



**REQUEST FOR QUALIFICATIONS
PROPOSITION A 2016 BOND PROGRAM**

MECHANICAL ENGINEERING SERVICES

April 13, 2017



ANNOUNCEMENT

REQUEST FOR QUALIFICATIONS NOTICE SFUSD PROP A 2016 BOND PROGRAM

MECHANICAL ENGINEERING SERVICES

The San Francisco Unified School District (SFUSD) is accepting Statements of Qualifications (SOQ) for Mechanical Engineering services. SFUSD intends to retain Mechanical Engineering Firm(s) from which it can assign specific projects focused primarily on Mechanical Systems within the 2016 Proposition A Bond Program.

Proposals must be submitted to Room 207 at 135 Van Ness Avenue, San Francisco no later than:

2:00 p.m. on May 11, 2017.

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

- Public school experience in modernization of Early Education, Elementary, Middle and High Schools
- Experience modernizing Mechanical systems in historic and older (>50 yrs. old) school facilities
- Assessments of existing Mechanical systems leading to development of scope and budget
- Review of Mechanical Engineering design produced by others
- Familiarity with the Division of the State Architect's (DSA) procedures
- Developing phased construction plans for occupied facilities
- Construction administration services, including timely project closeout
- Adherence to project deadlines and schedules

RFQ packages will be available on the District website on April 13, 2017 at:

<http://www.sfusd.edu/en/doing-business-with-sfusd/current-rfps-rfqs-and-rfis.html>

The RFQ package will provide a detailed description of the information required for the SOQ submission. Any addenda issued will be posted on the website.

I. INTRODUCTION TO RFQ SUBMITTAL PROCESS

1. Overview

The San Francisco Unified School District Bond Program is seeking Statements of Qualifications (SOQ) from qualified Mechanical Engineering Firms to provide consulting services for the SFUSD Proposition A 2016 Bond Program.

- Five (5) bound copies in 8-1/2" x 11" format, one digital file of proposal
- Max. length of SOQ - 17 pages, single-sided (excluding resumes, references and billing schedules)

- Hand delivered to:

Fe Bongolan
Contract Administrator
San Francisco Unified School District
135 Van Ness Avenue, Room 207
San Francisco, CA 94102

All participating firms must have an established office primary business location under the name of the firm or joint venture for a minimum two years within a 25-mile radius of the city limits of San Francisco, CA.

ALL SOQs DUE NO LATER THAN 2:00 PM ON May 11, 2017.

LATE SUBMITTALS WILL NOT BE CONSIDERED

MAXIMUM POINTS POSSIBLE: 100

2. Description of Projects

The requested services will be funded through Proposition A 2016 Bond. The District may also elect to submit applications for State School Facility Modernization Program to supplement Prop A Bond funds. The SFUSD Prop A Bond work may consist of:

- Modernization of existing SFUSD facilities
- New School facilities
- Information Technology (IT) upgrades
- Nutritional Services projects

The District anticipates initial design work to commence in May 2017 with completion of all projects in six (6) years.

3. Methodology of Contracting for Mechanical Engineering Services

The selected Mechanical Engineering firms will be managed by the District PM's on all tasks. The Engineering Firms selected will be the Engineers of Record for their designated projects.

The District will determine final project assignments for the Mechanical Engineering Firm(s) and contracts will be awarded upon project assignments.

4. Description of Mechanical Engineering Scope of Services for Mechanical Engineering Consultants:

Assessment of existing facilities Mechanical systems and recording of deficiencies, design of upgrades of existing facility Mechanical , Mechanical design associated with new construction primarily additions to existing schools, work with historical preservation architects to provide heating systems in a way that is sensitive to historic building elements, boiler replacement, design of Mechanical elements and systems to maximize energy conservation, use of solar panels in heating and cooling systems. .

- Pre-design Phase
 - Meet with District or designated District Representatives and school site staff to determine and/or validate specific project needs.
Meet with various District departments including but not limited to: Buildings and Grounds, Department of Technology, Student Nutrition Services,
 - Meet with the District PM and Bond Management team to refine scope of work and establish the approved budget in order to proceed.

- Design Phases
 - Prepare design phase documents (SD, 100% CD) for submittal and review. For smaller projects drawings may proceed directly to CD's
 - The CD design package submitted to DSA shall be a fully coordinated and complete set of contract documents;
 - .For all projects provide an updated cost estimate at the end of the CD phase.
 - Participate in review of design documents with the School District, school site staff, PPDM, CM, local Fire Marshall (if required), DSA (if required) and representatives of other state or local agencies as needed.
 - If the project impacts operation of the school, work with PM to develop construction strategies which may include phased construction plans.
 - Coordinate District-provided drawings and reports as required. This includes, but is not limited to, existing drawings, and previous Mechanical system studies.
 - If the project will impact areas requiring hazardous material mitigation, incorporate hazmat mitigation documents provided by District's consultant into the final documents.
 - Prepare final set of plans and specifications for bidding;
 - Participate in bidding and bid review and analysis, which may include preparing addenda and obtaining DSA approval of addenda;

- Bidding and Construction Phase
 - Prepare final set of plans and specifications for bidding.
 - Participate in bidding and bid review and analysis, which may include preparing addenda
 - Conducting meetings and taking meeting minutes, as required. Assist in construction administration activities, including review of submittals, attendance at on-site meetings, responses to requests for information (RFI's), and review of contractor payment requests.
 - Participate in project close-out tasks, which will include the preparation of punch lists, the review of warranties and guarantees, and the review and approval of final contractor payments;
 - Final Close-out for the project
 - Preparation and review of record documents and electronic files.

Depending on the scale and scope of individual projects the District may at its discretion eliminate or streamline any of the above scope of work requirements.

5. District Responsibilities

- Any hazardous material ("hazmat") related work or mitigation thereof will be the sole responsibility of the District. The architect will coordinate the documents provided by the District's hazmat consultant into a complete package including the finish schedules;
- The District will be responsible for coordinating the bidding phase, including advertisement and distribution of bid documents.
- The District will be responsible for coordinating the administration of all contracts.
- The District will provide site topographic surveys and geotechnical reports as required.

6. Insurance Requirements

a). The Mechanical Engineering Firm(s) awarded a contract 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 insurance providers in your SOQ. The following insurance policies are required in order for your firm/joint venture to qualify for participation in these projects:

- 1) Commercial General Liability Insurance (\$1 million/per occurrence and \$2 million aggregate)
- 2) Automobile Insurance (\$1 million/per occurrence and \$2 million aggregate)
- 3) Professional Liability Insurance (\$2 million per occurrence and \$2 million aggregate)
- 4) Worker's Compensation Insurance in compliance with California law
- 5) Employee's Liability (1 million)
- 6) Pollution Legal Liability (\$2 million)
- 7) Worker's Compensation Insurance in compliance with California law
- 8) General Liability Insurance (\$2 million/per occurrence)

b). If any policy is written on a Claims Made Form, the consultant must provide a project specific policy to continue the coverage for five (5) years beyond the date of the individual project completion

c). Prior to issuance of a Notice to Proceed, each firm must provide the District with original wet signature certificate(s) of insurance that includes the following:

- The San Francisco Unified School District, its Board, Officers, and employees shall be named as additional insured parties on General Liability and Automobile policies, endorsements must be submitted with the certificate(s)
- Should any of the above described policies be canceled before the expiration date thereof, the issuing company will provide will mail 30 days written notice to the certificate holder

II. DISTRICT PROCESS FOR CONSULTANT SELECTION

The District wishes to have an Engineering design resource for projects that are primarily Mechanical in nature. This will typically be smaller projects than the typical full school modernization projects but may involve a number of smaller projects at multiple sites combined into one contract award. All SOQs will be scored through a preliminary screening process which will include Part III below and may include contact of references. Those firms who qualified 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 interview will be provided upon notification of the firm completing the preliminary screening.

The District will accept written questions and comments from prospective consultants for the period commencing on April 14, through May 1, 2017 close of business. No Addenda will be posted after May 8, 2017.

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 shall in no event be responsible for the cost of preparing any response to this RFQ. The District reserves the right to seek SOQs from or to contract with any firm not participating in this process.

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.

III. CONTENTS AND REQUIRED FORMAT OF PROPOSALS AND EVALUATION CRITERIA

Proposals shall be in 8 1/2" X 11" portrait format. Use Arial Narrow font text 11 pt. minimum size with standard margins. Please organize your proposal with 8 tabbed sections. Maximum page count is 17 single-sided pages excluding tabs, cover letter and resumes. Proposals shall be bound on the left.

Please provide the following information, in the order of the 8 sections given below, as well as the order of each component of each section. Each of the 8 sections shall be tabbed. Proposals will be carefully reviewed and assigned evaluation points based on the information provided with a maximum score of 100 points. All information requested must be provided, including sections which do not carry points. Failure to provide all information requested will be deemed non responsive.

Tab 1. Introductory/Cover Letter: (1 page; no points possible)

Please provide information regarding the size of your firm, and services provided

Tab 2. Firm Data (1 page; no points possible)

- a) The full name and address of the firm.
- b) Additional regional offices. If more than one office within the 25 mile radius requirement, list those offices, address and number of employees in the office(s) within the 25 mile radius requirement of this RFQ.
- c) 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.
- d) Name and phone number of a designated contact person
(Items a, b, c, d: 2 pages, no points possible)

Tab 3. Proposed Project Team Composition (Firms) (3 pages; 10 points possible)

Describe the Project Firm's professional qualifications and experience, including those of any sub consultants, if any, in order to clearly demonstrate your ability to successfully furnish the Mechanical engineering services described in this Request for Qualifications. (2 pages, possible points: 5)

1. Mechanical Engineering Firm
2. Cost Estimator
3. Others as may be required to meet requirements

Tab 4. Relevant Experience (5 pages; ½ page per item, 50 points possible)

Please discuss your Firm's experience and understanding of the Mechanical engineering services required for the projects within this bond program and provide an outline or description that clearly demonstrates:

1. Public school experience in modernization of Early Education, Elementary, Middle and High Schools including understanding of the unique challenges of educational facility design including interface with approval agencies and working with teachers and school administrators.
2. Experience with design and upgrade of all elements of school facility Mechanical systems.
3. Experience in the upgrade of Mechanical systems that are sensitive to historic and older facilities (>50 years)
4. Experience in working with city agencies as required to coordinate with and gain approval for Mechanical system upgrades
5. Assessment of existing Mechanical systems and development of findings and recommendations including associated costs
6. Review of Mechanical engineering designs produced by others
7. Development of phased plans for occupied facilities to allow for uninterrupted operation of the facility.

Tab 5. References (1 page; 10 points possible)

Provide a reference list of not less than 3 to 5 clients of the firm. This list should include projects which your firm has provided similar design services. (1 page, 5 points possible)

Tab 6. Representative Projects (5 pages 1 page maximum per project; 15 points possible)

Provide five representative projects your firm designed which have been completed (constructed) within the last 8 years. To the extent possible show projects which are primarily mechanical and were designed and managed by your firm as the engineer of record. Each project page should contain the following information: (1 page maximum per project, maximum pages: 5. (1/2 page, 3 points possible)

- Name of Project
- Name of client including contact information
- Completion (construction) date
- Total project budget,
- Description of services provided by the firm
- Images of the project (optional)

Tab 7. Project Team Staffing: (Resumes) (Not counted in page limitation. No resume should exceed 1 page per person; 15 points possible)

Please provide resumes of your proposed project team. Resumes should not exceed one-page per team member and highlight project experience relevant to the requirements of this RFQ

Tab 8. Firm's Billing Rate Schedule and name of Insurance company (1 page; no points possible)

- a. Please provide the billing rates for the staff presented in the organization chart(s) for the performance of the services indicated herein. Include; principal-in-charge.
- b. Extra Services. Provide a current fee schedule for the types of service that Firm offers which will be used for performance of Extra Services. If referencing basic services costs, include typical staffing expectations, professional fee schedules, and variations that the District could expect for specific services, if applicable
- c. Additional Costs. Identify any additional fees, costs, expenses or reimbursable fees for which Firm would be seeking compensation.
- d. Provide the name of your insurance carrier.

MAXIMUM LENGTH OF PROPOSAL/SUBMITTAL

17 pages, single-sided, excluding cover letter, tabs, and resumes

TOTAL POINTS POSSIBLE: 100 points

IV. RFQ SCHEDULE

. RFQ SCHEDULE

- Advertise RFQ Advertisement: **April 13, 2017**
- Written Questions Accepted **April 14 - May 1, 2017**
- Proposals Due no later than: **May 11, 2017 at 2:00 P.M.**
- Shortlist Notification: **May 26, 2017**
- Interviews (if required): **June May 2017**
- Results Announced: **June May 2017**

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

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

The District will be confirming accuracy of all information submitted in response to this RFQ.