

EXHIBIT A
Scope of Work (SOW)
Adequacy Planning Guide UPDATE– Phase 1

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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 **Exhibit A 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. This creates a need for clearer guidance on how those spaces and related systems should be planned and designed so PSCOC participation remains limited to PreK–12 educational uses and other costs remain separable over time. As a result, the APG, Statewide Adequacy Standards, and GSF Calculator require periodic review to remain aligned with evolving educational practices, programmatic needs, and community expectations.

PSFA has elected to complete this update through a phased implementation strategy. This Scope of Work defines the first phase of that effort, which focuses on reviewing the existing APG, Statewide Adequacy Standards, and GSF Calculator; identifying national best practices and emerging educational programs; and evaluating existing and potential future APG facility and campus space types. The work performed under this phase will establish the technical foundation for subsequent phases of the project.

Future phases are expected to build upon the work completed under this Scope of Work by synthesizing the technical findings and stakeholder input gathered through the overall APG update process into recommended revisions to the APG and GSF Calculator, developing guidance on policies, procedures, and update cycles, and preparing training materials and implementation support.

This Scope of Work defines the services, tasks, deliverables, and engagement requirements for a qualified consulting team to perform the first phase of this effort on behalf of the New Mexico Public School Facilities Authority (PSFA). The selected Consultant will work closely with the PSFA Project Manager to develop a comprehensive technical foundation that will inform subsequent project phases and ultimately support updated planning guidance, standards, and implementation tools for public school facility planning throughout New Mexico.

2. Consultant Qualifications

The Consultant team must demonstrate national experience in school facility planning and design, including the ability to translate educational programs, enrollment needs, adequacy requirements, and facility planning best practices into clear guidance, standards, tools, and stakeholder materials. The team must also have experience evaluating school facility space types, planning standards, and related guidance documents; integrating emerging educational programs and relevant national best practices into school facility planning; and addressing specialized topics relevant to this Scope of Work. Specialized topics include cost control, prototype school planning, site selection, non-motorized access, school security, hazard resilience, renewable energy, outdoor lighting and night-sky protection, and electric vehicle and school bus charging infrastructure.

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 Tasks / Scope

Overview of Work

The Consultant shall perform Phase 1 of PSFA's phased APG update. Phase 1 encompasses the following tasks:

- Task A: Phase 1 Project Management
- Task B: Review Existing APG, Statewide Adequacy Standards, and GSF Calculator
- Task C: Synthesize Best Practices and Emerging Educational Programs
- Task D: Evaluate APG Facility and Campus Space Types

Tasks B, C, and D are designed to build on one another without duplicating effort. Task B establishes what the current APG, Statewide Adequacy Standards, and GSF Calculator say or fail to address. Task C identifies relevant national best practices, emerging educational programs, and comparable planning models. Task D applies the findings from Tasks B and C to evaluate APG facility and campus space types and identify potential revisions or new categories for later consideration.

The purpose of this phase is to establish a clear and well-documented technical foundation for later phases of the APG update. Those later phases are expected to address synthesis of findings and stakeholder input; revisions to the APG and GSF Calculator; policies, procedures, and update cycles; and training and implementation support.

PSFA will manage the overall APG update and retain responsibility for all project decisions, including acceptance of deliverables and direction regarding future project phases. The Consultant shall coordinate with the PSFA Project Manager and support stakeholder engagement activities by preparing technical materials, presentations, visual aids, and other information requested by PSFA. The Consultant shall participate in stakeholder engagement activities when requested by the PSFA Project Manager but shall not design, manage, or facilitate the stakeholder engagement process.

All work products developed under this Scope of Work, including narratives, analyses, methodologies, data compilations, presentations, visual materials, and related files, shall be the property of PSFA. Work products shall be delivered in easily editable formats suitable for PSFA's future use, revision, and integration into later phases of the APG update.

Task A. Manage Phase 1 Work

The Consultant shall provide project management for the work performed under this Scope of Work from Notice to Proceed through project closeout. The Consultant shall designate a Consultant Project Manager who will serve as the primary point of contact for day-to-day coordination with the PSFA Project Manager.

Within twenty business days of Notice to Proceed, the Consultant shall submit a Project Work Plan identifying its proposed schedule, key milestones, staffing assignments, and anticipated deliverable dates. PSFA may work with the Consultant to make reasonable adjustments to the Work Plan during project startup.

The Consultant shall maintain continuity of key personnel identified in its proposal. The Consultant shall obtain PSFA approval before replacing the Consultant Project Manager or another key member of the Consultant team.

The Consultant shall conduct regular project-management meetings with the PSFA Project Manager,

prepare meeting records, maintain a detailed project schedule, identify issues requiring PSFA direction, and provide monthly progress reports addressing completed work, upcoming work, schedule status, risks, quality-control activities, and decisions needed from PSFA.

The Consultant shall prepare and implement a project-specific Quality Control Plan to ensure technical accuracy, internal consistency, clear documentation of assumptions and methodologies, and completeness of all deliverables. The Consultant shall revise deliverables as reasonably necessary to address PSFA comments and achieve acceptance.

Task A deliverables:

- ☐ Project Work Plan with Schedule and Milestones
- ☐ Quality Control Plan
- ☐ Meeting documentation
- ☐ Monthly progress reports
- ☐ Consolidated project record
- ☐ Closeout documentation

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.
- Summarizing statutory adequacy requirements, including how they inform space requirements and design considerations and how they are incorporated into the APG.
- Documenting the structure and methodology of the GSF Calculator.
- Reviewing the existing APG, Standards, and relevant state statutes to identify and analyze gaps related to school security, school bus and personal vehicle electrification, renewable energy generation on school campuses, site selection best practices, best practices for enabling and encouraging non-motorized school access, strategies for addressing wildfire and flood risks to school campuses.
- Compiling materials from workshops and engagement activities conducted before project initiation (including notes, surveys, presentations, etc.) to document past stakeholder input.

Task B deliverable:

- ☐ Existing Conditions Summary Report, to include:
 1. A summary of the existing Adequacy Planning Guide (APG), including space allocations, eligibility criteria, and guidance language.
 2. A summary of the Statewide Adequacy Standards and how they are reflected in the APG.
 3. A description of the Maximum Allowable GSF Calculator and analysis of current known issues related to it.

4. A gap analysis identifying opportunities to address school security, school bus and personal vehicle electrification, renewable energy generation on school campuses, site selection best practices, best practices for enabling and encouraging non-motorized school access, and strategies for addressing wildfire and flood risks to school campuses.
5. A summary of stakeholder input from workshops and engagement activities conducted prior to project initiation.
6. Identification of key findings, issues, and areas for further evaluation in subsequent project tasks.

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), ancillary services (e.g., support spaces for special education), and others.
- Identifying innovative or evolving approaches to space allocation, program integration, and design flexibility that align with emerging educational practices.
- Reviewing national and state-level approaches to prototype school planning and design approaches, including common-core, kit-of-parts, and 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 high-performance and resilient school design, including HVAC, passive environmental strategies, renewable energy integration, and hazard resilience – particularly in regions experiencing increased temperatures, changing seasonal conditions, extreme weather events (e.g., heavy rainfall and dust storms), and elevated wildfire and flood risks.
- Identifying best practices to minimize school facility planning, construction, maintenance, and operations (M&O) costs.
- Identifying best practices for site selection and campus layout to: (1) reduce facility M&O costs; (2) reduce exposure to hazards such as wildfire, flooding, and extreme heat; and (3) address security concerns without compromising safe and convenient non-motorized access to school campuses.
- Identifying best practices to support safe walking and bicycling to school, including site design, circulation, and connections to surrounding neighborhoods.
- Identifying best practices for outdoor lighting and site illumination that support safety while minimizing light pollution and protecting dark skies, consistent with the New Mexico Night Sky Protection Act (Sections 74-12-1 through 74-12-11 NMSA 1978).

- Addressing facility planning and site integration considerations for electric vehicle and school bus charging infrastructure.
- 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.

Task C Deliverables:

- ☐ National Best Practices White Paper: Summarizing research on relevant school facility planning trends; educational programs and facility needs, including academic spaces, Career Technical Education (CTE), Pre-K/early childhood, wellness, performing arts, special education, and residential uses where applicable; innovative approaches to space allocation, program integration, and design flexibility; prototype school planning and design approaches, including common-core, kit-of-parts, and repeatable planning models; strategies to improve cost control, schedule predictability, and operational efficiency while reducing facility construction and M&O costs; site selection and campus planning approaches; and facility design considerations, including energy efficiency, renewable energy integration, hazard resilience, active transportation, outdoor lighting and dark-sky considerations, and electric vehicle and school bus charging infrastructure. The white paper will also document relevant methodologies, assumptions, and performance metrics used for space planning, sizing, and cost estimation, and identify practices applicable to New Mexico schools.
- ☐ Best Practice Reference Materials for Stakeholders: Condensed examples, case studies, and visual aids to support engagement sessions and discussions.

Task D. Evaluate APG Facility and Campus Space Types

The Consultant shall use the baseline review completed under Task B and the best-practice research completed under Task C to evaluate existing APG facility and campus space types and identify potential new or revised space categories for consideration in later phases of the APG update. For purposes of this task, “space types” includes indoor facility spaces and campus-based outdoor areas or site-related program elements that may warrant APG guidance, eligibility criteria, or coordination with the GSF Calculator. This task shall focus on space-type analysis, program alignment, and documented gaps in the current APG framework. It shall not duplicate the broader existing-conditions review, best-practice research, or site and campus planning analysis addressed in Tasks B and C.

The work will involve:

- Evaluating current APG space types, space allocations, eligibility criteria, and guidance language to determine how well they support current educational programs, emerging programs, and varied district contexts.
- Identifying gaps, overlaps, outdated assumptions, unclear terminology, and inconsistencies in how the APG defines, organizes, and applies facility and campus space types.
- Assessing whether existing APG space types adequately address program areas such as general classrooms, cultural classrooms, other specialty classrooms, Career Technical Education (CTE), Pre-K/early childhood, special education, wellness, performing arts, physical education,

food service, administration, student support, building support, outdoor learning areas, play areas, shared-use outdoor spaces, and community-use spaces.

- Identifying candidate new or revised space categories that may warrant consideration in later phases, such as outdoor learning areas, mental health and wellness rooms, central kitchens, residential uses where applicable, EV and school bus charging areas, or other spaces supported by the findings from Tasks B and C.
- Evaluating how current and potential space types relate to enrollment size, grade configuration, school type, program delivery, utilization, flexibility, accessibility, operational implications, and alignment with the Statewide Adequacy Standards and GSF Calculator.
- Evaluating site and operational considerations associated with personal vehicle and electric school bus charging where relevant.
- Organizing findings in a structured format that clearly distinguishes between existing APG space types, potential revisions to existing space types, and candidate new space categories.
- Preparing concise technical materials, tables, and summaries that PSFA may use in later stakeholder engagement and subsequent phases of the APG update.

Task D Deliverables:

- ☐ APG Facility and Campus Space Type Evaluation Report: A structured evaluation of current APG facility and campus space types, including documented findings on alignment with educational programs, adequacy requirements, GSF Calculator methodology, utilization, flexibility, accessibility, operational implications, and identified gaps or inconsistencies.
- ☐ Candidate Space Categories Summary: A concise summary of potential new or revised space categories for consideration in later phases, including the basis for each candidate category and the related programmatic, operational, or adequacy issue it may address.
- ☐ Technical Materials for Stakeholder Engagement: Editable tables, summaries, and visual materials that PSFA may use to support stakeholder review, future synthesis, and later APG and GSF Calculator revisions.

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.