



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

**INFORMATION TECHNOLOGY
CONSULTING SERVICES**

December 2016



ANNOUNCEMENT

REQUEST FOR QUALIFICATIONS NOTICE SFUSD PROP A 2016 BOND PROGRAM

INFORMATION TECHNOLOGY CONSULTING SERVICES

The San Francisco Unified School District (SFUSD) is accepting Statements of Qualifications (SOQ) for Information Technology Consulting Services to facilitate the programming and development of execution strategies for on-going upgrades of SFUSD Department of Technology (DoT) infrastructure capabilities District-wide. This constitutes the Department of Technology (DoT) portion of the 2016 Proposition A Bond Program.

Proposals must be hand-delivered to Room 207 at 135 Van Ness Avenue, San Francisco:

No later than 2:00 p.m. on January 13, 2017

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

- Strong public school experience in modernization of IT infrastructure for Early Education, Elementary, Middle and High Schools
- Experience in modernizing IT infrastructure at historic and older (>50 yrs. old) school facilities
- IT infrastructure assessments of existing facilities leading to development of scope and budget
- Developing master plans for IT infrastructure and future technology needs
- Experience in developing IT Standards for school facilities

RFQ packages will be available on the District website on December 1, 2016 at:
<http://www.sfusd.edu/en/doing-business-with-sfusd/current-rfps-rfqs-and-rfis.html>

The RFQ 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 Information Technology (IT) Firms to provide IT consulting services for the SFUSD Proposition A 2016 Bond Program. Submittal shall include the following:

- Seven (7) bound copies in 8-1/2" x 11" format
- Max. length of SOQ - 18 pages, single-sided (excluding tabs, resumes, references and billing schedules)
- Digital file of proposal, in PDF format, provided on a flash drive.
- Supporting materials in sealed envelope (financial statement and statement of claims)
- Hand delivered to:

Maureen Shelton
Bond Program Director of Construction
San Francisco Unified School District
135 Van Ness Avenue, Room 207
San Francisco, CA 94102

Direct all comments or questions regarding this RFQ to:

Fe Bongolan
Bond Program Contracts Administrator
bongolanf@sfusd.edu
415.241.4315
San Francisco Unified School District
135 Van Ness Avenue, Room 207
San Francisco, CA 94102

All participating IT Firms must have an established office or primary business location under the name of the firm or joint venture for a minimum two years within the state of California. Additional evaluation points are available if the Firm has an office located within a 60-mile radius from the city limits of San Francisco.

ALL SOQs DUE NO LATER THAN 2:00 PM ON JANUARY 13, 2017

LATE SUBMITTALS WILL NOT BE CONSIDERED

2. Methodology of Contracting for IT Consulting Services and Basis of Fees

The District will select one Firm to complete all the tasks listed in the Scope of Work outlined in Section I., 3. below.

Fees shall be generally based on the Firm's standard billing rates as submitted in the proposal and shall be negotiated as a fixed fee for entire scope of work described.

3. Description of IT Consultant Scope of Services:

The San Francisco Unified School District (SFUSD) is seeking a consultant to facilitate the programming and development of execution strategies for on-going upgrades of SFUSD Department of Technology (DoT) capabilities District-wide. The consultant selected will become an integral member of the SFUSD DoT bond team in system-wide planning, assessment of the existing DoT systems, support and evaluation of current technology enhancement concepts, advancement of alternate concepts, and development of IT standards and master plans for both short term and long term technology goals.

The successful consultant shall demonstrate a record of similar projects which display a capability to develop a vision, master plan, and specific design related to execution of the master plan. Similar experience with other K-12 school districts or other educational environments is required. Services shall also require a record of development of reliable budgets for the execution of master plans. Budgetary development should include both hard construction costs as well as soft costs such as design, and overall program and project management costs. Cost estimates shall also include all associated equipment identified. The scope of services may include the following activities.

A. PHASE I: ORIENTATION and CONSULTANT INPUT

1. Evaluation of current program, standards and vision of the SFUSD Department of Technology
2. Development of a District IT master plan and recommendations to support long-term technology design and modernization.
3. Development of comprehensive IT District Standards and Specifications
4. Confirmation of the district goals and outcomes for digital learning experiences (e.g., 1:1 computing, personalized learning, and blended learning) and assistance to SFUSD Department of Technology with identifying solutions that will address these initiatives,
5. Integration of consultants suggestions/enhancements to the current vision

B. PHASE II: ASSESSMENT AND STANDARDS/PROTOTYPE DEVELOPMENT

1. Identification of current, general IT Facility infrastructure, including detailed assessments of overall capabilities and deficiencies.
2. Development / identification of IT requirements for prototypical facilities within the District. This will likely include a series of models for:
 - a. Early Education Schools
 - b. Elementary Schools
 - c. Middle Schools (including K-8 schools)
 - d. High Schools
 - e. SFUSD Administrative/office facilities
 - f. Miscellaneous support facilities

3. Field assessment of IT facility infrastructure at a number of facilities throughout the district. Assume this number of facilities will be in the range of 75 to 90 sites including early education schools, elementary schools, middle schools, high schools and a variety of administrative and warehouse support facilities.
4. Preparation of project assessment report, including listing of sites by priority, and development of a scope of work for sites utilizing the prototypical models developed in item 2 above. This will include use of IT Standards as well as additional work required such as painting/patching, electrical and HVAC upgrades, space reconfiguration, etc)

C. PHASE III: COST DEVELOPMENT AND IMPLEMENTATION STRATEGIES

1. Development of cost estimates associated with project scopes of work.
2. Coordination and assistance to the SFUSD Department of Technology and the SFUSD Bond Program to develop a district-wide execution plan including budget, schedule, risk mitigation, project management, communications, stakeholder engagement, and procurement strategies for execution of work (design-bid-build, design-build, etc.)

D. PHASE IV: MASTER PLAN IMPLEMENTATION SUPPORT

1. Review design documents developed by others for each site, to ensure that design intent is adhered to (quality control).
2. Participate in project status meetings and ongoing planning/design sessions
3. Additional services as may be required, which may include construction inspection.
4. Construction site visit to confirm conformance with design documents.

The selected consultant will be precluded from producing design documents meant for construction for any sites associated with the services of this contract.

The SFUSD Department of Technology reserves the right to expand or contract this scope of work as required to meet the needs of the district.

4. Insurance Requirements

a). Each architectural Firm or each member of joint ventures awarded a contract will be required to 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) Worker's Compensation Insurance in compliance with California law
- 2) Commercial General Liability Insurance (\$2 million per occurrence)
- 3) Commercial Automobile Insurance (\$2 million per occurrence)
- 4) Professional Liability Insurance (\$2 million per occurrence and \$2 million aggregate)
- 5) Employment Practices Liability (\$2 million per occurrence)
- 6) Pollution Legal Liability (\$1 million per claim and \$2 million aggregate limit)

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

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 November 23 through December 9, 2016 close of business. Addenda will be posted after December 9, 2016.

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 5 tabbed sections. Maximum page count is 18 single-sided pages excluding tabs, resumes, references, and billing schedules. Submit seven (7) bound copies of the SOQ, plus one digital copy. Proposals shall be bound on the left.

In a separate sealed envelope provide Firm's statement of financial resources and Firm's statement of claims.

Please provide the following information, in the order of the five sections given below, as well as the order of each component of each section. Each of the five sections shall be tabbed. Proposals will be carefully reviewed and assigned evaluation points based on the information provided with a maximum score of 60 points. All information requested must be provided, including sections which do not carry points. **Failure to provide all information requested shall be deemed non-responsive.** The five categories of the SOQ are:

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

Please provide information regarding the size of your Firm, and include any sub consultants that you propose to include as part of your team, if necessary.

2 **Professional Qualifications and Experience – Firms and Projects:** (16 pages maximum; possible points: 50)

- a) The full name and address of the firm or team. (no points possible)
 - b) List all office locations within the State of California, and note the primary location which will be providing the services. If at least one office is located within a 60-mile radius of the city limits of San Francisco, up to two additional evaluation points may be awarded. (2 points possible)
 - 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. (no points possible)
 - d) 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, subcontract, 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. (no points possible)
 - e) Name and phone number of a designated contact person. (no points possible)
- (Items a, b, c, d, e: 2 pages)
- f) A brief description of the firm including a Statement-of-Purpose. Include a description of typical services to clients of the Project Team (1 page; possible points: 5)
 - g) Describe the Firm's professional qualifications and experience, including those of any sub consultants, in order to clearly demonstrate your ability to successfully furnish the consulting services described in this Request for Qualifications. (2 pages; possible points: 5)

- h) Please discuss your Firm's experience and understanding of the consulting services required for these projects (primarily renovation and modernization scope) and provide an outline or description that clearly demonstrates:
1. **Information Technology (IT):** Discuss your experience in the planning, design, and implementation of current IT standards and systems for various clients, with emphasis on the need for flexibility to address constantly changing technology needs. (1 page; possible points: 5)
 2. **School Modernization Experience** – understanding of the unique challenges of IT infrastructure modernization of educational facilities, citing specific issues and solutions. Address challenges of older or historic buildings. Describe your experience with the planning and design of 21st century learning environments. Describe experience with E-rate programs, and any other special credentials or relevant experience. (1 page; possible points: 5)
 3. Your firm approach to **assessing and documenting existing conditions** for IT infrastructure modernization projects; (1 page; possible points: 5)
 4. Describe your experience with and understanding / coordination of various **funding opportunities**, including E-rate programs, state bond funding, public and private donations or partnerships, technology grants, etc., in order to maximize funds for the District. (1 page; possible points: 5)
- i) Provide a reference list of not less than 4 to 6 clients of the firm. This list should include projects which your firm has provided similar services for CA K-12 projects during the past four years and must include one (1) client with a completed project in the Bay Area. This reference list should include the clients' names, addresses and telephone numbers and a brief description of each project, with a clear focus on K-12 public schools and modernization work. The District mayor may not contact all of those listed on the reference list. (1 page; possible points: 4)
- j) Provide a minimum of three (3) representative projects for which your Firm has been the IT consultant and where services were provided within the last 5 years. Each project may use up to one full page and should contain the following information: (maximum pages: 6; possible points: 6)
- a. Name of project
 - b. Name of client including contact information
 - c. Description of services provided by the firm
- k) Provide the names and brief resumes of the principal-in-charge, the assigned project manager and/or other key staff members who will comprise the core of your firm's project team. Identify the number of IT specialists on your staff. Also, provide brief resumes for any identified sub-consultants. Provide a narrative discussing your approach to staffing, sub-consultant management and delivering timely and quality service on two or more assignments running concurrently. (8 points possible)

3 **Firm's Billing Rate Schedule and name of insurance companies:** (no page limit; possible points: 5)

- a. Please provide the billing rates for the staff presented in Section III., 2., k), above, 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, travel expenses, or reimbursable fees for which Firm would be seeking compensation.
- d. Provide the name of your insurance carrier.

4 **Confidential Information** (no page limit; no points possible)

In a separate sealed envelope, provide with your SOQ, one (1) copy of:

- 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.

For Joint Venture SOQs provide items a) and b) above for each JV member firm.

5 **Diversity, Inclusion and Equity** (1 page; possible points: 5)

Describe your Firm’s approach to the core San Francisco and SFUSD values of diversity, inclusion and equity, and your understanding of SFUSD’s mission statement, “**Every day we provide each and every student quality instruction and equitable support to thrive in the 21st century**”, and how your Firm can contribute to that mission. (1 page; possible points: 5)

MAXIMUM LENGTH OF PROPOSAL/SUBMITTAL: 18 pages, single-sided,
excluding tabs, resumes, references, and billing schedules.

TOTAL POINTS POSSIBLE: 60 points

EVALUATION CRITERIA SCORING SHEET

Evaluation Criteria	Points	Score
1. Introductory Cover Letter	0	
2. Professional Qualifications and Experience	--	
a) The full name and address of the firm or team b) Office locations (2 points possible) c) Firm's Current Work Commitments d) Conflicts of Interest e) Name and phone number of a designated contact person	2	
f) A brief description of the firm including a Statement-of-Purpose. Include a description of typical services to clients of the Project Team	5	
g) Firm's professional qualifications and experience	5	
h) Firm's experience and understanding of the consulting services required for these projects 1. Information Technology (IT): (1 page; 5 points) 2. School Modernization Experience (1 page; 5 points) 3. Firm approach to assessing and documenting existing conditions (1 page; 5 points) 4. Experience with funding opportunities (1 page; 5 points)	20	
i) Reference list of not less than 4 to 6 clients of the firm.	4	
j) Provide minimum of (3) representative projects	6	
k) Provide core team resumes	8	
3. Firm's Billing Rate Schedule and name of insurance carrier	5	
4. Confidential Information (1 copy, separate envelope)	0	
5. Diversity, Inclusion and Equity	5	
TOTAL SCORE	60	

Maximum possible points: 60 points

IV. RFQ SCHEDULE (Subject to change)

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 Advertisement: **December 1, 2016**
- RFQ Informational Workshop: **December 16, 2016 at 1:30 p.m.**
- Written Questions Accepted **December 1 - 21, 2016**
- Proposals Due no later than: **January 13, 2017 at 2:00 p.m.**
- Shortlist Notification: **January 2017**
- Interviews (if required): **February 2017**
- Results Announced: **February 2017**
- SFUSD Board Approval: **March 2017**

The District reserves the right, at its sole discretion, to modify RFQ requirements, cancel the selection process, and/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.