent, and implementable updates that reflect the diverse needs of New Mexico's public schools and support effective, equitable, and forward-looking facility planning, subject to direction and final approval by the PSFA Project Manager.

Compliance with Statutory Requirements: The Consultant shall ensure that proposed updates to the APG and related guidance are generally consistent with current statutory requirements. Where the planning process identifies recommendations inconsistent with statute, the consultant shall document these items and develop a corresponding list of potential statutory amendments for consideration by PSFA, PSCOC, and the State Legislature. This directive applies to all tasks.

Background Materials and Confidentiality: PSFA will provide available background materials, including the current APG, Adequacy Standards, GSF Calculator, and relevant prior studies and data. The Consultant shall handle all data, draft materials, and communications developed under this Scope of Work in accordance with PSFA confidentiality requirements and the New Mexico Inspection of Public Records Act (IPRA) and shall not release or disclose any project materials without the prior approval of the PSFA Project Manager.

Ownership of Work Products: All work products developed under this Scope of Work, including narratives, analyses, tools, models, calculators, methodologies, data compilations, and visual materials, are the property of PSFA.

Transition Recommendations: The Consultant shall identify and document recommendations for transitioning from the current APG, Adequacy Standards, and GSF Calculator to the updated versions, including considerations for projects already in funding review, planning, or design at the time of implementation.

Task A. Manage the Project

The Consultant will provide overall project management from Notice to Proceed (NTP) through project closeout. This task will include coordination of all project activities, schedule and budget management, internal team oversight, quality control, documentation, and delivery of all required work products.

The Consultant will designate a Consultant Project Manager who will serve as the Consultant's primary representative and single point of contact for day-to-day coordination. The Consultant Project Manager will be responsible for coordinating all members of the Consultant team, managing subconsultants, and ensuring that all work is completed in accordance with the requirements of this SOW, approved schedules, and direction provided by the PSFA Project Manager.

The Consultant shall make reasonable efforts to maintain continuity of key project personnel identified in its proposal. Any proposed changes to the Consultant Project Manager or other key staff shall be submitted to the PSFA Project Manager for review and approval, along with a description of how project continuity will be maintained.

The PSFA Project Manager will serve as the primary point of contact and decision-maker for PSFA, to whom the Consultant team will be accountable. The APG Working Group will provide guidance and advice. All project communications, requests for approval of deliverables, and approval of major decisions will flow from the Consultant Project Manager to the PSFA Project Manager, ensuring a clear chain of responsibility and accountability.

A.1 *Develop a Refined Scope of Work*

Within twenty (20) business days of NTP, the Consultant will prepare and submit a Refined Scope of Work (RSOW) for review and approval by the PSFA Project Manager. The RSOW represents the finalized approach, tasks, deliverables, schedule, and responsibilities, based on the Consultant's proposed methods and reconciled with this SOW and available budget resources. As part of the RSOW, the Consultant shall identify essential versus optional tasks and deliverables, providing recommendations for adjustments if budget constraints limit full execution of the SOW.

The RSOW will clarify and expand upon the requirements of this SOW, reflecting the Consultant's proposed approach while aligning with project objectives and stakeholder expectations. The Consultant's approach must emphasize robust, statewide stakeholder engagement across all project phases. The APG update process will proceed in iterative cycles of engagement, synthesis, analysis, and review to produce final deliverables reflecting the needs of New Mexico's public schools, including constitutional schools, and integrate national best practices with local knowledge.

At a minimum, the RSOW will include:

- Project Management Approach – governance structure, communication protocols, schedule, and statewide engagement strategy.

- Project Assumptions and Constraints – Identification of key baseline assumptions, constraints, and parameters governing the work (including data sources, statutory bounds, cost and funding considerations, and analytical limitations), for review and approval by the PSFA Project Manager.
- Detailed Project Schedule – phases, milestones, iterative stakeholder engagement cycles, and deliverable submission dates. The project schedule shall identify key task dependencies and critical decision points, and describe how delays in one task or engagement round may affect the subsequent work and deliverable timing.
- Work Breakdown Structure (WBS) – tasks, subtasks, responsible team members, and associated deliverables.
- Proposed Refinements or Deviations – any changes to this SOW, with justification.
- Initial Identification of Project Risks – including any assumptions made and proposed strategies for managing or mitigating them.

The RSOW will serve as the authoritative reference for project execution and ensure alignment among the Consultant, PSFA, and stakeholders. Any material changes to scope, level of effort, or sequencing identified after approval of the RSOW shall be documented and addressed through a mutually agreed refinement consistent with PSFA direction.

A.2 Develop a Stakeholder Engagement Plan

Within twenty (20) business days of NTP, the Engagement Specialist will work cooperatively with the Consultant Project Manager to prepare and submit a detailed Stakeholder Engagement Plan (SEP) for review and approval by the PSFA Project Manager, with the Consultant Project Manager responsible for ensuring alignment of the SEP with overall project scope, schedule, and deliverables.

The SEP shall establish a structured and iterative engagement process integrated across all project tasks. Activities will occur in coordinated engagement rounds aligned with the development of work products under Tasks B through I. Stakeholder input shall inform analysis, evaluation, drafting, refinement, and finalization of the APG, Adequacy Standards alignment, GSF Calculator redesign, guidance materials, and training resources.

This engagement process will be organized into a series of structured “Rounds,” as described in **Appendix D**, including purpose, sequence, and participant expectations. The Engagement Specialist and Consultant Project Manager shall work cooperatively to ensure that all engagement activities are clearly aligned with these defined Rounds.

The Stakeholder Engagement Plan shall include provisions for reasonable accommodations and auxiliary aids and services, including sign language or oral language interpretation and other communication supports, to ensure accessibility and compliance with applicable ADA requirements upon request.

PSFA recommends the engagement structure shown in **Appendix D** as a baseline approach to ensure statewide, robust stakeholder participation with iterative feedback. Respondents may follow

this approach or propose an alternative structure that achieves these objectives, including statewide reach, in-person participation, iterative engagement, and a final Plenary Round.

The SEP shall clearly demonstrate how the Consultant will achieve robust, statewide participation across all Engagement Rounds.

A.3 *Ensure Compliance with Ethical Standards*

The Consultant shall ensure compliance with ethical standards throughout the APG revision process, to prevent conflicts of interest. This task will require the Consultant team to maintain transparency, impartiality, and integrity at all stages of the project, especially in the development of recommendations and engagement with stakeholders.

The work will involve:

1. Reviewing all potential conflicts of interest for members of the Consultant team and ensuring that no team member has a financial or professional interest in projects that could benefit improperly from the APG update.
2. Establishing and maintaining ethical walls, as necessary, to prevent any consultant team member from influencing the APG process based on outside business interests.
3. Providing a statement of compliance with conflict-of-interest policies, including how potential conflicts are identified and mitigated.
4. Monitoring and reporting on adherence to ethical guidelines throughout the project lifecycle, ensuring that all stakeholder interactions are conducted transparently and without bias or influence from external interests.
5. Documenting and addressing any concerns raised by stakeholders regarding conflicts of interest or ethical issues, providing transparent resolutions.
6. Ensuring that all deliverables and recommendations are based solely on the best available data, stakeholder input, and national best practices, and are not influenced by external interests.
7. Promptly disclosing any actual or potential conflicts of interest identified during the course of the project to the PSFA Project Manager.

A.4 *Implement Quality Control and Assurance Procedures*

Within twenty (20) business days of NTP, the Consultant will prepare and submit a project-specific Quality Control (QC) Plan to ensure technical accuracy, internal consistency, transparency, and completeness of all deliverables. The QC Plan will include, at a minimum:

- Identification of a designated Quality Control Lead responsible for oversight of QC activities.

- Internal review procedures and defined review milestones prior to submission of each major deliverable.
- Version control, documentation, and recordkeeping protocols.
- Procedures to verify alignment among the APG, Adequacy Standards, and the GSF Calculator.
- Validation procedures for all GSF Calculator formulas, assumptions, maintenance cost inputs, and staffing cost estimates.
- Documentation standards for capturing, synthesizing, and incorporating stakeholder input.
- A final compliance review process to confirm that each deliverable meets RSOW requirements prior to submission.

The Consultant will implement the approved QC Plan throughout the duration of the project and will summarize QC activities in Monthly Project Management Reports. (See Section 5.A.5 for more information.) Deliverables may be returned for revision if they do not comply with the approved QC Plan or the requirements of this SOW and the RSOW.

A.5 *Manage Project Execution*

The Consultant Project Manager will oversee all aspects of project execution, including:

- Coordinating all Consultant team members and subconsultants.
- Facilitating Monthly Project Management Meetings with the PSFA Project Manager and APG Working Group.
- Preparing and submitting monthly progress reports to the PSFA Project Manager, including schedule, budget, ethical compliance, quality control activities, and upcoming tasks. Monthly progress reports shall also include updates to identified project risks, potential impacts, and mitigation strategies, with adjustments as conditions change.
- Maintaining internal budget tracking and cost control procedures.
- Documenting key decisions, action items, and approvals.
- Promptly elevating issues requiring direction or decision to the PSFA Project Manager, who retains final authority on interpretation of this Scope of Work, acceptance of deliverables, and resolution of substantive issues.
- Preparing and submitting required closeout documentation at the conclusion of the project.

The Consultant Project Manager shall maintain proactive communication with the PSFA Project Manager to ensure timely identification and resolution of issues affecting scope, schedule, budget, or deliverables.

All deliverables submitted by the Consultant shall be subject to review and acceptance by the PSFA Project Manager. Unless otherwise agreed in writing, PSFA will provide consolidated comments or notice of acceptance with twenty (20) business days of receipt of a deliverable. The Consultant shall address PSFA comments and resubmit revised deliverable within a mutually agreed timeframe. Acceptance shall be indicated by written approval from the PSFA Project Manager. Reasonable revisions necessary to achieve acceptance are considered part of the Consultant's scope of services.

Task A Deliverables:

- Refined Scope of Work (RSOW) – submitted within 20 business days of NTP
- Project Schedule and Milestones – submitted with the RSOW and updated as needed
- Quality Control (QC) Plan – submitted within 20 business days of NTP
- Stakeholder Engagement Plan (SEP) – submitted within 20 business days of NTP, including an Engagement Tracking Framework for documenting input and participation
- Statement of Ethical Compliance (SEC) – formal statement from the Consultant affirming adherence to ethics and conflict-of-interest requirements, including a summary of any identified conflicts and steps taken to mitigate them
- Meeting Documentation – submitted no later than 3 business days after each meeting, including agendas, attendance, key decisions, and action items
- Monthly Progress Reports – submitted to the PSFA Project Manager, including schedule, budget, risks, quality control activities, and upcoming tasks
- Monthly Ethical Oversight Reports – submitted to the PSFA Project Manager, documenting adherence to ethical standards and any identified issues or corrective actions
- Conflict-of-Interest Log – a maintained log documenting any potential conflicts identified during the project and how each was addressed
- Consolidated Project Record – a documentation of key decisions, assumptions, analytical frameworks, stakeholder input themes, and issue resolutions made available to PSFA as part of the regular monthly reporting cycle and provided in final form at project closeout.
- Closeout Documentation – submitted at project closeout, in accordance with RSOW requirements

Task B. Review Existing APG, Standards, and GSF Calculator

The Consultant shall review and summarize the current Adequacy Planning Guide (APG), Statewide Adequacy Standards, and Maximum Allowable GSF Calculator to establish a clear baseline of existing content, structures, and methodology.

The work will involve:

- Cataloging and describing all current APG content, including space allocations, eligibility criteria, and guidance language.
- Reviewing the existing APG, Standards, and any other relevant state statutes, for gaps related to climate adaptation and mitigation, including school bus and personal vehicle electrification, renewable energy generation, and site selection best practices addressing fire and flood risks.
- Documenting the structure and methodology of the GSF Calculator.
- Summarizing statutory adequacy requirements, including how they inform space requirements and design considerations and how they are incorporated into the APG.
- Compiling materials from workshops and engagement activities conducted before project initiation (including notes, surveys, presentations, etc.) to document past stakeholder input.
- Organizing findings in clear formats to support analysis and stakeholder engagement.

Task B Deliverables:

- Existing Conditions Summary Report: Summary of APG content, Adequacy Standards, and GSF Calculator methodology, including prior stakeholder input and identification of areas for further evaluation in subsequent tasks.
- Internal Findings Brief: Prepared for Consultant and PSFA use, summarizing key observations and contextual information for subsequent tasks.

Task B Stakeholder Engagement:

- Round 1: Stakeholder input from workshops and engagement activities conducted before project initiation shall be compiled for reference under Task B. Round 1 stakeholder input shall be recorded for reference but not evaluated or acted upon in this task.
- Round 1: Findings from Task B shall inform materials and presentations in Round 2, when stakeholders review the current APG, Adequacy Standards, and GSF Calculator.

Task C. Synthesize Best Practices and Emerging Educational Programs

The Consultant shall synthesize national best practices in school facility planning and emerging educational programs to inform the APG update. The work will establish benchmarks and reference examples relevant to New Mexico’s diverse school contexts.

The work will involve:

- Researching current national guidance, standards, and trends for school facilities, including academic spaces, Career Technical Education (CTE), Pre-K/early childhood, wellness, performing arts, special education, residential uses (e.g., dormitories and staff/teacher housing, where applicable), outdoor lighting/night-sky protection practices, school transportation access (including walking and bicycling), and facility planning and site integration considerations for electric school bus charging infrastructure.
- Identifying innovative approaches to space allocation, program integration, and design flexibility that align with evolving educational practices.
- Reviewing national and state-level approaches to the use of prototype school designs, including common-core, kit-of-parts, or repeatable planning models, as a means of improving cost control, schedule predictability, and operational efficiency, and assessing their applicability to New Mexico contexts.
- Identifying trends in climate-responsive school design, including HVAC, passive environmental strategies, renewable energy integration, vehicle electrification (EV/bus) infrastructure, and hazard-resilience -- particularly in regions experiencing increased temperatures, changing seasonal conditions, extreme weather events (e.g., heavy rainfall, dust storms), and elevated wildfire and flood risks.
- Reviewing best practices for site selection and campus layout to reduce exposure to climate hazards such as wildfire, flooding, and extreme heat, while supporting safe multimodal access and minimizing infrastructure and lifecycle costs.
- Identifying best practices to support safe walking and bicycling to school, including site design, circulation, and connections to surrounding neighborhoods.
- Documenting methodologies, assumptions, and performance metrics used in other states or districts for space planning, sizing, and cost estimation.
- Synthesizing findings concisely, highlighting practices relevant to New Mexico schools.
- Preparing materials to support stakeholder engagement in Round 2 and Round 3.

Task C Deliverables:

- National Best Practices White Paper: Summarizing research on relevant school facility planning trends, emerging programs, innovative space use, strategies to reduce school O&M

costs, and climate-responsive strategies, including energy efficiency, renewable energy integration, and active transportation.

- Reference Materials for Stakeholders: Condensed examples and visual aids to support engagement sessions and discussions.

Task C Stakeholder Engagement:

- Round 2: Findings will be presented to stakeholders alongside the current APG, Adequacy Standards, and GSF Calculator to provide context and stimulate discussion about applicability in New Mexico.
- Round 2: The Consultant shall document stakeholder feedback on national examples, including climate-responsive and sustainability practices, for use in subsequent tasks.

Task D. Evaluate Existing and New Spaces

The Consultant shall evaluate existing spaces described in the current APG and relevant reference facilities to assess alignment with educational programs, emerging needs, and the Adequacy Standards. The work will provide a factual foundation for subsequent APG updates, ensuring that all evaluations are documented and clearly linked to stakeholder engagement.

The work will involve:

- Assessing existing spaces described in the APG and reference materials, including classrooms, laboratories, gyms, performance arts facilities, CTE spaces, Pre-K classrooms, wellness areas, other specialized spaces, residential uses (e.g., dormitories and staff/teacher housing, where applicable).
- Identifying potential new spaces needed to support emerging programs, community partnerships, or shared-use facilities, such as cultural classrooms, central kitchens, outdoor learning areas, mental health rooms, and others, and ensuring that proposed spaces reflect climate-responsive and hazard-resilient design considerations.
- Evaluating how existing spaces and building systems perform under changing environmental conditions driven by climate change—such as longer summers, abrupt seasonal transitions, increased wildfire risk, and heightened flood exposure—and identifying implications for space planning and design, such as passive environmental control, HVAC adaptation, energy efficiency, vehicle electrification (EV/Bus), and onsite renewable energy integration.
- Evaluating site selection and campus layout, including exposure to hazards and implications for infrastructure extension and relocation costs, as well as site design considerations such as outdoor lighting and night sky preservation.
- Evaluating multimodal access and circulation across all modes, including walking, bicycling, buses, and automobiles. Assess pedestrian and bicycle access in terms of safety, comfort, and usability through site design and connections to surrounding neighborhoods.

- Evaluating site and operational considerations associated with personal vehicle and electric school bus charging where relevant.
- Evaluating space alignment with Adequacy Standards and programmatic needs, including space utilization, classroom sizes and configurations, and flexibility.
- Evaluating operational implications of space types and planning decisions, including cost and staffing.
- Documenting each space’s characteristics, including size, function, utilization, accessibility, and alignment with current Adequacy Standards, and evaluating whether existing APG space allocations and GSF Calculator methodologies appropriately:
 - Accommodate the full range of enrollment sizes, especially very small and very large schools
 - Support programmatic needs (e.g., CTE, Pre-K, special education, wellness)
 - Provide appropriate classroom sizes and configurations
 - Promote effective space utilization and flexibility
 - Reflect operational implications (cost and staffing)
 - Address student access and circulation by all modes, including walking and bicycling
- Synthesizing observations into a structured evaluation report highlighting patterns, opportunities, and areas for further analysis, including climate-responsive strategies and multimodal access considerations.
- Preparing materials to support stakeholder engagement in Rounds 2 and 3, including visual aids, tables, and summaries that allow stakeholders to review evaluations and provide input on space priorities.

Task D Deliverables:

- Existing and New Space Evaluation Report: Summarizing space characteristics, utilization, and alignment with educational programs and Adequacy Standards, including sections addressing climate-responsive strategies, operational implications (cost and staffing), and student access and circulation (including walking and bicycling).
- Stakeholder Engagement Materials: Visuals, tables, and summaries to facilitate discussion in engagement sessions, highlighting space performance and program alignment, operational implications (cost and staffing), climate-responsive strategies, and student access and circulation by all modes (including walking and bicycling).

Task D Stakeholder Engagement:

- Round 3: Present the findings of Task D, including a summary of existing and new space evaluations, highlighting alignment with educational needs and identifying any gaps or areas for improvement. Stakeholders will review these evaluations and provide feedback on space priorities, which will inform the revisions to the APG. Include discussion of climate adaptation

strategies, energy efficiency, EV infrastructure, renewable energy options, and multimodal access approaches.

- Round 4: Present a refined summary of Task D findings, integrating initial feedback from Round 3. Include visual aids and detailed tables to clarify space requirements for emerging programs. Stakeholders will provide further input, which will help shape the final updates to space allocations and program guidance in the APG. Ensure climate adaptation, sustainability, and multimodal access are clearly represented for final feedback.
- Feedback Integration: All stakeholder input from Rounds 3 and 4 will be documented and used to refine the evaluation of space needs, guiding the revisions of the APG and the associated standards. Explicitly track input related to climate adaptation, renewable energy, EV infrastructure, and multimodal access for incorporation into final recommendations.

Task E. Develop Integrated Report on Existing Conditions, Best Practices, and Space Evaluation

The Consultant shall prepare a comprehensive report synthesizing the outputs from Tasks B, C, and D. This report will document the statutory requirements incorporated in the APG, identify gaps or inconsistencies, and highlight opportunities to incorporate best practices without necessarily creating new statutory obligations. Where the evaluation identifies items that may require changes to statute, the Consultant shall develop a list of potential statutory amendments for consideration.

The report shall evaluate and describe how proposed findings, space standards, and methodologies perform across diverse contexts, including very small and very large districts, rural and remote communities, urban settings, tribal contexts, and districts with limited staffing and operational capacity. It shall also identify opportunities for improved multimodal access and circulation, as well as opportunities for climate adaptation and mitigation, including energy efficiency, passive environmental control, HVAC adaptation, vehicle electrification (EV/bus), renewable energy integration, and site selection best practices addressing fire, flood, and extreme heat risk.

Finally, the report shall identify and describe the capital, operational, and staffing cost implications of potential changes to space standards or planning guidance, including trade-offs relevant to districts of differing size, location, and capacity as well as implications of prototype or repeatable planning and design approaches.

Task E Deliverables:

- APG Statutory and Best Practice Summary Report, including a dedicated section on multimodal access, climate-responsive strategies, sustainability considerations, and, where applicable, discussion of prototype or repeatable school planning approaches as non-statutory guidance.
- Proposed statutory amendments (where appropriate), including how amendments could enable or facilitate improved multimodal access, climate adaptation, and decarbonization measures in school facilities.

Task E Stakeholder Engagement:

- Round 3: Present preliminary synthesis of statutory requirements and best practices emerging from Tasks B, C, and D. Facilitate discussion to confirm accuracy of interpretations, identify any gaps or inconsistencies, and gather stakeholder input on the distinction between statutory requirements and recommended practices. Include discussion of multimodal access, climate adaptation, energy efficiency, EV infrastructure, renewable energy opportunities, and site selection considerations to inform feasibility and priorities.
- Round 4: Present a refined summary of the statutory and best practice synthesis, including any identified gaps and potential statutory amendment considerations. Stakeholders will review and provide feedback to confirm clarity, completeness, and alignment with educational and community needs. Ensure multimodal access and climate-responsive measures are clearly highlighted to confirm stakeholder alignment.
- Feedback Integration: All stakeholder input from Rounds 3 and 4 will be documented and incorporated into the final APG Statutory and Best Practice Summary Report and any associated recommendations. Stakeholder input related to multimodal access, climate adaptation, renewable energy, and electrification shall be explicitly tracked and incorporated into recommendations where appropriate.

Task F. Redesign the APG for Usability

This task will focus on creating a user-friendly guide that is visually clear, easy to navigate, and accessible to stakeholders, including school district officials, architects, planners, engineers, PSFA staff, PSCOC members, and others. The Consultant shall redesign the APG to improve its alignment with updated Adequacy Standards, emerging program needs, climate adaptation and mitigation strategies, and best practices for Safe Routes to Schools. The redesigned APG shall clearly distinguish statutory adequacy requirements from PSFA planning guidance and best-practice standards, while presenting both as integral components of sound, defensible school facility planning rather than as mandatory versus optional elements. Where informed by prior tasks, the redesign may also reference prototype or repeatable school planning and design approaches as optional frameworks to support cost-effective, flexible facility construction across varying district contexts.

The work will involve:

- Reviewing feedback from Rounds 2, 3 and 4 of stakeholder engagement to ensure that the APG redesign addresses key concerns, aligns with priorities, and is clear and usable across different user groups, including climate-responsive considerations such as energy efficiency, passive cooling/heating, HVAC adaptation, EV infrastructure, renewable energy, and site selection best practices related to climate risk.
- Reorganizing the APG content and structure for improved readability and navigability, ensuring that critical information is easy to locate and understand.
- Incorporating visual elements (such as axonometric views, floor plans, tables, and graphs) to clarify space allocations, design parameters, and calculations. The visual design should support the user's ability to quickly interpret and apply the information, including energy

performance metrics, projected savings from efficiency measures, and climate-responsive design features.

- Ensuring that design revisions allow for flexibility while adhering to updated Adequacy Standards, including provisions for emerging programs (CTE, Pre-K, wellness, performance arts, etc.) and the integration of climate adaptation and mitigation strategies, as well as Safe Routes to Schools concepts.
- Incorporating, where appropriate, explanatory guidance or illustrative examples describing prototype or repeatable school planning approaches, clearly identified as optional planning tools and differentiated from statutory adequacy requirements.
- Creating clear guidelines for using the GSF Calculator within the APG, including how the calculator’s inputs, assumptions, and results align with space allocations, program needs, and potential energy or cost savings from adaptive and decarbonization strategies (e.g., EV buses, renewable energy, HVAC modifications).
- Drafting a usability testing plan to verify that the redesigned APG is intuitive, accessible, and practical for the intended audience, including review of climate-responsive content and sustainability guidance.

Task F Deliverables:

- Redesigned APG Draft: A revised version of the APG, reorganized for usability, and incorporating stakeholder feedback from Rounds 1 through 4 as well as visual aids to clarify complex information; highlight climate adaptation, energy, and decarbonization measures; illustrate Safe Routes to Schools concepts; and, where relevant, show prototype or repeatable school planning and design approaches.
- Usability Testing Plan: A plan for testing the redesigned APG, including stakeholder feedback and suggested changes, with attention to the clarity and applicability of climate-responsive and sustainability features.
- Stakeholder Feedback Summaries: A summary of feedback on the redesigned APG from Rounds 3 and 4, with recommendations for further refinement, including feedback on climate and energy measures.

Task F Stakeholder Engagement:

- Round 3: Present a first draft of the redesigned APG to stakeholders, focusing on its usability and clarity. Solicit feedback on the organization, design, and effectiveness of visual elements. Ensure that the updated APG meets the needs of a diverse user base, including questions about the understandability and applicability of climate adaptation and mitigation strategies.
- Round 4: Present the near-final APG to stakeholders for final confirmation that all revisions align with stakeholder priorities and expectations. Gather feedback on final adjustments

before the APG is finalized, with attention to climate-responsive and decarbonization elements.

- Feedback Integration: All feedback from Rounds 3 and 4 will be documented and used to finalize the APG design, ensuring that it is both functional and aligned with emerging needs, and clearly communicates climate adaptation and sustainability guidance.

Task G. Redesign the GSF Calculator

The Consultant shall redesign the Maximum Allowable Gross Square Foot (GSF) Calculator to improve its accuracy, transparency, flexibility, and alignment with the updated APG and Statewide Adequacy Standards. The redesigned calculator shall transition from a primarily enrollment-driven framework to a program-driven methodology that reflects actual educational space needs. Enrollment shall remain a key input in determining the size and scale of programmatic components. The calculator shall also continue to support PSFA's role in establishing equitable and defensible limits for state funding participation.

The redesigned GSF Calculator shall function as a clear, consistent, and adaptable tool that translates defined educational programs and associated space requirements into a maximum allowable GSF. The calculator must be usable, transparent, and replicable across districts, while accommodating the diversity of school configurations found in New Mexico, including small schools, combined grade models, constitutional schools, and nontraditional or hybrid program delivery models.

The work will involve:

- Developing a modular “kit of parts” framework that defines gross square footage through discrete, program-specific space components, including instructional spaces, support areas, and specialized program spaces, with enrollment levels serving as a key input for determining the quantity, scale, and configuration of these components.
- Ensuring alignment and consistency between the GSF Calculator, the redesigned APG, and the updated Adequacy Standards, including clear relationships between space allocations, program requirements, and calculated GSF.
- Designing the calculator to accumulate Net Square Footage (NSF) based on programmatic inputs, such that total allowable GSF is derived from the sum of programmatic space components informed by grade level and enrollment rather than solely from enrollment-based assumptions.
- Establishing a flexible methodology for determining maximum allowable GSF, ensuring that the calculator can scale appropriately based on school size, grade configuration, program offerings, and instructional models, while maintaining consistency and equity across districts as well as adherence to Adequacy Standards.
- Retaining or redefining the role of enrollment-based metrics, as appropriate, to ensure compatibility with funding policies and to provide reasonable bounds or validation checks on calculated GSF.

- Evaluating and refining the treatment of non-assignable (TARE) space, including whether such space is represented as a percentage or otherwise structured to improve clarity and accuracy.
- Developing and integrating a companion module within the calculator that automatically generates maintenance cost and staffing estimates based on calculated GSF and programmatic complexity. This module shall operate as a downstream function that is triggered upon execution of the calculator, with outputs that are clearly separated from, and do not influence, the calculation of maximum allowable GSF.
- Ensuring the calculator can accurately accommodate nonstandard, very small, and very large school configurations—conditions under which the current calculator performs inadequately—by allowing space sizes and allocations to scale appropriately for low- and high-enrollment scenarios without compromising educational adequacy.
- Designing the calculator for transparency and auditability, such that all assumptions, formulas, and inputs are clearly documented, traceable, and understandable to users and reviewers.
- Explicitly identifying and resolving, or clearly documenting and explaining, any inconsistencies between APG narrative guidance and GSF Calculator logic, including how such conditions should be interpreted and applied by users.
- Developing the calculator in a user-friendly format, which may include spreadsheet-based tools, digital interfaces, or other formats, with clear instructions and intuitive inputs.
- Incorporating energy efficiency, HVAC performance, passive environmental strategies, renewable energy generation, and EV/bus infrastructure considerations, allowing stakeholders to model cost, energy, and GSF impacts from climate adaptation and mitigation measures.
- Allowing scenario testing to evaluate trade-offs and potential benefits of climate-responsive strategies, including energy savings, reduced maintenance, and operational resilience.
- Testing and validating the calculator through iterative stakeholder engagement, including scenario testing across a representative range of school types, enrollment scales, grade configurations, and program intensities (including very small and very large schools, combined schools, and program-intensive models) to confirm usability, reasonableness, and alignment with stakeholder expectations.
- Documenting the methodology, assumptions, and calculation logic in a clear and comprehensive manner to support implementation, training, and future updates.

Task G Deliverables:

- Draft GSF Calculator (Round 3): Initial version of the redesigned calculator, including structure, inputs, formulas, and preliminary assumptions.

- Refined GSF Calculator (Round 4): Updated version incorporating stakeholder feedback and improved alignment with the APG and Adequacy Standards.
- Final GSF Calculator: A fully functional, validated, non-proprietary tool delivered in editable formats, with full ownership and perpetual rights assigned to PSFA, suitable for use by PSFA and school districts for facility planning, programming, and funding-related calculations, and for ongoing modification and maintenance by PSFA or its designee.
- GSF Calculator Methodology Report: Comprehensive documentation of the calculator’s framework, assumptions, formulas, cost inputs, intended use, and file structure, with all calculator files, formulas, assumptions, datasets, and documentation delivered to PSFA in fully editable formats suitable for future modification and maintenance.
- User Guide and Instructions: Clear guidance for districts, designers, and PSFA staff on how to use the calculator, including example scenarios.
- Scenario Testing Summary: Documentation of test cases across different school configurations, including small schools, combined schools, and program-intensive models.
- Climate and Energy Scenario Analysis: Documentation of modeled impacts of adaptation and mitigation strategies on energy use, operational costs, and GSF requirements.

Task G Stakeholder Engagement:

- Round 3: Present the draft GSF Calculator framework, including the proposed kit-of-parts structure, calculation methodology, and sample outputs. Stakeholders will provide feedback on clarity, usability, and alignment with program needs.
- Round 4: Present the refined GSF Calculator, including scenario testing results and integration with the redesigned APG. Stakeholders will provide final input to confirm that the calculator is practical, transparent, and aligned with expectations.
- Feedback Integration: All stakeholder input from Rounds 3 and 4 will be documented and incorporated into the final calculator, ensuring that it reflects both technical rigor and practical usability.

Task H. Develop Guidance on Policies, Procedures and Update Cycles

The Consultant shall develop comprehensive guidance on the policies, procedures, and update cycles for implementing the updated APG. This task will ensure that the APG is practical for immediate use and provides a framework for ongoing revisions, aligned with other PSFA tools such as the GSF Calculator and Adequacy Standards. The Consultant shall provide recommendations for practical, sustainable update cycles for the APG, Adequacy Standards, and GSF Calculator, including suggested triggers for future review and revision, to support ongoing alignment with educational practice, statutory requirements, and statewide conditions.

The work will involve:

- Clarifying the roles and responsibilities for implementing the updated APG, including defining who is responsible for applying, interpreting, and maintaining the APG across various stakeholders (e.g., PSFA, school districts, design professionals).
- Developing clear procedures for how the APG should be used in real-world scenarios, such as project planning, school facility design, and funding applications, ensuring consistency with the revised Adequacy Standards.
- Establishing a clear process for future APG updates, including recommended update cycles, triggers for revisions, and processes for stakeholder involvement in future revisions.
- Creating a framework for integration between the APG, the GSF Calculator, and other relevant PSFA tools, ensuring that users understand how these elements interact and complement each other in the design and funding process.
- Documenting a strategy for ongoing stakeholder engagement during future updates to ensure that the APG continues to reflect the evolving needs of schools and communities across New Mexico.
- Providing recommendations for training and communication to ensure that all relevant stakeholders (PSFA staff, districts, design professionals, contractors) are informed about the updated APG and understand how to apply it in practice.
- Providing guidance on integrating climate adaptation and mitigation considerations into future APG updates, including monitoring energy performance, renewable energy adoption, and resilience measures.
- Documenting procedures for considering EV infrastructure, bus electrification, and sustainable design strategies in project planning and funding requests.

Task H Deliverables:

- Draft Guidance Document: A clear, actionable document outlining policies, procedures, and the framework for future updates to the APG.
- Stakeholder Feedback Summaries: Summaries of input from stakeholders on the draft guidance, with recommendations for adjustments.
- Final Guidance Document: A finalized version of the guidance document, incorporating stakeholder feedback and ensuring alignment with PSFA's goals and priorities.

Task H Stakeholder Engagement:

- Round 4: Present the draft guidance document to stakeholders for review and feedback. Focus on clarity, feasibility, and how well the guidance aligns with the revised APG. Gather input on the roles, responsibilities, and processes outlined in the draft.

- Round 5: Present the near-final guidance to stakeholders for confirmation that the policies and procedures are practical, clear, and meet the needs of all stakeholders. Collect final input to ensure that the guidance is fully aligned with the APG and the needs of New Mexico's schools.
- Feedback Integration: All stakeholder input from Rounds 4 and 5 will be documented and used to finalize the guidance, ensuring that it is practical, user-friendly, and applicable for the long-term implementation of the APG.

Task I. Develop Training Materials and Provide Implementation Support (Optional)

The Consultant shall develop and deliver training materials and implementation support to enable PSFA, PSCOC members, school districts, and design professionals to effectively understand and apply the updated Adequacy Planning Guide (APG), Adequacy Standards, and GSF Calculator. Training materials and approaches shall be designed to support both the initial statewide rollout of the updated APG and ongoing onboarding of new PSFA staff, district leadership, school facilities personnel, and other stakeholders over time.

The work shall include, at a minimum:

1. Creating comprehensive training materials tailored to different stakeholder groups, including PSFA staff, PSCOC members, school district representatives, design professionals, planners, and contractors.
2. Developing a training curriculum that addresses both the conceptual foundations of the APG updates (emerging program needs, statutory context, space allocation logic) and the practical application of the revised APG and GSF Calculator.
3. Conducting pilot training sessions with key stakeholders to test training materials, delivery formats, and clarity, and using feedback to refine the training approach prior to broader rollout.
4. Delivering statewide training sessions, virtually and/or in person, as directed by PSFA.
5. Providing post-training implementation support to assist stakeholders during early use of the updated APG and GSF Calculator, including responding to questions and documenting recurring areas of confusion or misapplication.
6. Including dedicated training modules addressing climate-responsive design, energy efficiency, renewable energy integration, EV and school bus electrification, resilience strategies, and use of the GSF Calculator to model energy, cost, and climate impacts.

Task I Deliverables:

- Training Materials: A comprehensive set of presentations, user guides, FAQs, and reference documents tailored for reuse in both initial rollout and future onboarding.

- Pilot Training Report: Documentation of pilot training sessions, participant feedback, and refinements made to training materials and delivery approach.
- Final Training Plan: A finalized plan describing training objectives, target audiences, delivery formats, timing, and logistics for statewide implementation and future onboarding use.
- Training Delivery Record: A record of all training sessions conducted, including attendance, stakeholder representation, and key topics covered.
- Training Feedback Summary: A synthesis of participant feedback regarding clarity and usability of the updated APG and GSF Calculator, identifying recurring questions or areas of confusion and informing refinement of training materials intended for ongoing PSFA use.

Task I Stakeholder Engagement:

- Round 4: Present the draft training materials to stakeholders for feedback, focusing on the clarity and relevance of the materials and the training curriculum. Use this feedback to refine the training approach before pilot sessions.
- Round 5: After the pilot training, present the final training plan and materials to stakeholders for approval. Address any remaining issues or questions, ensuring that the training sessions are fully prepared to be delivered statewide.
- Feedback Integration: All feedback from Rounds 4 and 5 will be documented and incorporated into the training materials and guidance, ensuring that the content is relevant, clear, and actionable for statewide rollout and ongoing onboarding use by PSFA and future stakeholders.

Appendix A: Definitions

For purposes of this Scope of Work, the following terms shall have the meanings described below. These definitions are intended to promote consistent interpretation and application of the Adequacy Planning Guide update, associated standards, and supporting tools across all tasks and deliverables.

- **Adequacy Planning Guide (APG):** The PSFA guidance document that translates statutory school facility adequacy requirements and planning best practices into practical facility planning and design guidance for New Mexico public schools.
- **Statewide Adequacy Standards:** Statutorily established minimum requirements for public school facilities in New Mexico, as defined in state law and applicable regulations.
- **GSF Calculator:** The Maximum Allowable Gross Square Foot Calculator used by PSFA and school districts to determine the maximum eligible gross square footage of a school facility based on enrollment, defined educational programs, and application of the Statewide Adequacy Standards.
- **Statutory Adequacy Requirements:** Facility requirements mandated by New Mexico statute or regulation that establish minimum adequacy thresholds for public school facilities.
- **Planning Guidance / Best-Practice Guidance:** Non-statutory recommendations, standards, and explanatory guidance provided by PSFA to support sound, defensible, and equitable school facility planning beyond minimum statutory compliance.
- **District Contexts:** The differing conditions under which New Mexico school districts operate, including variations in enrollment size, grade configuration, geography, remoteness, staffing capacity, operational resources, and community context.

Appendix B: Required Qualifications and Experience

1. Stakeholder Engagement

1.1 Stakeholder Engagement Specialist / Facilitator

- Highly organized, with the ability to develop a single, structured yet flexible stakeholder engagement plan that sets clear expectations, builds trust, and provides predictability for participants.
- Skilled in designing and facilitating robust, creative public engagement processes that bring together diverse and often opposing viewpoints, fostering constructive dialogue while maintaining strict neutrality.
- Capable of designing engagement strategies that go well beyond minimum statutory notice requirements.
- Able to engage specialized school communities, including charter, residential, military, and accessibility-focused schools.
- Attuned to the rich diversity of local cultures and traditions across New Mexico.

2. Educational Facilities Planning

2.1 Educational Facilities Planning

- Can translate educational programs into clear space requirements, including tare. Educational spaces include areas for general teaching, science, career and technical education (CTE), pre-Kindergarten (pre-K), special education, fine arts, physical education (PE), wellness, school administration, food preparation and service, and other activities.
- Able to think creatively about making spaces more flexible in response to changes in cohort sizes, technology, curricular needs, and other circumstances.
- Experienced in planning for residential, military, and specialized schools, including accessibility for students with visual or hearing impairments.

2.2 Understanding of School Facility Policy and Standards

- Familiar with policies and standards for educational facilities in New Mexico and elsewhere, including requirements related to space adequacy, space eligibility, funding, etc.

2.3 School Enrollment and Demographic Analysis

- Capable of analyzing historical school enrollment records and projecting future enrollment.
- Capable of identifying and understanding factors that influence student population changes, including:

- Birth rates, migration patterns, and population shifts.
- Public school alternatives such as charter schools, home schooling, and private schools, and how they affect enrollment.
- Capable of supporting updates to the GSF calculator and APG to ensure that space allocations remain accurate, scalable, and responsive to changing enrollment patterns and educational priorities over time.

2.4 Data Analysis

- Able to update PSFA's Gross Square Footage (GSF) Calculator to ensure:
 - Consistency with the Adequacy Planning Guide (APG) and New Mexico's Adequacy Standards for School Facilities.
 - Ease of use.
 - Transparency of methods and assumptions.
 - Usability across varying district contexts, school grade combinations, and specialized school types.
- Able to design and run scenarios to test the outputs of the GSF Calculator to ensure accuracy, alignment with Adequacy Standards, scalability, etc.
- Able to collaborate effectively with other team members to ensure GSF Calculator outputs are reasonable given varying student populations, evolving program needs, budgetary constraints, and other factors.

3. Architectural Design

3.1 Facility Design for Pre-K to 12 Schools

- Experienced in designing schools consistent with current educational practices, universal design, and flexible learning environments.
- Understands how changing environmental conditions driven by climate change—such as longer summers, abrupt seasonal transitions, increased wildfire risk, and heightened flood exposure—affect building performance, design, and future space planning.
- Skilled in developing visual guidance materials (conceptual layouts, scaled diagrams, axonometric views, illustrative floor plans, and other representations) suitable for inclusion in the APG.
- Knowledgeable about space standards for classrooms, labs, gyms, performance spaces, and specialized areas (science, CTE, fine arts, pre-K, special education, wellness centers, etc.), and residential or specialized programs.
- Understands urban, suburban, rural, and tribal contexts, including remote districts, and can factor construction and maintenance cost variations into school design guidance.

- Understands the specialized needs and concerns of publicly funded charter schools and how they differ from schools managed traditionally by School Districts.
- Sensitive to the wide variety of local cultures and traditions in New Mexico.

3.2 Landscape Design (School Contexts)

- Experienced in designing outdoor learning spaces, playgrounds, recreation areas, and site landscaping specifically for pre-K and K-12 schools.
- Knowledgeable about practical requirements, safety standards, and the educational potential of outdoor spaces and other school site features.
- Skilled in creating solutions that support student wellness, physical activity, and flexible use of outdoor spaces.
- Understands urban, suburban, rural, and tribal contexts, including remote districts, and factors construction and maintenance cost variations into design guidance.
- Skilled in synergistic, multi-functional design (e.g., shade structures that also serve as solar arrays or growing platforms for teaching gardens).
- Sensitive to the wide variety of local cultures and traditions in New Mexico.

3.3 Access, Circulation and Site Planning

- Skilled in school site evaluation and selection, as well as planning functional, high-performing campuses.
- Experienced in planning and designing pedestrian access and circulation; bicycle access and parking; bus staging and parking; automobile access, pick-up/drop-off, and parking; and EV charging (for both cars and buses).
- Understands urban, suburban, rural, and tribal contexts and how site conditions and design decisions affect construction, maintenance, and operational costs.
- Sensitive to the wide variety of local cultures and traditions in New Mexico.

3.4 Interior Design / Space Planning

- Skilled in planning furniture, storage, and space layouts that support flexibility and multi-use rooms.
- Expertise in circulation, adjacency relationships, and operational support spaces.
- Understands urban, suburban, rural, and tribal contexts, including remote districts, and can factor cost implications into interior design guidance.

- Sensitive to the wide variety of local cultures and traditions in New Mexico.

3.5 School Security

- Expertise in CPTED principles and layered security strategies appropriate for pre-K–12 environments.
- Skilled in secure site and building planning, including controlled access, visitor management, traffic separation, and clear sightlines for supervision.
- Experienced in integrating security considerations into circulation, adjacencies, and shared spaces without compromising a welcoming school climate.
- Knowledgeable in emergency preparedness planning, including lockdown-capable spaces and coordination with first responders.
- Familiar with applicable life safety codes, state and federal school security guidelines, and security technology infrastructure planning.
- Experienced in conducting security assessments to inform new construction and renovation planning.

4. Visualization / Graphic Design

- Skilled in creating user-friendly visual materials (illustrations, diagrams, axonometric views, charts, tables, etc.) for the APG.
- Knowledgeable about translating space standards and educational guidance into clear visuals for administrators, designers, PSCOC members, and other stakeholders.
- Understands urban, suburban, rural, and tribal contexts, including remote districts, and can reflect cost and site considerations in visual materials.
- Sensitive to the wide variety of local cultures and traditions in New Mexico.

5. Construction Cost Estimating, Building Systems & Building Operations

5.1 Construction Cost Estimators

- Experienced in preparing both conceptual-level and detailed cost estimates for school facilities.
- Understands how cost patterns vary by geographic context (e.g., highly accessible versus rural remote) and can advise on how to account for those differences in the APG and GSF Calculator.

- Able to analyze the implications of design guidance on construction and long-term maintenance costs.

5.2 Building Systems & Operations Specialists

- Knowledgeable about mechanical, electrical, plumbing, technology systems, and other building systems relevant to K-12 schools.
- Knowledgeable about specialized systems for residential, accessibility, and security requirements in Constitutional Schools and other specialized facilities such as charter schools.
- Understands how lifecycle costs, staffing capacity (e.g., for maintenance), and other factors can differ across districts and impact building longevity and operational sustainability.

6. Implementation and Training

- Experienced in developing implementation plans for new policies, procedures, guidance, and standards that include beta tests, phased rollouts, transitions, update cycles, revision triggers, etc.
- Skilled in developing and delivering effective training materials and presentations to engage stakeholders and help build capacity for successful implementation of new policies, procedures, guidance, and standards.

7. Consulting Team Leadership

- Able to manage multi-disciplinary consulting teams, including planners, designers, data specialists, cost estimators, and engagement professionals.
- Familiar with all five project management process groups and able to apply them to coordinating APG updates, stakeholder engagement, and deliverable production.
- Able to engage communities with diverse populations and interests.
- Able to work collaboratively with the PSFA Project Manager and APG Working Group to ensure the team remains aligned with client needs throughout the project.
- Able to structure deliverables, timelines, and decision points clearly and transparently.

Appendix C: General Deliverable Requirements

B.1 Purpose

This appendix establishes general requirements and qualitative criteria that apply to all deliverables produced under this Scope of Work. These requirements are intended to ensure that all work products are clear, consistent, defensible, and usable by PSFA, school districts, and other intended users.

B.2 General Standards for All Deliverables

All deliverables developed under this Scope of Work shall:

- Be consistent with the approved Refined Scope of Work (RSOW) and applicable statutory requirements.
 - Demonstrate internal consistency and clear alignment among the Adequacy Planning Guide (APG), Statewide Adequacy Standards, and the Maximum Allowable GSF Calculator.
 - Clearly distinguish between statutory adequacy requirements and recommended or best-practice guidance.
 - Be prepared in a manner that is technically sound, transparent, and methodologically defensible.
 - Be written and organized for the intended audience, including PSFA staff, school districts, design professionals, and decision-makers.
 - Incorporate and respond to documented stakeholder input, with clear explanation where input was not incorporated.
 - Be provided in editable and usable formats, consistent with the requirements of this Scope of Work.
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B.3 Clarity, Usability, and Transparency

Deliverables shall:

- Use clear language, visuals, and organization appropriate to a statewide planning and guidance document.
 - Clearly document underlying assumptions, methodologies, inputs, and limitations, as applicable.
 - Avoid unnecessary duplication while providing sufficient explanation to allow users to understand and apply the guidance or tools without reliance on the Consultant.
-

B.4 Review, Revision, and Acceptance

Deliverables shall be submitted for PSFA review in accordance with the approved project schedule. PSFA may request reasonable revisions to address issues of clarity, consistency, completeness, or alignment with the Scope of Work and RSOW.

A deliverable shall be considered acceptable when the PSFA Project Manager determines that it substantially complies with this Scope of Work and the RSOW, meets the general standards set forth in this Appendix, and is suitable for its intended purpose and audience.

All deliverables shall be subject to the Quality Control and Assurance procedures established under Task A.4, and acceptance determinations shall consider documented compliance with those procedures in addition to the requirements of this Appendix.

B.5 Consistency Across Deliverables

Where multiple deliverables address related subjects (including the APG, Adequacy Standards, and GSF Calculator), the Consultant shall ensure that terminology, assumptions, and logic are consistent and mutually reinforcing, and that any differences, exceptions, or deviations are clearly identified and explained.

B.6 Ownership and Future Use

All deliverables shall be prepared in a manner that supports future PSFA use, modification, and updates, consistent with the ownership and editability requirements established in this Scope of Work.

Appendix D: Stakeholder Engagement Structure

PSFA recommends the engagement structure in this appendix as a baseline to ensure statewide representation, iterative feedback, and robust stakeholder participation. Respondents may follow this approach or propose an alternative that achieves the same objectives, including statewide reach, in-person participation, iterative engagement, and a final Plenary Round.

Engagement meetings will ideally be held in person. All stakeholders are expected to attend on-site; remote participation will not be available except where necessary to provide reasonable accommodation as required by applicable ADA requirements.

Stakeholder engagement must include a review of statutory requirements, clearly distinguishing mandatory standards from advisory guidance.

In-Person Participants at All Meetings

- PSFA Project Manager
- At least one additional PSFA manager
- A non-manager from PSFA to serve as on-site support staff
- Stakeholder Engagement Specialist

Consultant Participation

The Consultant must ensure that at least one key team member participates meaningfully in every meeting, typically joining remotely. Exceptions are the first round of meetings, where the Consultant team will be introduced, and the Round 5 plenary meeting. In these cases, the Consultant team should participate in person. For any remote participation, the Consultant must confirm that the internet connection at each venue is reliable and that the room’s sound system allows remote participants to hear all in-person discussions clearly.

Venue Selection and Preparation

Before Round 1, the Consultant will develop venue suitability criteria and use them to select locations. Criteria include:

- Minimizing travel distances for participants
- Venue quality (lighting, acoustics, internet reliability)
- Availability and quality of nearby lodging and services

All venues will be visited and tested with both in-person and remote presentation materials in a “dry run” of the meeting agenda.

Engagement Rounds

Each Engagement Round is anticipated to include multiple in-person meetings held at locations across the state, with six (6) meetings per round (except for Round 5), subject to refinement and approval in the Stakeholder Engagement Plan.

- Round 1 – Project Introduction and Listening Session: Introduce the project purpose, scope, and objectives. Introduce the Consultant team and roles. Present the ethical framework and conflict-of-interest safeguards described in Task A.3. Solicit open-ended input from stakeholders regarding school facility needs, programmatic challenges, community considerations, PSFA processes, the existing APG, the Adequacy Standards, and the GSF Calculator. Document all input for synthesis and reference in later tasks.
- Round 2 – Existing Conditions and National Context: Present findings from Task B (Existing APG, Standards, and GSF Calculator baseline review). Present findings from Task C (National Best Practices and Emerging Programs). Facilitate structured discussion to obtain stakeholder feedback, particularly regarding the applicability of national practices within New Mexico contexts. Document all feedback for use in Task D evaluations and subsequent work.
- Round 3 – Space Evaluation and Initial Draft Concepts: Present findings from Task D (Existing and New Space Evaluation). Present draft concepts from Tasks E and F, including early redesign direction for the APG and GSF Calculator. Conduct workshop-format sessions to obtain detailed input on space priorities, allocation logic, usability considerations, and alignment with educational programs. Document feedback to inform revisions.
- Round 4 – Near-Final Draft Review and Implementation Framework Present updated and near-final drafts of the APG and GSF Calculator (Tasks D through F). If the Consultant has draft materials from optional Task I, present them as well. Confirm stakeholder priorities and assess whether the revised materials are clear, feasible, and usable. Document all feedback for final refinement.
- Round 5 – Transparency and Final Input: Present consolidated, near-final materials for the APG, GSF Calculator, Guidance Document, and Training Plan. Conduct a final workshop to confirm alignment, transparency, and stakeholder understanding. Collect final input prior to project closeout. This Plenary Round will be held in a central location, likely Santa Fe.

Presentation and Affirmation of Consultant’s Commitment to Ethics

- Round 1: Present the ethical framework to stakeholders to ensure transparency and establish trust. This will include an overview of the steps taken to avoid conflicts of interest and how the Consultant team ensures impartiality throughout the project.
- Rounds 2 through 5: Reaffirm the Consultant’s commitment to maintaining ethical standards and address any questions or concerns that arise regarding potential conflicts of interest or ethical issues.
- Feedback Integration: Any ethics-related feedback or concerns raised by stakeholders will be documented, reviewed, and addressed to ensure the Consultant maintains impartiality throughout the project.

Continuous Documentation and Integration

The Consultant shall document and synthesize all stakeholder input across each round. Input shall be tracked, categorized by topic and task, and incorporated iteratively into project work products. Deliverables for documentation include meeting agendas, sign-in sheets, stakeholder input logs, synthesized feedback summaries, and the Engagement Tracking Framework itself, which together form the official Stakeholder Engagement Plan (SEP) record. Ethics reminders consistent with Task A.3 shall be provided at each Engagement Round.

The SEP shall include an Engagement Tracking Framework that:

- Documents participation by stakeholder type and geography
- Tracks themes, recommendations and decisions by task to ensure transparent integration into project deliverables.
- Identifies how input is incorporated into revisions
- Maintains transparency regarding decision-making

The Consultant shall prepare meeting notes and feedback summaries linked to specific Engagement Rounds and associated project tasks.

Populations to Engage

- State-level policy stakeholders – PSCOC members, PSCOOTF, other legislators, legislative committee staff, etc.
- School Administrators – superintendents, principals, assistant principals, and district-level program directors
- School Board Members – elected or appointed members of local school boards
- Teachers – classroom and program-level educators across grade levels and subjects
- Non-teaching school staff – administrative, janitorial, maintenance, and other staff
- Parents and Guardians – representing families with children in K–12 schools
- Students – middle and high school students, and potentially elementary students using age-appropriate methods
- Planning Professionals – planners in the public or private sector who support school siting and facility decisions and address issues such as demographic analysis, land use and zoning coordination, community integration, neighborhood impacts, and other related matters
- Design Professionals – architects and engineers involved in school design
- Other Community Stakeholders – taxpayers, alumni, or others with an interest in public school facilities

Stakeholder Engagement Deliverables

The following deliverables will be produced as part of the SEP:

- Stakeholder Engagement Plan (SEP), including:
 - Engagement strategy and methods
 - Round-specific agendas and materials
 - Venue selection and preparation documentation
 - Sign-in sheets and participant records for each meeting
 - Meeting notes and feedback summaries for each Round
 - Synthesized stakeholder input linked to project tasks

- Engagement Tracking Framework documenting:
 - Participation by stakeholder type and geography
 - Themes and recommendations by task
 - Integration of input into project decisions
 - Transparency of decision-making processes
 - Ethics presentation and feedback documentation

- Final SEP Report consolidating all rounds and feedback