

Request for Proposal (RFP) for Long-Range Master Planning Services

Mequon-Thiensville School District

5000 W. Mequon Road
Mequon, WI 53092
(262) 238-8504

RFP Issued By: Mequon-Thiensville School District (MTSD)

Issue Date: July 23, 2026

Primary Contacts: Dr. Matthew Joynt (Superintendent) & Andrew Sarnow (Executive Director of Business Services)

Submission Deadline: August 24, 2026, by 12:00 p.m. CST

1.0 Executive Summary

The Mequon-Thiensville School District (MTSD) is soliciting competitive proposals from qualified educational facilities planning consultants, architects, and demographic analysts to develop an all-encompassing, 10-year Long-Range Facilities Master Plan (LRFMP) via a comprehensive planning process that evaluates facility, enrollment, instructional, operational, maintenance, and financial needs to ensure the District's long-term sustainability.

MTSD operates seven facilities serving approximately 3,500 students. While recent modernization efforts have successfully improved local learning environments, the District must proactively address several critical pressures over the next decade, including:

- Space-utilization imbalances driven by localized geographic growth in enrollment.
- Long-term funding optimization for aging building mechanical infrastructure and exterior building envelopes.
- Integration of specialized athletic facilities master planning on our high school campus.
- Rigorous contingency planning to guarantee fiscal stability in volatile structural funding environments.

The District seeks a forward-thinking planning partner or coordinated multi-disciplinary team who can translate high-quality instructional goals into physical space configurations, engage our

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tight-knit community transparently, and build a highly technical framework for capital asset preservation and fiscal resilience.

2.0 Introduction

MTSD is seeking a partner to develop a Long-Range Master Plan that provides the District with a 10-year roadmap that aligns our current physical realities, structural financial forecasts, pedagogical directions, and community expectations.

This RFP invites firms or multi-organizational teams to outline their core values, technical capabilities, stakeholder engagement methodologies, pricing structures, and outcomes from recent similar work. Submissions from multi-disciplinary partnerships (e.g., construction management firms, facility planning specialists, and architectural firms submitting jointly) must designate a single lead entity. The District intends to evaluate responses using a weighted, comparative selection matrix, conduct interviews with shortlisted finalists, and recommend a team to the Board of Education for contract award.

3.0 Background: District Overview & Profile

3.1 District Scale & Configuration

The MTSD covers a suburban geographic footprint in Ozaukee County, Wisconsin, serving the City of Mequon and the Village of Thiensville. The District currently educates approximately 3,500 students across 7 core facilities:

- Three Elementary Schools (Grades 4K–5): Donges Bay Elementary, Oriole Lane Elementary, and Wilson Elementary.
- Two Middle Schools (Grades 6–8): Lake Shore Middle School and Steffen Middle School.
- One High School (Grades 9–12): Homestead High School.
- One Community Center Building: The Range Line Community Center facility.

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3.2 Demographic Context & Structural Enrollment Realities

Following the [2022 Community Growth & Projections report](#) by MDROffers Consulting ([presentation video](#)), the District successfully implemented elementary attendance-area adjustments to balance enrollment across our facilities. Because these boundaries have already been optimized to align with recent residential development trends, further broad boundary re-alignments are not a primary focus of this master planning cycle. Instead, the elementary focus of this LRFMP will center on targeted spatial capacity and the potential building needs and opportunities:

- Through renovations funded by the 2019 facilities referendum, both Donges Bay Elementary and Wilson Elementary were structurally updated to comfortably operate as full four-section elementary schools (averaging four classrooms per grade level).
- Unlike the other two elementary structures, Oriole Lane Elementary currently has a smaller physical footprint. It has the capacity to sustain three sections (3+) per grade level but currently lacks the core infrastructure and classroom space to maintain an average of four sections per grade level.

While historical demography provides excellent context, the selected vendor will be required to integrate a new, updated Enrollment and Demographics Study slated to commence in September. The selected planning partner will be required to assess current enrollment projections and provide formal recommendations, including conceptual spatial layouts and cost indices, on whether structural additions to buildings are required or recommended.

4.0 Scope of Work

The selected partner will work closely with the District administration to complete a multi-disciplinary master planning project split across five functional domains:

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4.1 Educational Visioning & Spatial Alignment

- Conduct parallel visioning sessions with the Board and instructional staff to define the MTSD's high-quality academic programming objectives over the next decade. *Note: To comply with Section 8.0, these collaborative alignment sessions will be conducted strictly post-award during the project lifecycle.*
- Analyze existing physical learning environments to assess their educational adequacy, flexibility of use, and alignment with modern instructional standards.

4.2 Comprehensive Capital Asset Maintenance Analysis

- Conduct engineering-grade physical facility condition assessments across all seven District structures.
- Establish lifecycle deterioration curves and remaining useful lifespan matrices for all major building subsystems, including HVAC, electrical plants, structural envelopes, roofing, plumbing systems, civil site work, and energy conservation/utility efficiency opportunities.
- Evaluate physical facility safety and security infrastructure, including secure entry sequence design, access control hardware, site perimeter security, and visual sightlines.
- Assess physical technology backbone infrastructure, including MDF/IDF data closet climate controls, emergency power backup, low-voltage distribution, and wireless infrastructure capacity necessary to support modern learning environments.
- Formulate an itemized, preventative, and predictive 10-year capital maintenance plan with detailed cost indices to help the District prioritize capital funding.

4.3 Demographic Integration & Facility Capacity Analysis

- Review and embed the findings of the upcoming September 2026 Demographic and Enrollment Study.

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- Evaluate localized enrollment trends and housing additions to explicitly assess long-term capacity at both the elementary and middle school levels.
- Provide formal recommendations, structural options, and conceptual spatial layouts/cost estimates if physical additions or footprint expansions are recommended to maintain section equity.
- Analyze macro transportation impacts associated with any facility capacity or site footprint options, evaluating busing efficiency, ride-time trends, and contracted transportation cost considerations.

4.4 Comprehensive Capital Plan Financial Resilience Scenarios

The LRFMP must function securely across two divergent economic and structural funding baselines:

- Scenario A (Baseline): Capital maintenance schedules and educational space expansions assuming existing structural tax revenue allocations remain intact.
- Scenario B (Structural Retrenchment Scenario): A rigorous structural stress-test model showing how the District can eliminate its local operating referendum, detailing how to remove \$8 million from an operational budget of \$55 million to \$60 million. The plan must explicitly detail the facility-level implications of this retrenchment, identifying potential reductions in physical footprint, building closures, or program consolidations necessary to absorb the operational shortfall.

4.5 Outdoor Athletic Facility Integration

- Review and incorporate the draft Homestead High School Outdoor Athletic Facility Master Plan developed by Zimmerman and Harwood.
- Synthesize facility improvements (varsity synthetic-turf stadiums, bleacher and press box modernizations, site circulation improvements, and Phase 2 indoor multi-use builds) into the broader 10-year facilities timeline.

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- Provide spatial sequencing coordinates to ensure athletic improvements are properly aligned with site utilities, stormwater infrastructure, zoning rules, and adjacent neighborhood buffers.

4.6 Inclusive Stakeholder Facilitation

- Facilitate focus groups, public workshops, and collaborative listening sessions involving students, instructional staff, parents and guardians, community members, business partners, and municipal authorities.
- Design governance-level summaries, presentation materials, and public-facing evaluation dashboards to present scenario options for Board review and deliberation. All master planning deliverables shall be structured as advisory planning scenarios to support Board governance analysis.

5.0 Deliverables

Vendors must submit a comprehensive response package detailing:

1. *Educational Space Analysis Report*: Recommendations for educational adequacy modernizations.
2. *Technical Asset Maintenance Ledger*: A 10-year ledger of building subsystem assets with cost estimates and lifecycle projections.
3. *Enrollment Capacity & Addition Study*: Tailored spatial analysis for elementary and middle schools (including the Oriole Lane section evaluation) using the September 2026 baseline data.
4. *Dual-Scenario Financial Facility Roadmap*: Detailed capital and physical footprint paths for both the baseline operations budget and the \$8 million operational expenditure reduction framework.

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5. *Integrated Athletic Site Master Plan:* A unified timeline mapping high school campus field improvements alongside District infrastructure priorities.
6. *Public Presentation & Summaries:* Governance summaries, presentation materials, and a public-facing executive overview designed for Board review.

6.0 Submission Requirements

Proposals must remain concise and directly emphasize your firm's (or team's) relevant qualifications. Please organize submissions into the following distinct sections:

Section 1 - Corporate Profile & Qualifications: Overview of corporate history, financial solvency, and core competencies. If submitting as a multi-organizational team or joint venture, explicitly define the lead contracting entity, subconsultants, and team organizational chart.

Section 2 - Team Experience & Roster: Detailed biographies and professional resumes for the senior personnel explicitly assigned to run this project.

Section 3 - Technical Planning Methodology: Detailed technical narrative showing how your firm/team handles educational visioning, facility assessments, financial modeling, and boundary realignments.

Section 4 - Stakeholder Engagement Framework: Examples of your communication plans, community workshops, and facilitation methods used with public stakeholders.

Section 5 - References & Sample Work Products: To ensure a comprehensive evaluation of the firm's historical performance and capabilities, please provide the following:

- **Comprehensive Project List:** A complete list of all public school district long-range facility and/or master planning projects the firm has contracted within the last five (5) years.

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- **Contact Information:** For each project listed, provide the primary client contact name, title, school district, phone number, and email address. (*Note: The District reserves the right to contact any district on this list.*)
- **Sample Documents:** Digital links or PDF attachments for three (3) final, completed Long-Range Facility Master Plan documents produced for clients within the five-year window.

Section 6 - Clear Pricing & Cost Proposal: A comprehensive fixed-fee quote covering all primary project services, along with itemized menus for optional analytical add-ons.

7.0 RFP Lifecycle Timeline

The District will manage the procurement lifecycle according to the following strict timeline. Late submissions will not be considered under any circumstances.

- RFP Document Publication Date: July 23, 2026
- Deadline for Vendor Questions: August 14, 2026
- RFP Proposal Submission Deadline: August 24, 2026, @ 12:00 p.m. CST
- Evaluation & Shortlist Selection Notice: August 31, 2026
- Finalist Interview Sessions (If Needed): September 11, 2026
- Board of Education Consideration & Target Award: September 28, 2026
- Project Official Initiation Date: October 1, 2026
- Final Board Presentation of LRFMP Deliverable: March 15, 2027

7.1 Proposal Submission Instructions

- *Format:* Single, consolidated PDF document optimized for digital distribution and screen display.
- *Email Destinations:* Proposals must be emailed to both mjoynt@mtsd.k12.wi.us and asarnow@mtsd.k12.wi.us.
- *Email Subject Title:* MTSD Long-Range Master Plan Proposal - [Insert Firm Name]

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- *Proposal Transmission Rule:* Submission timestamps recorded by the District's primary incoming email server will establish the legal time of receipt.

7.2 References & Sample Work Products

To ensure a comprehensive evaluation of the firm's historical performance and technical capabilities in enrollment demography, structural facility assessments, capacity expansion modeling, and master plan formulation, proposers must provide the following:

- **Comprehensive Project List:** A complete list of all public school district long-range facility and/or enrollment master planning projects the firm has contracted within the last five (5) years.
- **Contact Information:** For each project listed, provide the primary client contact name, title, school district, phone number, and email address. (*Note: The District reserves the right to contact any district on this list.*)
- **Sample Documents:** Digital links or PDF attachments for three (3) final, completed Long-Range Facility Master Plan documents produced for clients within the five-year window. These samples will be evaluated for clarity, comprehensive data analysis, and overall presentation quality.

8.0 Contact Information

All communications, clarification requests, and structural questions must be sent via email directly to the following District administrators. No direct contact with members of the Board of Education or school staff is permitted during this active procurement process.

Dr. Matthew Joynt Superintendent of Schools Mequon-Thiensville School District mjoynt@mtsd.k12.wi.us 262-238-8504	Andrew Sarnow Executive Director of Business Services Mequon-Thiensville School District asarnow@mtsd.k12.wi.us 262-238-8509
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9.0 Evaluation Criteria

The District's evaluation panel will score all submitted proposals using a 100-point weighted evaluation matrix. The District reserves the right to accept or reject any or all proposals, or parts thereof, to waive informalities or technicalities, and to award contracts in the best interest of the District. The District will employ a structured, comparative assessment to determine which proposal offers the best overall combination of qualifications, methodology, and value, but shall not be bound to award solely based on the highest numeric evaluation score.

Points	Category	Objectives
30 Points	Relevant Corporate Qualifications & K-12 Planning Experience	• K-12 track record • Educational trend expertise • Team core values
30 Points	Technical Planning Methodology & Public Stakeholder Engagement	• Planning methodology • Group facilitation • Honoring strategic plan
25 Points	Pricing Structure, Itemized Value, and Financial Realism	• Cost-effective proposal • Fee transparency • Itemized value
15 Points	Key Staff Capacity, Roster Strength, and Timeline Milestones	• Direct access to project leads • Depth of firm • Time efficiency

9.1 Evaluative Rubric Breakdowns

The evaluation panel will score proposals across the four primary categories using the following detailed criteria:

- *Qualifications & K-12 Planning Experience (30 Points)*

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- Proven evidence-based track record of success leading complex K-12 long-range facility master planning projects of similar scale.
- Demonstrated capability in bringing effective innovations and forward-thinking educational spatial trends to K-12 districts.
- Clear organizational core values, vision, and professional ethics that directly support future student success and align with MTSD values.
- *Technical Methodology & Engagement Approach (30 Points)*
 - A well-defined, structured framework detailing "how it will work" across all planning phases, timelines, and Gantt charts.
 - Demonstrated expertise in group facilitation, utilizing diverse engagement strategies (e.g., focus groups, surveys, listening sessions) to assess community expectations.
 - Demonstrated approach to honoring and utilizing the District's existing Strategic Plan as a foundational resource to inform facility visioning.
- *Pricing Structure & Cost Value (25 Points)*
 - All-inclusive, competitive fixed fee that delivers high value without surpassing the allotted project budget.
 - Clear itemization of core services, reimbursable expenses, and optional analytical add-ons.
- *Staff Capacity & Timeline Realism (15 Points)*
 - Direct accessibility of senior project leads and depth of additional personnel to ensure the District can use its time efficiently.
 - A realistic, well-sequenced schedule capable of submitting the final master plan deliverable by March/April 2027.

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10.0 Contract and Payment Terms

- *Formal Engagement Standard:* The chosen partner must sign a standard professional services agreement drafted by district legal counsel before starting work.
- *Tax Status:* The MTSD is an officially recognized tax-exempt public entity under Wisconsin law. All cost quotes must be submitted clear of municipal tax indices.
- *Proposed Invoicing Schedule:*

Payment Phase	Percentage	Milestone / Conditions
Project Kickoff	20%	Disbursed upon execution of a signed agreement, district approval of the final master workplan, and formal project kickoff.
Progress Billing	Up to 60%	Invoiced monthly based on the documented work completed.
Final Completion	Remaining Balance	Disbursed upon successful presentation of the final master plan to the Board of Education and delivery of all completed files.

- *Public Records Law Compliance:* All documents submitted to or generated for the District throughout this project are subject to public inspection under Wisconsin's Open Records Law (Wis. Stat. §§ 19.31–19.39). To ensure proper governance review, all preliminary vendor work products, financial scenarios, and draft options shall be clearly designated as "Draft for Governance Study & Board Deliberation" until formally received by the Board of Education. Any proprietary commercial trade secrets submitted by the proposer must be clearly marked as confidential, accompanied by a redacted copy for public release.

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11.0 Exhibit A: Proposal Signature Page

Due Date: August 24, 2026, at 12:00 p.m. CST

By signing below, the undersigned certifies that:

1. The information contained in this proposal is true and correct to the best of their knowledge.
2. The firm agrees to abide by all requirements, terms, and conditions outlined in this RFP.
3. The individual signing this proposal is authorized to act on behalf of the firm in matters related to this proposal and any resulting contract.

Firm Information

- Legal Name of Firm: _____
- Address: _____
- City, State, Zip: _____
- Phone: _____ Website: _____

Authorized Representative

- Printed Name: _____
- Title: _____
- Email: _____ Phone: _____
- Signature: _____ Date: _____