

Elk Grove Unified School District
9510 Elk Grove-Florin Road
Elk Grove, CA 95624

**Request for Proposals for
Professional Services**

Preparation of Education Specifications

RFP Issued: October 24, 2017
Proposal Submission Due: November 14, 2017, by 4:00 PM

Submission address:

Elk Grove Unified School District
Facilities & Planning Department
9510 Elk Grove-Florin Road, Room 206
Elk Grove, CA 95624





Request for Proposal (RFP) for Professional Services

Preparation of Education Specifications

The Board of Education (the “Board”) of the Elk Grove Unified School District (“District”) is seeking proposals from qualified consultant firms or teams (“Proposer”) to prepare an update to the District’s Education Specifications, as it undertakes major modernization of existing schools, construction of new schools, implementation of EGUSD’s 2016 Facilities Master Plan and related projects.

I. Critical Dates and Other Information

Proposal Due Date:

Receipt of submission packages containing 4 printed copies and one searchable electronic copy (.pdf format) of proposals are due by **4:00 PM on Tuesday, November 14, 2017**, to

Bill Heinicke
Elk Grove Unified School District
Facilities & Planning, Room 206
9510 Elk Grove-Florin Road
Elk Grove, CA 95624

Late proposals will not be accepted. Proposals submitted shall be sealed in an envelope or box, with proper identification on the outside of the submittal package.

RFP Evaluation:

All accepted submissions will be reviewed and graded by the District. On or before November 28, 2017, Proposers will be notified of the results and a preliminary schedule of interviews with advancing Proposers will be set. The District will determine, at its sole discretion, the number of advancing submissions.

Interviews:

The District will schedule interviews with qualifying proposers to occur during the weeks of December 4th and/or December 11th, 2017. Interviews will be held at Elk Grove Unified School District, 9510 Elk Grove-Florin Road, Elk Grove, CA 95624, in the Facilities and Planning Department, Room 206.

Proposers are encouraged to notify the District of their interest in order to receive updates and other communication from the District during the selection process.

Firms currently on the District’s Board Approved Consultants list are not eligible to respond to this RFP.



The District reserves the right to change, reduce or otherwise modify the selection process and the critical dates.

II. Background

The Elk Grove Unified School District was established in 1959 and today educates over 63,000 students at over 65 school sites, from pre-kindergarten through high school and adult education. The District's 320 square miles include the entire city of Elk Grove and parts of the cities of Sacramento and Rancho Cordova as well as portions of Sacramento County. The District employs over 6,000 people. The District has seen significant growth in the last 25 years, and has the potential for extensive growth in the future. The District is also committing substantial resources to the maintenance and upgrading of its existing facilities.

The District's current education specifications were composed in 1995 and have been periodically updated.

III. Project Description

The District seeks to engage an education specification consultant to lead and facilitate the preparation and publication of Education Specifications for elementary schools (pre-K thru 6th grade) and secondary schools (7th grade thru 12th grade, adult education).

The education specifications will provide a narrative and accompanying diagrams to fully describe the physical facilities desired by the District to house, shelter and support the District's education activities and program. The District will establish an education specification committee reflecting the District's diverse community and dedicated workforce.

The education specifications will describe new construction and modernization or other modifications to existing school facilities.

The District has needs in excess of its limited resources and must prioritize the facilities it provides. The education specifications must provide a prioritized ranking of the facilities and features the District desires.

V. Response to this Request For Proposal

Responses to this RFP are limited to 30 pages, exclusive of tabs and covers. Please number pages sequentially 1 through 30. Responses must address the items in the order listed below. Please tab each section of the submittal to correspond to the major section numbers shown.

1. Cover letter

Not weighted – for information only



2. Organization, History, Business Relationships Weighted value – 5%
- a. Current Organization and Structure of the Business
 - i. Date firm was established, brief organization history
 - ii. Type of business, corporation, etc.; organized in what state
 - b. History of the Business and Organizational Performance:
 - i. Has there been any change in ownership of the firm at any time during the last five years? If yes explain ownership change.
 - ii. Is the firm a subsidiary, parent, holding company or affiliate of another firm in related business trades? If "yes" explain the relationship.
 - iii. Was the firm in bankruptcy at any time during the last five years? If yes, provide a copy of the bankruptcy petition, showing the case number and the date on which the petition was filed, and a copy of the Bankruptcy Court's discharge order, or other document that ended the case if no discharge order was issued.
 - c. Disputes:
 - i. Has your firm had a contract or agreement for professional services terminated within the last five years? If yes, explain the circumstances under which this occurred.
 - d. Criminal Matters and Related Civil Suits:
 - i. Has your firm or any of its owners, officers, or partners ever been found liable in a civil suit or found guilty in a criminal action for making any false claim or material misrepresentation to any public agency or entity? If yes, explain the circumstances under which this occurred.
 - ii. Will all project team members who will be on school sites be able to meet State of California fingerprinting requirements?
3. Experience Weighted value – 25%
- a. How many education specification preparation projects has your firm completed? How many of those were in California?
 - b. How many years has your firm worked on K-12 school projects within the state of California?
 - c. Describe experience preparing education specifications; highlighting no more than 3 projects as examples. Include client, project scope, dates, role of key personnel, and client's primary contact information for reference.
4. Key Personnel Weighted value – 20%
- a. List relevant experience for each of the proposed key personnel and describe their role, specific activities and responsibilities performed in the 3 projects presented in Section 3.
 - b. List relevant experience and describe their role, specific activities and responsibilities performed for each of the proposed key personnel who may not have participated in the 3 projects presented in Section 2.



- c. Describe the role each of the proposed key personnel will perform if this proposal is accepted.
- d. Identify licenses and professional affiliations.

5. Scope of Work

Weighted value – 35%

A basic outline of the Scope of Work follows. Please describe your approach to accomplishing the following:

- a. Develop a workplan with milestones for the simultaneous preparation of each Education Specification.
- b. Assist the District in the composition of the Education Specification Committee(s) for Elementary and Secondary Education Specifications, and sub-committees if needed.
- c. Become familiar with the District's existing facilities, demographics, standards, guiding principles, enrollment projections, Facility Master Plan and related documents.
- d. Lead and facilitate Education Specifications Committee workshops:
 - i. Establish purpose and goals.
 - ii. Identify major facility features and concepts, such as shelter, comfort, safety, security, sustainability, flexibility, community use and other considerations.
 - iii. Present examples and describe the desirable features they employ.
 - iv. Lead the committees to consensus and conclusions.
 - v. Provide data and supporting information as needed to inform the committee's decision-making process.
 - vi. Encourage exploration and investigation of concepts.
 - vii. Lead other activities, tours, photo presentations, exercises, etc. as appropriate to the preparation process.
- e. Prepare detailed specifications for each instructional or activity space.
- f. Describe internal and external spatial relationships for each functional area.
- g. Define the relation between instructional activities and the *space requirements* needed to properly house those activities.
- h. Define the relation between instructional activities and the *building features, equipment and fixtures* needed to properly support those activities.
- i. Prepare descriptions of the facility characteristics for each functional area.
- j. Evaluate considerations that impact space requirements and costs.
- k. Utilize the participation of District architects, some of whom will participate in the Education Specification preparation process as they begin work on new projects.
- l. Timeframe: the District anticipates allowing 6 months for the completion of this work, subject to input from the selected Proposer.

6. Proposal Fee

Weighted value – 15%

- a. Please provide a breakdown of the proposed fee for the total project, based on the scope of work as outlined in this RFP and described in response to it. Subject to agreement by the District and the selected consultant on the final scope of work, actual fees may be different.



- b. Include firm's current rate sheet.
- c. Provide a proposed fee per the following breakdown:
 - i. Initial process planning & organization \$ _____
 - ii. Workshop facilitation \$ _____
 - iii. Education Specification document preparation \$ _____
 - iv. Reimbursable expenses \$ _____
 - v. Total \$ _____

VI. Selection Process

The proposals will be evaluated and scored by an evaluation panel of individuals selected by the District. Proposals will be evaluated based upon the criteria listed above.

The District will interview Proposers which advance from the initial submissions. In addition to a question and answer portion, the interview will include 15 minutes for the Proposer to lead a mock workshop exercise with the interview panel. More information will be available to interviewing Proposers.

If a proposal advances from the interviews and is selected by the District, the District will enter into negotiations with the selected Proposer. Should the District be unable to negotiate a satisfactory agreement with that Proposer, the District may formally terminate negotiations with that Proposer. The District may then undertake negotiations with another Proposer. The District reserves the right to award the Project to the Proposer the District deems most suitable to undertake the Project. The District further reserves the right to reject any or all proposals, or waive any irregularities in any of the proposals submitted pursuant to this RFP.

VII. General Information

Amendments: The District reserves the right to cancel or revise this RFP in part or in its entirety prior to the second round of the selection process. If the District cancels or revises the RFP, all known Proposers will be notified. The District also reserves the right to extend the date responses are due, or postpone the interview date.

Proposers Bear Costs: Proposing firms or teams shall bear all costs of the RFP and interviews, as occur. Selection for this effort will, in no way, preclude the selected Proposer from consideration, nor guarantee consideration of the Proposer, for any follow up projects.

Inquiries: Any questions concerning this RFP or selection process may be directed to Bill Heinicke, Director, Planning, Facilities & Planning Department. Telephone: (916) 686-7711 or e-mail: wheinick@egusd.net. Inquiries must be submitted by end of business, Tuesday, November 7, 2017. Following completion of the evaluation process, Proposers may request a debriefing from this office, within 10 calendar days of the Notice of Award, at the address above.



Proposers are admonished to not contact other District or Board personnel concerning this Request for Proposals on penalty of being disqualified.

Acknowledgment: Submission of a proposal pursuant to this RFP shall constitute acknowledgment and acceptance of all terms and conditions set forth in this RFP unless otherwise expressly stated in the proposal.

VIII. District Rights

1. Should the selected Proposer be awarded an Agreement through this RFP process the Proposer acknowledges that the District is determined to enter into such Agreement with the Proposer in reliance, in part, on the veracity of the representations made by the Proposer in its submittal. The District relies specifically on the Proposer's ability to provide the services with staff qualified as, and otherwise in the manner represented in the selected Proposer's submittal.
2. District may investigate the qualifications of any individual or firm under consideration, require confirmation of information furnished, and require additional evidence of qualifications to perform the services described in the proposal.
3. District also reserves certain rights, including but not limited to the following:
 - a. Reject any or all of the proposals.
 - b. Issue subsequent Requests for Qualifications or Proposals
 - c. Cancel the entire Request for Proposal.
 - d. Remedy technical errors in the Request for Proposal.
 - e. Appoint evaluation committees to review qualifications or proposals.
 - f. Seek the assistance of outside technical experts in qualification or proposal evaluation.
 - g. Approve or disapprove the use of particular subcontractors.
 - h. Establish a short list of firms eligible for discussions after review of the Request for Proposal.
 - i. Negotiate with any, all, or none of the responding Proposers.
 - j. Solicit best and final offers from all or some of the responding Proposers.
 - k. Enter into an Agreement.
 - l. Waive informalities and irregularities in Request for Proposal.
 - m. Award without discussion.

IX. Special Conditions

1. Non-Discrimination: The District does not discriminate on the basis of race, color, national origin, religion, age, ancestry, medical condition, disability, gender, gender orientation or gender identification.



2. Drug-Free Policy and Fingerprinting: The selected Proposer shall be required to complete any and all fingerprinting requirements and criminal background checks required by State law and shall also be required to complete a Drug-Free Workplace Certificate.
3. Public Records Act:
 - a. Responses to this RFP become the exclusive property of the District and are subject to the California Public Records Act. Those elements in each response which 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 in any way be liable or responsible for the disclosure of any such records including, without limitation, those so marked if disclosed is deemed to be required by law or by an order of the Court. Proposers, which indiscriminately identify all, or most of their submittal as exempt from disclosure without justification may be deemed non-responsive.
 - b. In the event the District is required to defend an action on a Public Records Act request for any of the contents of a proposal marked “Trade Secret”, “Confidential”, or “Proprietary”, all Proposers agree, upon submission of a proposal for 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.
4. Limitations: This RFP does not commit the District to award a contract, to defray any costs incurred in the preparation of a proposal pursuant to the RFP, or to procure or contract for work. The District reserves the right to waive any irregularities in the proposals received pursuant to this RFP, or in the process outlined herein for selection of a consultant for the Project.
5. Termination: In any contract entered into between the District and a selected Proposer, the District shall retain the right to terminate the contract for inadequate performance.