REQUEST FOR QUALIFICATIONS
PROPOSITION A 2016 SCHOOL BOND PROGRAM

CONSTRUCTION MANAGEMENT SERVICES

DECEMBER 2016
ANNOUNCEMENT
REQUEST FOR QUALIFICATIONS NOTICE
SFUSD PROPOSITION A 2016 BOND PROGRAM
CONSTRUCTION MANAGEMENT SERVICES

The San Francisco Unified School District is accepting Statements of Qualifications (SOQs) for Construction Management Services (CM). Proposals must be submitted in Room 207 of 135 Van Ness Avenue, San Francisco:

NO LATER THAN 2:00 p.m. on January 27, 2017

This Request for Qualifications (RFQ) seeks Firms with the following types of experience:

- Demonstrable experience in successful completion of construction modernization projects for California T-K thru K-14 public schools
- Experience in both pre-construction and construction management services
- Experience modernizing historic and older (>50 year old) school facilities including access compliance, life safety, structural, information technology, food service upgrades
- Experience in other services which may include; phasing and project scheduling; constructability reviews, cost estimating, peer reviews of cost estimates, and project closeout

RFQ will be posted on the SFUSD website on December 12, 2016:


The RFQ provides a detailed description of the information required in the SOQ submission package. Any addenda issued to this RFQ will be posted on the website.

A pre-submittal meeting will be held on January 4, 2017 at 10:00 am at 135 Van Ness, 2nd floor conference room 210, San Francisco. All teams interested in submitting are strongly encouraged to attend.
A. INTRODUCTION TO RFQ SUBMITTAL PROCESS

1. Overview
The San Francisco Unified School District Bond Program is seeking Statements of Qualifications (SOQ) from qualified Construction Management Firms to provide construction management services for the SFUSD Proposition A 2016 Bond Program.

All participating firms must have an established office within a 30-mile radius of the city limits of San Francisco, under the name of the submitting firm for a minimum 2 years.

- Seven (7) bound copies in 8-1/2" x 11" format
- Max. length of SOQ - 28 pages (excluding resumes, references and billing schedules)
- 1- Digital file of proposal (thumb drive)
- Supporting materials in sealed envelope (financial statement and statement of claims)
- Hand delivered to:
  - Maureen Shelton
  - Director of Construction, Bond Program
  - San Francisco Unified School District
  - 135 Van Ness Avenue, Room 207
  - San Francisco, CA 94102-5207

All questions and comments regarding the RFQ directed to:
  - Fe Bongolan: email - BongolanF@sfusd.edu
  - Contracts Administrator
  - San Francisco Unified School District

All SOQs are due no later than 2:00 PM on January 27, 2017

Late submittals will not be considered.
Maximum points possible: 100

2. Description of Projects and Scope of Work
The Prop A 2016 Bond Program provides for school facilities improvements which may include modernization of existing facilities, additions and new schools, accessibility upgrades, health, life safety, seismic upgrades, food service upgrades, information technology upgrades, and infrastructure and maintenance improvements.

The District anticipates initial services to commence in March 2017.

3. Methodology of Contracting for Construction Management Services
The District will determine project assignments for the selected pool of Firms. Contracts will be awarded to the selected Firms based on accepted project assignments and agreed to cost proposals. Being selected to the pool does not commit the District to contracting with any given consultant or guarantee work will be assigned.

Fees shall be negotiated based on the Firm’s project assignments and current standard billing rate as submitted in the SOQ.
4. **Description of Construction Management Services**

The submitting team must demonstrate experience in services which include but not limited to the following:

**a) General items related to all phases**

1. Coordinate & Schedule meetings and send appropriate meeting appointments via email.
2. Prepare agendas for meetings and provide meeting notes within 3 days of the meeting date.
3. Meet bi-monthly with the District Director of Construction to present individual project reports and discuss overall status and issues on all projects under contract.

**b) Construction Document Phase through DSA Approval** includes but not limited to:

1. **Site Meetings**: Assist the Project Manager and Architect at site and community meetings.
2. **Estimating**: Provide a cost estimate at completion of one hundred percent construction documents design phase and review previous estimates provided by the Architect. Reconcile architects cost estimate with the CM’s independent cost estimate per SFUSD cost reconciliation procedures.
3. **Constructability Reviews**: Conduct a thorough review of the of one hundred percent construction documents (drawings and specifications). Review design documents for clarity, consistency, constructability and coordination. Review design documents on site for inclusion of existing conditions information and make recommendation with respect to constructability and site access. Review design documents for conformance with District Standards.
4. **Back check of Constructability Reviews**: Provide a written report of all findings and provide back-check of constructability review items after corrections have been incorporated into the design documents by the Architect.
5. **Coordination of Public Utilities**: Coordinate and manage all new utility service and applications with appropriate public utilities to meet project schedules.
6. **Scheduling Services**. Coordinate and develop project construction phasing schedules that meet deadlines required by the District. Update and track project status against project design schedule and provide the District a written report and recommendations on scheduling.
7. **Project Management Systems**: Work with the project reporting systems implemented by District staff.
8. **Construction Phasing/Logistics Plans**: Assist the Architect to develop construction phasing plans that accomplish construction in an occupied school. Include location of interim housing, construction trailer, material storage and lay down area, site access and safety routes. Consideration for retaining all school services during construction or temporary measures.
9. **HazMat Coordination**: Assist the District in the coordination of the Industrial Hygiene Consultants and the Architect.

c) **Bid Phase Services** includes but not limited to:

1. **Bid Strategy**: Consult with District staff in developing bidding strategies with an emphasis upon timing, development of alternates, and bid package scoping.
2. **Review of Div. 0 & Div. 1:** Review draft of Architect prepared specifications for each project in particular, Div. 0 and 01 specifications to confirm compatibility with the District's master specifications and that all project specific information has been properly incorporated.

3. **Addenda:** Assist the Architect in developing bid addendum items for District approval prior to A/E proceeding with addenda.

4. **Bid Documents:** Assist the Architect with any documents required for bid packages and addenda.

5. **Bid Marketing:** Provide services for bid marketing and bidder solicitation.

6. **Job-Walk:** Coordinate all job walks with the project site, acquire site keys, provide job walk agendas, sign in sheets and take the lead at the site walk.

7. **Bids:** Assist the District in reviewing bids for responsiveness, perform references checks, etc. Coordinate all pre-construction tasks, such as submission of all required DSA forms prior to start of construction.

8. **Preload Submittals:** Preload in District project management software all project submittals, shop drawings and closeout documents (O&M, training requirements, warranties, etc.) as required by the contract documents prior to NTP issuance.

9. **Conduct Pre-Construction Conference:** Schedule, coordinate and conduct pre-construction conference with General Contractor and all team members. Provide information with regard to reporting procedures, site rules/regulations and pre-construction survey prior to the start of construction.

d) **Construction Phase Services** includes but not limited to:

1. **Schedule Maintenance:** Evaluate, document and monitor through construction the Contractor’s short interval schedule and monthly updates to the baseline CPM schedule. Advise the District of schedule impacts and deviations from Contractor’s critical path.

2. **Cost Evaluation of Construction Change Orders:** Provide cost estimating services as needed for reviewing, reconciling and validating Contractor change orders for each project. Monitor the District's exposure on cost related changes.

3. **SWPPP and Erosion/Dust Control:** If required by a governing agency, make sure it is initiated and followed. Ensure that all erosion and dust control measures are followed by the Contractor.

4. **Agency and Public Utility Interface:** Act as point of contact for all public agency and utility coordination during construction.

5. **Project Record Documents:** Coordinate and expedite all activities in connection with the Contractors’ obligation to provide accurate record documents. Review to ensure that all revisions are incorporated into a single set of record documents on a monthly basis.

6. **Interim Housing:** Schedule and coordinate with District vendor all interim housing requirements to minimize disruption with the construction progress and any ongoing District activities. Coordinate all permits required for the delivery, installation and removal of the interim housing (no parking, closed streets, etc.) with the appropriate agencies. Perform pre and post occupancy reviews of IH conditions.

7. **Move Management:** Develop move matrix that identifies all moves on a room by room basis. Assist District in the coordination of all site related moves required by the project construction including the coordination and communication with Contractor, site staff, moving contractor and District PMs. Coordinate all moves with site staff to minimize
disruption to the school activities. Schedule District movers and obtain cost proposals from the District's pool of moving companies.

8. **Document Control:** Establish and implement procedures with the General Contractor for submittals, change orders, and requests for information. Maintain logs, files, and other necessary documentation in accordance with District standards and District provided construction management software.

9. **Shop Drawings & Submittals:** Review for completeness and monitor the status of all submittals, shop drawings and related correspondence to ensure all submittals are on schedule to avoid any construction delays.

10. **Construction Photographs:** Photograph construction on a weekly basis to document construction progress, unforeseen conditions, non-compliant work, etc. Upload and file digital photos with date stamp into District provided construction management software.

11. **Budgets:** Track all construction change order cost vs. budgets and report to the District on a regular basis. Forecast all predicted construction costs.

12. **IOR:** Coordinate work with Project Inspector of Record (IOR). Ensure that IOR daily field reports, inspection requests and inspection records are uploaded to project management software and current.

13. **Other District Consultants:** Assist in coordinating work, review time and materials invoices for IOR, moving companies, cleaning companies, industrial hygienist, materials testing firms and geotechnical firms.

14. **Design Changes:** Evaluate proposed document changes prior to issuance and make recommendations to the District for action when necessary. Follow up with A/E to ensure District approved change orders are submitted to DSA in a timely manner.

15. **Administration of the Construction Contracts:** Coordinate with District Labor Compliance Officer. Local Hire Administrator and Project Labor Agreement Manager if required.

16. **Daily Log:** Maintain on a daily basis an onsite project log indicating at a minimum, weather, contractor staffing of the construction work, construction progress, deliveries and any potential project delays. Collect and file copies of daily logs of the IOR, Contractor, Industrial Hygienist, Materials Testing Firm, Geotechnical Firm, Commissioning Agents and other relevant consultants. Notify project team if documents are not uploaded to construction management software.

17. **Project Reports:** Submit bi-monthly project reports that include a summary of: construction activities, critical issues, project delays, mitigation measures and bi-monthly project budget/cost/forecast reports updated to include recent change order information.

18. **Change Order Review:** Analyze and review all change order proposals to verify entitlement, purpose, scope and cost. Develop final change order, compile all backup, obtain all necessary signatures and forward to District for Board of Education approval. Forward all executed Change Orders to Architect for DSA approval.

19. **Contractor Claims:** Evaluate all claims and make written recommendations to the District on the most effective way to mitigate and/or resolve.

20. **Verified Reports:** Process and forward all verified reports to the Architect for submission to DSA.

21. **Project Meetings:** Coordinate, lead and document the weekly job-site progress meetings and any other meetings relevant to the project. Issue project meeting notes per District standards and distribute promptly.
22. **Payment Applications:** Compile payment requests and all other required documentation, verify correctness and forward to Architect and IOR for approval. Construction Manager to sign cover sheet stating the application has been reviewed and is recommended for payment.

23. **Labor Compliance:** Assist District Labor Compliance Officer in providing any requested Contractor reports. Coordinate the submission of the Contractor’s monthly certified payroll.

24. **Project Management Software:** Utilize District project management software to monitor/manage all project related documents such as RFIs, ASIs, submittals, drawings, photographs, correspondence and meeting notes. Monitor all logs to ensure that they are accurate and kept up to date.

25. **DSA Box:** Facilitate completion of uploading of interim and final reports/documents.

d) **Post Construction, Phase / Project Close-Out Services** includes but not limited to:

1. **Cleaning:** Ensure that Contractor provides cleaning services per the District contract requirements. Assist in procuring additional cleaning services if requested by District.

2. **Relocation/Move in:** Coordinate the arrival and installation of District furnished materials and FF&E. Provide coordination schedules for relocations required for the completion of construction, including interim housing.

3. **Training:** Schedule, coordinate and document all District training sessions with campus, maintenance and operations staff as required by contract documents.

4. **Punch lists:** At the end of each phase schedule punch walk and coordinate with Architect the development of a comprehensive punch list of incomplete or defective work. Monitor the schedule and completion of the punch list work. Verify completion of list items and receipt of confirmation that all defective work has been corrected.

5. **Record Documents:** Review contractual requirements for record documents. Coordinate with General Contractor and Architect to ensure that contract requirements are met.

6. **Project Closeout and Warranties:** Coordinate all required contract close-out documents and transmit to the District. This includes resolution of all project documents: RFIs, ASIs submittals, PCOs and COs. Provide all original contracts, submittals and close-out documents to the owner at the end of the project in hard copy (hard copies in binders and boxes) and electronic copy. Coordinate all required trainings with maintenance and school staff. Coordinate any commissioning/equipment start-up.

7. **OPSC/DSA Close Out:** Assist the Project Manager and Architect with project close out.

5. **Billing Rates**

   Provide the billing rates for the proposed staff that make up your core team. Employee types (billing line entries) need to clearly correlate with the project-specific titles, resumes and listing provided in section C.

Assume the following:

- Firm will provide computer and mobile phones for its team.

- Final selection of proposed staff is subject to District approval.

- District to provide a furnished field office during construction phase only.
6. Insurance Requirements
   a) Firms awarded contracts will be required to maintain in full force and effect, and at their own expense, the following insurance policies with companies certified with the California Insurance Commission. Please include the name of your Firm's/joint venture teams insurance company(s) in your proposal. The following insurance policies are required in order for your Firm/joint venture team to qualify for participation in this work:

   1. Worker’s Compensation Insurance - Statutory Limits
   2. Commercial General Liability Insurance - $2 million/occurrence
   3. Commercial Automobile Insurance - $1 million/occurrence
   4. Professional Liability Insurance - $2 million
   5. Pollution Legal Liability - $1 million
   6. Employers Liability - $2 million

   b) If any policy is written on a Claims Made Form, the consultant must provide a project specific policy to continue the coverage for ten (10) years beyond the date of the individual project completion.

   c) Prior to issuance of a Notice to Proceed, your firm must provide the District with fresh-wet signed certificate(s) of insurance that includes the following:

   1) A separate endorsement naming the San Francisco Unified School District, its Board, Officers and employees as additional insured parties on General Liability and automobile policies, endorsements must be submitted with the certificate(s);

   2) Should any of the above described policies be canceled before the expiration date thereof, the issuing company will mail 30 days written notice to the certificate holder.

B. SELECTION PROCESS
   The District wishes to create a pool(s) of Construction Management Firms from which it can assign specific projects. All SOQs will be scored through a preliminary screening process which will include Part C below and may include contact of references. Those firms who qualify through the preliminary screening process may be invited to participate in the final screening process, which may consist of an interview and presentation. Specific information regarding the final screening process will be provided upon notification of the firm completing the preliminary screening.

   The District reserves the right to make a selection anytime during the selection process in the event that the District can readily make a clear determination and selection from the proposals.

   The District reserves the right to contract with any firm responding to this RFQ for all or portions of the above-described phases, to reject any SOQ as non-responsive, and not to contract with any firm for the Services described herein. The District makes no representation that participation in the RFQ process will lead to an award of contract or any consideration whatsoever. The District reserves the right to seek SOQs from or to contract with any firm not participating in this process. The District shall in no event be responsible for the cost of preparing any response to this RFQ.

   Responses to this RFQ will become the property of the District and subject to the California Public Records Act, Government Code sections 6250, et seq. Those elements in each response that are trade secrets as that term is defined in Civil Code section 3426.1(d) or otherwise exempt by law from disclosure and which are prominently marked as “TRADE SECRET,” “CONFIDENTIAL,” or “PROPRIETARY” may not be subject to disclosure. The District shall not be liable or responsible for the disclosure of any such records including, without limitation, those so marked if disclosure is deemed to be required by law or by an order of the Court.
A firm that indiscriminately identifies all or most of its response as exempt from disclosure without justification may be deemed non-responsive. In the event the District is required to defend an action on a Public Records Act request for any of the contents of a response marked “Confidential,” “Proprietary,” or “Trade Secret,” the firm agrees, by submission of its response for the District’s consideration, to defend and indemnify the District from all costs and expenses, including attorneys’ fees, in any action or liability arising under the Public Records Act.

C. CONTENT OF PROPOSALS AND EVALUATION CRITERIA

Please provide the following information, in the order outlined below. SOQs will be carefully reviewed and assigned evaluation points based on the information you provide with a maximum score of 100 points in the categories indicated below:

1. **Introductory/Cover Letter (max length: 1 page (no points possible)).**
   Provide information regarding the size of your Firm, strengths and other special qualities of your team, and include key consultants that you propose to include as part of your project team (1 page, 0 points).

2. **Team Experience (max length: 10 pages and 30 points possible).**
   a. Discuss your team’s past experience over the last five (5) years of working on complex CA T-K thru K-14 school renovation programs (2 pages, 10 points).
   b. Provide a verifiable reference list of a minimum of five (5) programs performed under the name of the firm and/or team submitting. The reference list should include CA public school clients for whom your firm/team has provided similar Construction Management services for in the past ten (10) years. The Firm must have worked on programs totaling > $100 million for each reference listed. Include client contact name, email address, mailing address and telephone number(s) along with a brief description of services provided. (5 pages, 10 points).
   c. Provide a list of all completed CA T-K thru K-14 school programs, completion dates, and contact information of the lead person(s) reported to on these referenced projects. (3 pages, 10 points).

3. **Professional Qualification (max length: 10 pages, 30 points possible).**
   a. The full name and address of the firm or team. Name, email address and phone number of designated contact person with Company authority (1 page, 2 points)
   b. Conflicts of Interest: If applicable, provide a statement of any recent, current, or anticipated contractual obligations that relate in any way to similar work, the Project, or the District that may have a potential to conflict with firm’s ability to provide the Services described herein to the District. Firms cannot submit, propose, bid, contract, sub-contract, consult, or have any other economic interests in the Project to which the firm may provide Services. The firm selected to provide the Services and any subsidiary, parent, holding company or affiliate of the selected firm, may not perform any construction work or submit a bid for the Project (1 page, 3 points).
   c. A brief description of the firm including a Statement-of-Purpose. Include a description of typical services to clients provided by the Project Team (2 pages, 5 points).
   d. Describe professional qualifications and experience, including those of any proposed sub-consultants, in order to clearly demonstrate the ability to successfully furnish the scope of services described in this Request for Qualifications (2 pages, 5 points).
   e. Provide the names of the principal-in-charge, the assigned project managers and other key staff members who will comprise the core of your project team. In addition, identify any proposed sub-consultants who would be participating in the projects (1 page, 2 points).
   f. Firm’s Current Work Commitments. Specify the current and projected workload of Firm and describe Firm’s ability to complete the Services as required herein. Resume should identify the role that team member functioned on project (1 page, 3 points).
g. Provide brief resumes (1 page maximum per individual – not included against maximum total SOQ page count) for the key members of your project team, including any key sub-consultants. Please attach these resumes as exhibits at the end of the proposal (5 points).

h. Staffing/organizational chart – Explain your project team’s ability to deliver the necessary staffing required to successfully deliver construction management services for at least two (2) construction projects ($5 - $10M) running concurrently (2 pages, 5 points).

4. **Program Approach and Understanding (max length: 5 pages 30 points possible)**
   a. Discuss your firm’s understanding of the services required by the District’s Bond program and provide an outline or description that clearly demonstrates how your Project Team will approach the necessary tasks in order to meet the requirements for the program (2 pages, 10 points).
   
   b. Demonstrate ability to assist Architects in the design phase on similar Ca TK and K-14 programs with schedule and budget constraints. (1 page, 10 points).

   c. Early identification of potential problems/issues along with solutions or suggestions on how to mitigate the issues. Discuss typical problems/issues as CM and provide solutions (1 page, 5 points).

   d. Ability to fluctuate staff in order to meet project schedules or any unanticipated additional work. (1 page, 5 points).

5. **Billing Rates (suggested length: 1 page, 5 points possible).**
   Submit your team’s billing rates for the staff presented. Include, principal-in-charge, assigned project manager(s) and other key staff members who will comprise the core of your team’s project team.

6. **DVBE and Diversity Participation (suggested length: 1 page 5 points possible).**
   Describe how your team will encourage DVBE and diversity participation in these projects.

7. **Confidential Information (no page limit, no points possible)**
   In a separate sealed envelope provide with your SOQ 7 copies of:
   (For Joint Venture SOQs provide items a and b for each JV member firm)

   a. A statement of Firm’s financial resources. Include a certification of correctness of Firm’s statement of financial resources. This shall include a full set of financial statements for your most recent complete fiscal year accompanied by either an audit or review report prepared by an independent Certified Public Accountant. Compiled or internally prepared financial statements will not be accepted.

   b. Provide a complete listing of the formal (written) claims presented to the Firm, joint venture partners, outside consultants and/or subcontractors in the past five years. Include:
      i. The name of the claimant
      ii. A brief description of the claim.
      iii. The dollar value of the claim
      iv. Whether the claim was accepted, rejected, or if settlement of any type was made in full or part without admission of guilt or negligence. If handling of the claim is still in process, clearly indicate “resolution pending”.
      v. End the list with statement: “Under penalty of disbarment I certify this list to be complete and accurate.” Have the statement dated and signed by a company principal or senior representative. In the case that the firm, joint venture partners, outside consultants, and/or subcontractors as a group do not have any errors or liability claims presented in the past five years submit the statement “Under penalty of disbarment I certify that firms, joint venture partners, outside consultants, and/or
subcontractors represented by this Qualifications do not have any claims associated with errors or liability in the past five years.” Have this statement signed and dated by a company principal or senior representative.

c. A statement of **ALL** claim(s) filed against Firm in the past five (5) years. Briefly indicate the nature of the claim and the resolution, if any, of the claim(s).

MAXIMUM LENGTH OF PROPOSAL/SUBMITTAL: 28 pages, single sided

   Excluding resumes and confidential information

   MAXIMUM POINTS POSSIBLE: 100 points
<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Points</th>
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<tr>
<td>1. Introductory Cover Letter – 1 page limit</td>
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<td>2. Team Experience – 10 page limit</td>
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<tr>
<td>a. Discuss experience related to Ca Pre K and K-12 schools over the last 5 years</td>
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<td>that required participation of state and local agencies.</td>
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<td>b. Reference list of five (5) programs recently completed projects with</td>
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<td>construction value &gt; $100 M that will substantiate the firm’s ability to provide</td>
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<td>similar services on other Ca T-K and K-14 School programs in the last ten (10) years</td>
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<td>provide client contact name, email address, and brief description of services provided.</td>
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<td>c. List of completed Ca T-K and K-14 school programs with completion dates and</td>
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<td>contact information.</td>
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<td>3. Professional &amp; Team Qualifications – 10 page limit</td>
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<td>a. The full name and address of the submitting team. Name and contact</td>
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<td>information of a designated contact person with Company authority.</td>
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<td>b. Conflicts of interest</td>
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<td>c. Brief description of the team’s qualifications, including a statement of purpose</td>
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<td>and typical services to clients.</td>
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<td>d. Describe professional qualifications and experience, including those of any</td>
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<td>sub-consultants, in order to clearly demonstrate the ability to successfully</td>
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<td>and other key staff members who will comprise the core of your project team. In</td>
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<td>projects.</td>
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<td>f. Describe Firm’s current workload commitments.</td>
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<td>g. Brief resumes staffing of key team members</td>
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<td>h. Staffing/organizational chart – Explain your project team’s ability to deliver</td>
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<td>4. Program Approach &amp; Understanding – 5 page limit</td>
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<td>a. Discuss firm’s understanding of the services required by the District’s Bond</td>
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<td>program. Provide a description that clearly demonstrates how your Project Team will</td>
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<td>approach the tasks in order to meet program requirements.</td>
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<td>additional work.</td>
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<td>5. Billing Rates provided- 1 page limit</td>
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<td>6. DVBE Participation – 1 page limit</td>
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<td>7. Confidential Information – no page limit (separate envelop -financial &amp; claim</td>
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<td>statement)</td>
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<td>TOTAL SCORE</td>
<td>100</td>
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D. RFQ SCHEDULE
   1. RFQ SCHEDULE MILESTONES (Subject to Change)

   - Advertise RFQ                     December 12, 2016
   - Pre-Submittal Meeting             January 4, 2017 at 10:00 am
   - Written questions accepted up to: January 13, 2017
   - Addenda (if required) posted to web site by: January 20, 2017
   - SOQ Due                           January 27, 2017 no later than 2:00 pm
   - Shortlist Notification            February, 2017
   - Interviews                       March 2017
   - SFUSD Selection                  March, 2017

The District reserves the right, at its sole discretion, to modify RFQ requirements, cancel the selection process, amend the schedule, or selection process.

Proposers shall not be reimbursed for any costs associated with the preparation of proposals in response to this RFQ.

END OF REQUEST FOR QUALIFICATIONS