



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

**PROGRAM PLANNING AND DESIGN MANAGEMENT  
SERVICES**

**NOVEMBER 2016**



## **ANNOUNCEMENT**

### **REQUEST FOR QUALIFICATIONS 2016 SFUSD PROP A SCHOOL BOND PROGRAM**

#### **PROGRAM PLANNING AND DESIGN MANAGEMENT SERVICES**

The San Francisco Unified School District is accepting Statements of Qualifications (“SOQs”) for Program Planning and Design Management Services (“PPDM”). Proposals must be submitted in Room 207 of 135 Van Ness Avenue, San Francisco no later than:

**2:00 p.m. on November 23, 2016**

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

- 1) California K- 12 school planning and modernization
- 2) Program level design management experience with School Bond Programs
- 3) Developing project assessments to establish project scopes, budgets and schedules
- 4) Renovation of older school facilities including access compliance, fire life safety, structural and IT upgrades
- 5) Providing cost estimates at key milestones, developing process for uniform project cost estimating including a rigorous cost reconciliation process that reconciles both AE and PPDM estimates at key points. Periodically determine and adjust cost escalation and other estimating factors.
- 6) Working with multiple departments within the District to establish District design guidelines that incorporate all departmental requirements.
- 7) Other services which may include, providing specialty consultants on behalf of the District, staff augmentation, project and program level scheduling, updating and distributing District Design Guidelines and Front End Specifications

**RFQ packages will be available online October 11, 2016:**

**<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 requirements for the submission. Any addenda issued to this RFQ will also be posted online.

**A pre-submittal conference will be held on October 17, 2016 at 2:00 p.m. in conference room 209 at 135 Van Ness Avenue, San Francisco. All Firms interested in submitting are strongly encouraged to attend.**

**The 2016 SFUSD Prop A Bond is subject to voter approval on November 08, 2016.**

## A. INTRODUCTION

### 1. Overview

The San Francisco Unified School District Bond Program is seeking Statement of Qualifications (“SOQ”) from consultants to provide planning and design management services from planning through the design development phase for projects included in the 2016 SFUSD Prop A Bond Program.

- SOQs - submit six (6) bound copies in 8-1/2" x 11" format.
- Length of SOQ - max 30 pages, single sided (excluding resumes, references and billing schedules).
- Hand deliver or mail the SOQs 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 participating Firms must have an established office within a **25-mile radius** of the city limits of San Francisco, under the name of the submitting Firm for a minimum 2 years

**ALL SOQS DUE NO LATER THAN 2:00 PM ON NOVEMBER 23, 2016**

**LATE SUBMITTALS WILL NOT BE CONSIDERED**

**MAXIMUM POINTS POSSIBLE: 100 points**

### 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. Description of Services

The submitting Firm must demonstrate experience which includes, but may not be limited to the following tasks:

- a) Preparation of overall program briefings and presentations
- b) Assist the District in evaluation of A/E fee proposals
- c) Establishing project assessment criteria to ensure continuity on all project assessments
- d) Assisting the District in managing the selected Architectural Firms in developing project assessments and establishing project modernization scopes, budgets and schedules
- e) Assessments of existing building systems to determine scope of work to repair or replace systems as needed. (These would include systems such as: mechanical, electrical power, lighting, information technology, data and fire alarms, kitchens, roofing and exterior windows)
- f) Review of Architects draft project assessments in terms of budget, scope and compliance to SFUSD standards

- g) Assisting the Architects in presenting project assessments packages to the District Bond Management Team for approval
- h) Assist the A/E Firms in securing the required approvals with State and Local agencies such as: SFFD, DSA, CGS, CDOE, DTSC, SFDPH and OPSC
- i) Tracking and updating of project and program level schedules at regular intervals
- j) Preparation of independent cost estimates of Bond projects at key points through design development.
- k) Working with independent cost estimators to periodically determine appropriate cost escalation and other estimating factors
- l) Reconciliation of Architect and PPDM cost estimate(s) including written analysis of scope and budget with the independent cost estimates
- m) Monthly project status reports including, project scope, budget and schedule updates and cost projections
- n) Assist the District in updating, maintaining and issuing the District design guidelines and front end specifications
- o) Participation in meetings with District Representatives and school site staff to review specific facility and program needs at a particular school and preparation of meeting notes
- p) Participation in presentations to local community as needed
- q) Architectural and engineering peer review of design documents at schematic and design development phases. And other reviews with the District and its representatives, the Architect, DSA and representatives of other State or Local agencies as needed
- r) Utilizing project management software systems (selected by the District) and providing support and training to the project Firms on the selected project software
- s) Smooth transition and handoff of design management responsibilities to the construction management Firms after the project assessment, schematic design and design development phase is completed
- t) Project managers assigned to individual projects as necessary to assist the District in management of program workload
- u) Any other services that may be required such as; cost estimates, procedures manual, reports, building materials and product research, augmentation of District staff needs, etc.

#### **4. Assumptions Related to Project Scope of Work**

- a) The District will be responsible for providing surveys and geotechnical reports for each project.
- b) The District will procure environmental analysts and specialty consultants as needed.
- c) If an Architectural Firm (including participation in a joint venture) is selected for the PPDM, they will be excluded from providing Architectural services for the 2016 Prop A Bond Program

## **5. Billing Rates and other cost related data**

Provide the billing rates for the proposed staff that make up your core Firm using the following assumptions:

- a) The District anticipates approximately 5 to 7 fulltime project management level staff, and on site program manager will be needed to deliver the services for this contract. The level of staffing will fluctuate as the program progresses
- b) The District anticipates 2 to 5 months to complete each project assessment
- c) Project schematic design and design development phases will vary dependent on size and scope, but assume an average of 6 – 8 months (for both phases) per project
- d) District will provide work space at the 135 Van Ness office for the project level staff assigned to the SFUSD program. Parking is not provided
- e) Consultant will provide computer and mobile phones for its Firm
- f) Final selection of proposed staff is subject to District approval and passage of the 2016 SFUSD PROP A Bond by the voters

## **6. Insurance Requirements**

- a) The Firm 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 Firm's insurance company in your proposal. The following insurance policies are required in order for your Firm/joint venture Firm to qualify for participation in this work:
  - 1) Worker's Compensation Insurance
  - 2) General Liability Insurance(\$ 1 million/per occurrence)
  - 3) Automobile Insurance (\$1 million/per occurrence)
  - 4) Professional Liability Insurance (\$5 million Firm/joint venture /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 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 policies, endorsements must be submitted with the certificate;
  - 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

All SOQs will be scored through a preliminary screening process outlined in section C along with verification of reference contacts. Those Firms who qualified through the preliminary screening process may be invited to participate in the final screening process which will consist of an interview and/or presentation. Specific information regarding the interview will be available upon notification of the Firm completing the preliminary screening.

One (1) Top ranked Firm will be awarded the contract upon successfully completing the selection process.

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 points based on the information provided with a maximum score of 100 points as indicated below:

**1. Introductory/Cover Letter (suggested length: 1 page (no points possible)).**

Provide information regarding the size of your Firm, strengths and other special qualities of your Firm, and include key consultants that you propose to include as part of your project Firm.

**2. Firm Experience (suggested length: 10 pages (30 points possible)).**

- a) Discuss your Firm's past experience over the last five (5) years of working on complex CA Pre K and K-12 school renovation programs that required the participation of state and local agencies (such as; DSA, CGS, OPSC, CDOE, CEQA, SFDPH).
- b) Provide a verifiable reference list of a minimum of five (5) programs performed under the name of the Firm and/or joint venture team submitting. The reference list should include clients for whom your Firm/and or joint venture has provided similar services for in the past five (5) years. Each reference listed must have a total construction value > \$100 million dollars. Include client contact

name, email address, mailing address and telephone number(s) along with a brief description of services provided.

- c) Provide a list of all completed CA Pre K and K-14 school programs completed in the last 10 yrs. Include completion dates, and contact information for the lead person(s) your Firm or joint venture reported to on these referenced projects.
- d) 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.
- e) 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.
  - i. 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.
  - ii. 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.

**3. Professional Qualifications (suggested length: 12 pages (40 points possible)).**

- a) The full name and address of the submitting Firm and name and phone number of a designated contact person with Company authority
- b) A brief description of the Firm's qualifications, including a statement of purpose. Include a description of typical services to clients
- c) Provide a statement describing the respondent's professional qualifications and experience, including those of any sub-consultants, to clearly demonstrate the Firm's ability to successfully deliver the scope of services described in this RFQ.
- d) Provide a statement of Firm's financial resources. Include a certification of correctness of Firm's statement of financial resources (provide in a separate sealed envelope).
- e) Provide 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).
- f) Include letters of reference or testimonials, if available. Firm should limit letters of references or testimonials to no more than ten (10).
- g) Provide the names of the on-site program manager, the assigned project managers and other key staff members who will comprise the core of your project team. In addition, identify and proposed sub-consultants who will participate in the projects. At a minimum this should include the onsite core team, architectural and engineering design review staff and cost estimator(s).
- h) Provide brief resumes (**2 page maximum per individual**) for the key members of your project Firm, including any key sub-consultants. Please attach these resumes as exhibits at the end of the proposal. Resumes will not be counted as part of the 30 page maximum. Resumes should identify Firm members' responsibilities/roles and not simply a list of projects worked on

- i) Indicate ongoing commitment to professional education of staff, total number of permanent employees, and any other data that may assist the District in understanding Firm's qualifications and expertise

**4. Program Approach and Understanding (suggested length: 5 pages (30 points possible))**

- a) Discuss Firm's understanding of the services required by the District's Bond program that clearly demonstrates how your Firm will approach to meeting the requirements for the Bond Program
- b) Describe Firm's ability to assist the District in managing the preliminary design phases on similar CA T/Pre K and K-14 programs with schedule and budget constraints
- c) Describe Firm's ability to fluctuate staff in order to meet project schedules or any unanticipated additional work
- d) Describe Firm's ability to proactively identify potential risks along with solutions or suggestions on how to mitigate them
- e) Describe Firm's ability to develop and maintain District design guidelines, program procedures, and program controls

**5. Billing Rates (suggested length: 1 page (0 points possible))**

- a) Submit your Firm's hourly billing rates for the staff presented in performance of the Services indicated herein. Include, on-site program manager, assigned project manager(s) and other key staff members who will comprise the core of your Firm's project team
- 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

**All requirements listed above in C (1-5) must be included in the SOQ in order for the submittal to be considered complete and accepted for review. Failure to include all requested information will result in a rejected SOQ.**

## 6. EVALUATION CRITERIA SCORING SHEET

<b>C. Evaluation Criteria - All Mandatory Requirements</b>	<b>Points</b>	<b>Score</b>
<b>1. Introductory Cover Letter</b>	<b>0</b>	
<b>2. Firm Experience</b>	<b>30</b>	
a) Discuss experience related to CA Pre K and K-14 schools over the last 5 years that required participation of state and local agencies b) Reference list of five (5) K-14 programs (in the last ten (10) years) with a construction value >\$100 million dollars that will substantiate the Firm's ability to provide similar services c) List of completed CA T/Pre-K and K-14 school programs with completion dates and contact information d) Current workload commitments and ability to adequately staff for March 2017 e) Conflict of interest statement	<i>Poor: 0-10</i> <i>Marginal: 11-17</i> <i>Acceptable: 18-25</i> <i>Exceeds: 26-30</i>	
<b>3. Professional &amp; Firm Qualifications</b>	<b>40</b>	
a) Contact info for Firm and contact person with contractual authority b) Statement of purpose describing qualifications of the Firm c) Discussion of Firms approach to meeting program requirements d) Financial Statement (in separate sealed envelope) e) Statement of all claims (past 5 years) f) Provide letters of reference - no more than 10 g) Provide list of key Firm members - program manager, project managers, support staff and consultants h) Resumes of key staff i) Misc. Firm information	<i>Poor: 0-10</i> <i>Marginal: 11-17</i> <i>Acceptable: 18-25</i> <i>Exceeds: 26-30</i>	
<b>4. Program Approach &amp; Understanding</b>	<b>30</b>	
a) Understanding of School District program requirements. b) Demonstrated ability to assist Architects in the preliminary design phases on similar Ca T/Pre K and K-14 programs under schedule and budget constraints. c) Staff capacity and flexibility to meet project schedules, including any unexpected work delays. d) Ability to identify potential risks and possible mitigation measures. e) Develop and maintain program controls, design guidelines and program procedures.	<i>Poor: 0-10</i> <i>Marginal: 11-17</i> <i>Acceptable: 18-25</i> <i>Exceeds: 26-30</i>	
<b>5. Billing Rates provided</b>	<b>0</b>	
<b>TOTAL SCORE</b>		<b>0-100</b>

**D. RFQ SCHEDULE**

This Request for Qualifications is being advertised in advance of the November 2016 Election in order to maintain an aggressive schedule for the planned work. The San Francisco Unified School District reserves the right to withdraw this RFQ at any time. Proposers shall not be reimbursed for any costs associated with the preparation of proposals to this RFQ.

**RFQ SCHEDULE MILESTONES (Subject to Change)**

- |   |  |
|---|--|
| ▪ Advertise RFQ   | October 11, 2016                           |
| ▪ RFQ Informational Workshop<br>(135 Van Ness Avenue, Room 209) | October 17, 2016 at 2:00 PM                |
| ▪ Written questions accepted                                    | October 17 - October 21, 2016              |
| ▪ Addenda (if required) posted to web site                      | after Nov 1, 2016                          |
| ▪ BOND ELECTION   | November 8, 2016                           |
| ▪ <b><u>SOQ Due Date</u></b>                                    | <b><u>November 23, 2016 at 2:00 pm</u></b> |
| ▪ Shortlist Notification  | December 2016                              |
| ▪ Interviews  | January 2016                               |
| ▪ SFUSD Board Approval  | February 2016                              |

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 DOCUMENT*