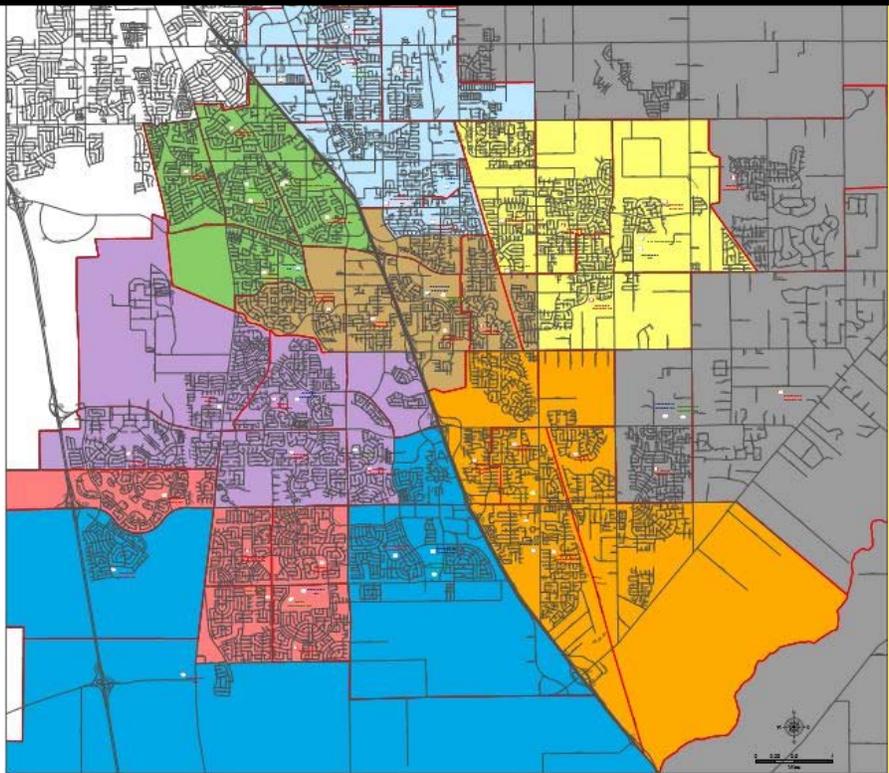




2016

Request for Qualifications



ARCHITECTURAL AND ENGINEERING DESIGN SERVICES

Facilities Master Plan and Related Projects

Elk Grove Unified School District
Facilities Planning Department
7510 Elk Grove-Florin Road Elk Grove, California 95624
(916) 686-7711

Issued: October 17, 2016
Due: November 14, 2016



TABLE OF CONTENTS

I. INTRODUCTION TO STATEMENTS OF QUALIFICATIONS (SOQ) SUBMITTAL PROCESS	1
A. Architectural/Engineering Services	
B. Description of Projects and Scope of Work	
C. Description of Architectural/Engineering Scope of Services	
D. Insurance Requirements	
E. District Rights and Responsibilities	
F. Special Conditions	
II. DISTRICT PROCESS FOR CONSULTANT SELECTION	7
A. Selection criteria	
III. CONTENTS OF STATEMENTS OF QUALIFICATIONS (SOQ) PROPOSALS AND EVALUATION CRITERIA	8
A. Introductory/Cover Letter	
B. Firm History	
C. Project Team/Staffing	
D. Firm Resources	
E. Consultants	
F. Financial Resources	
G. Relevant Experience	
H. Agency Experience	
I. Disputes	
J. Client Satisfaction/References	
V. EXHIBITS/ATTACHMENTS	
EXHIBIT 1: Relevant Experience	



I. INTRODUCTION TO SOQ SUBMITTAL PROCESS

The Elk Grove Unified School District (District) is seeking Statements of Qualifications (SOQ) from qualified Architectural and Engineering consulting firms to provide design and construction administration services related to implementation of EGUSD's Facilities Master Plan (FMP) and related projects.

All responsive Architectural/Engineering firms (Firms) must have an established working business address under their name for at least two years prior to the date of applying, located within a 100-mile radius of the District's offices.

The District will accept written questions and comments from prospective consultants for a period of five (5) business days commencing on **October 24 through October 28, 2016**, close of business. Addenda will be disseminated no later than **November 4, 2016**. Questions may be directed to Susan Bell, Chief Facilities Officer, Facilities & Planning Department. Telephone: (916) 686-7711 or E-Mail: subell@egusd.net.

Following completion of the evaluation process, Firms may request a debriefing within 10 calendar days of the results notification.

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

SOQs shall be 8-1/2" x 11", bound with tabs adhering to the Table of Contents format. **Submit five (5)** bound copies along with a searchable electronic copy in a sealed envelope and delivered or mailed to:

Susan Bell, Chief Facilities Officer
Elk Grove Unified School District
Facilities and Planning
9510 Elk Grove-Florin Road, Room 206
Elk Grove, CA 95624

**Applicants shall submit Statements of Qualification by 4:00 P.M., November 14, 2016.
Late submittals will not be considered.**

Request for Qualifications (RFQ) Schedule (Subject to change):

- | | |
|---|---------------------------------------|
| • Advertise RFQ: | October 17, 2016 |
| • Written Questions Accepted: | October 24 – October 28, 2016 |
| • Addenda (if any) issued no later than: | November 4, 2016 |
| • SOQs Due no later than: | November 14, 2016 at 4:00 P.M. |
| • Shortlist Notification: | November 30, 2016 |
| • Interviews (if required): | TBD |
| • Results Announced: | Mid December, 2016 |
| • EGUSD Board Approval of Pool selection: | January 2017 |

The District reserves the right to withdraw this RFQ at any time.

The District reserves the right, at its sole discretion, to modify RFQ requirements, cancel the selection process, amend the schedule, or select two pools of A/E firms.

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

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



A. ARCHITECTURAL AND/OR ENGINEERING SERVICES

Selected firms will be placed on a list to create a pool of consultants from which the District can assign school site improvement projects. This list will supersede any previously developed lists and/or project assignments. Projects will address needs identified in the Elk Grove Unified School District Facilities Master Plan (FMP) 2015-2025 Update and various other projects. Said projects may consist of additional and/or replacement facilities and modernization of existing facilities. The District will determine project assignment(s) and assign them to firms from the consultant pool. The District may also, as part of this SOQ process, select or “short list” firms for specific future projects.

Architectural/Engineering firms will provide all standard services associated with California public school construction and renovation projects. Firms selected will be the Architects and/or Engineers of Record for their designated project(s).

The Architectural/Engineering Firms or Teams must demonstrate capacity to simultaneously manage a minimum of two or more projects with a construction value of \$2 million or greater for each project.

B. DESCRIPTION OF PROJECTS AND SCOPE OF WORK

The District serves a vast community, serving the Cities of Elk Grove, Rancho Cordova, and Sacramento as well as the County of Sacramento, with a student population of approximately 62,000 in over 60 schools including 40 elementary schools, nine middle schools, nine high schools, three continuation schools, one independent study program, one charter school, and an adult career training center.

The District has a significant number of aging schools, the oldest of which was built in 1935; 15 are over 45 years old and 37 are over 20 years old. The average age of the District’s school buildings is 22 years old, an age in which school buildings require significant upgrades such as learning environment improvements or building systems major maintenance and/or replacement. In some cases, older buildings, especially portables may require replacement.

The District’s FMP identifies the current and future needs to improve, modernize, and maintain existing schools and the resources necessary to preserve and maintain the District’s capital assets and provide additional facilities to accommodate future projected enrollment growth. Specifically, the District has 520 portable classrooms, 385 of which are over 20 years old exceeding the life expectancy of these “temporary” buildings. The District’s existing school facilities require significant improvements and renovation as well as long term maintenance in order to provide 21st century learning environments to meet current and future standards. Concurrently, the District faces significant growth challenges -- there are nearly 90,000 new homes currently in planning stages, nearly 20,000 of which are projected to be built in the next 10 years. That growth will increase the District’s student population by not less than 14,000 students over the same period so a long term solution is needed to address these issues.

The types of projects identified in the FMP include, but are not limited to:

- Modernize, renovate, reconstruct, repair and/or upgrade classrooms, aging science labs, buildings, and equipment to provide 21st century learning environments in order to meet current and future standards and support academic and career pathways necessary to prepare students to compete in a global economy;
- Construction, expansion, replacement or repair, with respect to roofing, heating and air conditioning systems, storm and water drainage systems, security systems, plumbing,



REQUEST FOR QUALIFICATIONS

October 17, 2016

- insulation, electrical systems and wiring, safety and security, and lighting systems to ensure the health and safety of students;
- Improve student safety and security by constructing, expanding, replacing and/or repairing intrusion systems, lighting, fencing, gates, communications systems, cameras, surveillance systems, and classroom door locks;
 - Construct, reconstruct, repair, renovate and/or expand classrooms and existing facilities to accommodate new or expanded academies, including career technical education and college and career pathways;
 - Upgrade technology infrastructure and electrical service capacity and distribution, to relieve overloaded electrical systems and to improve instructional technology in the classroom for improved student learning, including new and maintained data and communications equipment and improvements; upgraded electrical capacity and technology infrastructure including fiber-optics and wireless internet access, improved telephone, data, video, and communications systems;
 - Create and equip quality classrooms, labs, libraries and community-use areas equally across District schools;
 - Reconstruct, repair, renovate, and/or expand deteriorating restrooms;
 - Upgrade fire alarm systems, including fire safety equipment and sprinklers to ensure student safety;
 - Make school site safety improvements to include repairing or replacing sidewalks, concrete and asphalt surfaces, including parking areas, service areas, and pick-up and drop-off areas, as well as core campus areas such as quads and hard courts;
 - Build, renovate and equip special education facilities to ensure that students' unique academic, social or physical needs can be met;
 - Upgrade accessibility to comply with the Americans with Disabilities Act;
 - Install energy efficient systems including but not limited to dual-pane windows, cool roofs, LED lighting, efficient heating and air conditioning systems, solar tube skylights and other natural daylighting systems, and potentially photovoltaic panels (in the event they are deemed economically viable in our utility service region) in order to reduce costs and protect the quality of instruction in core subjects like reading, math, science, and technology;
 - Make health and safety renovations to include the removal and/or mitigation of hazardous materials;
 - Modernize, renovate, reconstruct, repair or replace portable classrooms with permanent classrooms;
 - Improve access to schools by parents, visitors, and the community;
 - Make interior and exterior improvements including upgrades to infrastructure and major building systems; replace water, sewer, plumbing, irrigation systems; repaint facilities; renovate and improve athletic fields/facilities, playfields landscaped areas, and community-use areas;
 - Construct facilities that qualify for State funds, as a joint-use-project potentially with the City of Elk Grove, City of Rancho Cordova, City of Sacramento, County of Sacramento, Cosumnes Community Services District, Los Rios Community College District, California State University, University of California, or other eligible agencies or non-profit agencies for joint-use school facilities; and
 - The construction of new schools, classrooms and support sites to include new land acquisition, necessary furnishings, equipment, technology, and installation of site infrastructure, as needed to accommodate continued growth in student population and provide additional learning facilities for an anticipated minimum 14,000 additional students, including career technical educational facilities.

The District anticipates initial design work to commence in **2017** and completion of all funded projects within ten to twelve years.



C. DESCRIPTION OF ARCHITECTURAL / ENGINEERING SCOPE OF SERVICES

Project Assessment/ Preliminary Design Phase: Work may include but is not limited to the following:

- Meet with District Staff and Representatives, including but not limited to the assigned District Project Manager, Director of Planning, Planning Manager, Construction Manager and school site staff to review specific facility and program needs at a particular school;
- Meet with various District departments including but not limited to: Facilities, Maintenance & Grounds, IT/Phone/Data, Transportation, Health Services, Food services, etc.;
- Review Scope of Work requirements at each school. Prepare and document an assessment of existing accessibility, fire/life safety and modernization features. Thoroughly document existing conditions both in the facilities and on the site at a particular school;
- Arrive at an "Agreed-upon" prioritized Scope of Work and submit estimates for the cost of the corresponding construction effort;
- Submit the Project Assessment package in a report form that will include schematic level drawings, outline specifications and cost estimates representing all disciplines; and
- At the end of this stage, the District will set a Fixed Budget Limit (FBL) which will set the targeted construction costs accounting for any escalations as is standard in the business.

Schematic Design Development through Construction Documents Phase:

- Develop the Scope of Work for the District to initiate surveys and geotechnical work as required;
- Prepare design phase documents (SD, DD, 75%CD, CD) for submittal and review;
- Comply with the District's "Project Standard Guidelines" throughout the design process;
- The CD design package submitted to DSA shall be a fully coordinated and complete set of contract documents;
- Provide cost estimates at end of SD and 75% CD stages and participate in scope to budget reconciliation process; In the event the reconciled estimates vary by more than 7-1/2% of the FBL, Architect shall modify the documents at its own cost to meet the target;
- Participate in review of contract documents with the CM, School District, local Fire Marshal, DSA and representatives of other State or Local agencies as needed;
- Prepare color boards of all applicable materials for approval by District Representatives including the Bond Management Team and the site;
- Survey to determine the available swing space at each school with the Site Administrator, and develop a construction phasing plan in coordination with the CM;
- Where applicable develop an interim housing plan and obtain DSA approval for the plan;
- Incorporate Hazardous Material (Hazmat) mitigation documents provided by District's Industrial Hygiene consultant into the final document set to be approved by DSA;
- Prepare final set of plans and specifications for bidding; and
- Participate in the bidding process including but not limited to attending job walks, bid review and analysis, which may include preparing addenda and obtaining DSA approval of the same addenda;

Construction Phase: Work may include but is not limited to the following:

- Participate in construction administration, including review of submittals, attendance at weekly on-site meetings, preparation and implementation of DSA approved change orders, with drawings if applicable, respond to requests for information (RFIs), review of contractor payment requests, and attend construction meetings, as required;



- Perform the 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 DSA Close-out; and
- Submit to the District a "Record" set of documents. This will include incorporation of the Construction Contractor's marked up documents showing changes made through the course of construction and submitting the same in editable "AutoCAD dwg" and document (word and pdf) formats.

D. INSURANCE REQUIREMENTS

Prior to issuance of a "Notice to Proceed" on any District project, Firms will be required, to maintain, in full force and effect and at its own expense, insurance policies with companies certified with the California Insurance Commission. Prior to execution of a contract, firms will be required to provide the District with original "wet signature" certificate(s) of insurance that includes the following:

1. The Elk Grove Unified School District, its Board, Officers, employees and agents shall be named as additional insured parties on General Liability and Automobile policies. Endorsements must be submitted with the certificate(s); and
2. Should any of the above described policies be cancelled before the expiration date thereof, the issuing company will provide written notice to the certificate holder a minimum of 30 days prior to the said cancellation.

At a minimum, the following insurance policies will be required in order for your firm to contract with the District on projects:

- Worker's Compensation Insurance in compliance with California law;
- General Liability Insurance (\$2 million/per occurrence);
- Automobile Insurance (\$2 million/per occurrence); and
- Professional Liability Insurance (\$2 million per occurrence and \$2 million aggregate)

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.

E. DISTRICT RIGHTS AND RESPONSIBILITIES

1. District reserves the right to cancel or revise this RFQ in part or in its entirety. If the District cancels or revises the RFQ, all known responsive firms will be notified. The District also reserves the right to extend the date responses are due, or postpone the interview date(s).
2. Submission of a SOQ pursuant to this RFQ shall constitute acknowledgment and acceptance of all terms and conditions set forth in this RFQ unless otherwise expressly stated in the SOQ.
3. 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 SOQ.



REQUEST FOR QUALIFICATIONS

October 17, 2016

4. District also reserves certain rights, including but not limited to the following:
 - (a) Reject any or all of the SOQs;
 - (b) Issue subsequent Requests for Qualifications or SOQs;
 - (c) Cancel the entire Request for SOQ;
 - (d) Remedy technical errors in the Request for SOQ;
 - (e) Appoint evaluation committees to review qualifications or SOQs;
 - (f) Seek the assistance of outside technical experts in qualification or SOQ 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 SOQ;
 - (i) Negotiate with any, all, or none of the responding Firms;
 - (j) Solicit best and final offers from all or some of the responding Firms;
 - (k) Enter into an Agreement;
 - (l) Waive informalities and irregularities in Request for SOQ; and
 - (m) Award without discussion.

F. SPECIAL CONDITIONS

1. The provisions of Public Contract Code Sections 10115.15 et seq. as defined in the State Allocation Board Regulation 1862.12.5(g) for implementation of Disabled Veteran Business Enterprise (DVBE) Goals shall apply to projects in this program, and at a minimum, good faith efforts must be demonstrated.
2. 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.
3. Public Records Act:
 - (a) Responses to this RFQ 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. Firms, 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 SOQ marked "Trade Secret", "Confidential", or "Proprietary", all Firms agree, upon submission of a SOQ 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. This RFQ does not commit the District to award a contract, to defray any costs incurred in the preparation of a SOQ pursuant to the RFQ, or to procure or contract for work. The District reserves the right to waive any irregularities in the SOQs received pursuant to this RFQ, or in the process outlined herein for selection of a consultant for the Project.
5. In any contract entered into between the District and a selected Firm, the District shall retain the right to terminate the contract for inadequate performance.



II. DISTRICT PROCESS FOR CONSULTANT SELECTION

The District wishes to create a pool of Architectural/ Engineering consultants from which it can assign specific projects. EGUSD anticipates that some projects may require only an architect, an architect plus consulting engineers or solely consulting engineers depending upon the nature and complexity of the project and the level of review required. Accordingly, consulting engineers are invited to submit SOQ's independent of architecture firms.

All SOQs received by the specified deadline will be reviewed by the District for content, completeness, experience and qualifications. Those firms deemed the most qualified will be invited to interview for further evaluation by a committee. Specific information regarding the interview will be provided upon notification of the firms completing the preliminary screening process.

The District may also contact references and client lists provided by the firm selected to be reviewed by the committee.

The District reserves the right to select the Statement of Qualifications, which, in its sole judgment, best meets the needs of the District.

A. SELECTION CRITERIA

1. Responsiveness to Request for Statement of Qualifications – breadth and depth of response;
2. Professional reputation of firm;
3. Satisfaction of current/prior clients (References);
4. School design experience including recent processing of plans through DSA and availability to provide necessary documentation for OPSC submission;
5. Accuracy of firm's cost estimate history and ability to design within budget and implement cost saving procedures;
6. Proven experience related to project management responsibilities and ability to work as a team with contractors, construction managers and various district personnel; and
7. Ability to deliver effective architectural services working under successive deadlines and schedule constraints.

III. CONTENTS OF SOQS AND EVALUATION CRITERIA

Please provide the following information, in the order given below. SOQs will be carefully reviewed and assigned evaluation points based on the information you provide in the following categories:

A. INTRODUCTORY/COVER LETTER

Must include name of firm, address, telephone number, fax number, email address, home page URL, type of firm (i.e., corporation), California Registration Number and name of Principal to contact. Letter must be signed by representative of firm with authorization to bind firm by contract. (Maximum 2 pages.)



B. FIRM HISTORY

Provide a brief firm history including the following information:

- Number of years in business and date established. If name was changed, please provide previous firm name and an explanation of the name change;
- Indicate the number of years of experience the firm has in K-12 school design and construction in California;
- Location of office in which work will be performed;
- List of basic services provided by firm;
- List of additional services provided by firm under a standard agreement, i.e. printing and distribution of plans and specifications, assistance in selecting laboratories and inspector (if applicable);
- Total number of staff in the office identified above that are experienced in working with the *State School Facilities Program*;
- Describe the Project Team's professional qualifications and experience, including those of any sub-consultants, in order to clearly demonstrate your ability to successfully furnish the architectural/engineering design services required in this Request for Qualifications. Include only projects the firm has undertaken itself; work done by staff during their tenure elsewhere shall **not** be included; and
- Describe the firm's current organization and business structure (corporation, partnership, sole proprietorship, etc.). Include the following:
 1. Corporations:
 - (a) Date incorporated;
 - (b) Under the laws of what state;
 - (c) Provide all the following information for each person who is either (a) an officer of the corporation (president, vice president, secretary, treasurer), or (b) the owner of at least 10% of the corporation's stock: Name; Position; Years w/ Firm; % Ownership; and
 - (d) Identify every firm in related business trades that any person listed above has been associated with (as owner, general partner, limited partner or officer) at any time during the last five years: NOTE: For this question, "owner" and "partner" refer to ownership of 10% or more of the business, or 10% or more of its stock, if the business is a corporation: Name; Position; Years with Firm.
 2. Partnerships:
 - (a) Date of formation;
 - (b) Under the laws of what state;
 - (c) Provide all the following information for each partner who owns 10% or more of the firm: Name; Position; Years with Firm; % Ownership; and.
 - (d) Identify every outside firm in related business trades that any partner has been associated with (as owner, general partner, limited partner or officer) at any time during the last five years: Person's Name; Outside Firm; Dates of Participation with Firm.
 3. Sole Proprietorships:
 - (a) Date of commencement of business;
 - (b) Social security number of company owner; and
 - (c) Identify every firm in related business trades that the business owner has been associated with (as owner, general partner, limited partner or officer) at any time during the last five years: NOTE: For this question, "owner" and "partner" refer to ownership of 10% or more of the business, or 10% or more of its stock, if the



REQUEST FOR QUALIFICATIONS

October 17, 2016

business is a corporation: Person's Name; Outside Firm; Dates of Participation with Firm.

4. Joint Ventures:
 - (a) Name of each Firm in Joint Venture; % Ownership of Joint Venture;
 - (b) Information on each firm, as applicable, from above listing; and
 - (c) Date of commencement of joint venture.

C. PROJECT TEAM/STAFFING

Provide the number of licensed architects, architectural interns and the following key Team Members on your staff. Include their years with the firm, their discipline and registration numbers:

- Principal(s) in Charge
- Senior Staff Managers
- Project Architect
- Contract Administrator
- Any additional team members of interest that could be of service

Personnel at the time of contract signing, on each project, are expected to be involved throughout the life of the project.

Identify the names of the individuals who will comprise the core of your firm's Project Team. In addition, identify and include brief resumes for key members of your Project Team including proposed sub-consultants who would be participating in the projects. Include an organization chart depicting your approach to staffing and consultant management on two or more simultaneous projects.

- (a) Describe the role each of the proposed key personnel will perform if this SOQ is accepted;
- (b) List relevant experience for each of the proposed key personnel and describe their anticipated role, specific activities and responsibilities if this SOQ is accepted; and
- (c) Identify licenses and professional affiliations.

Please describe how work is organized in your firm to assure the District that individuals assigned to our projects(s) are not burdened with work on other projects.

D. FIRM RESOURCES

1. Design Capabilities/Design Philosophy:
 - (a) Provide an example of your firm's ability to design within the project budget and stay within allowable building costs by utilizing a cost effective design;
 - (b) Describe the unique strengths your firm can bring to the District's projects and how they set your firm apart from others;
 - (c) Provide an example that demonstrates your firm's ability to solve challenges concerning site or space utilization, both aesthetically and economically;
 - (d) Describe your firm's ability and experience with the coordination of educational specifications as required by the State Department of Education. Explain your firm's ability to communicate with and assist the District's design committee (composed of teachers, administrators, community members and maintenance personnel);



REQUEST FOR QUALIFICATIONS

October 17, 2016

- (e) Describe your firm approach to documenting existing conditions for modernization projects;
- (f) Outline your approach to and provide evidence of your firm's ability to maintain schedule during the design phases;
- (g) How is quality assurance and design document quality control handled?
- (h) Describe your Team's approach to designing projects to meet District issued Design Standards;
- (i) Describe your firm's experience with life-cycle costing methods for evaluating the cost and benefits of alternative energy systems over the life of the proposed project;
- (j) Describe your firm's ability to incorporate value engineering as a portion of the basic service. Does your firm outsource this component of design?
- (k) Explain your firm's experience with constructability reviews. Does your firm (and its staff) support this method of cost evaluating projects? Does your firm consider changing specific items to avoid cost overruns or change orders prior to bidding, an additional service?
- (l) In the event of re-use, what steps does your firm use to incorporate Change Orders (CO), Request for Qualifications (RFQ), Request for Information (RFI), Proposed Change Order (PCO) into a new project?

2. Technical & Construction Administration Capabilities:

(a) Cost Estimate History:

Please identify (from project's listed on Exhibit I, attached hereto) your firm's five most recently bid projects and show the relationship between the cost estimate and the actual bid amount.

(b) Change Order History:

- i. How does your firm handle the change order process? What methodology does your firm utilize to determine the validity and cost responsibility of a change request during construction?
- ii. What methodology does your firm use to determine whether or not the contractor's pricing of a change order is valid?
- iii. Describe your firm's process for keeping the District updated on change order types and totals throughout the project.
- iv. Please present an additional chart displaying the total changes on five of your firm's most recently completed school projects and indicate whether the change orders were requested by the district, architect, contractor, or unforeseen condition. What was the total percentage of all change orders at completion of project?

(c) Project Scheduling:

Describe an example of your firm's recent history in meeting a tight design schedule and timelines set forth by a K-12 school district project. Please identify any actions or creative design components that allowed a project to stay on schedule. How did your firm assist with the State approval process?

(d) Quality Control/Assurance Procedures:

Describe your firm's procedures for checking plans for coordination between plan layers (and various engineering disciplines), to assure coordinated drawings, prior to DSA plan review and bidding.



REQUEST FOR QUALIFICATIONS

October 17, 2016

(e) Experience with Federal, State and Local Agencies:

- i. Describe your firm's knowledge of the submission process at the Office of Public School Construction and your ability to adjust and interpret the necessary format of submission documentation requirements for a timely application submission;
- ii. Describe your firm's relationship with DSA and ability to reduce possible delays during the submission and back check stages; and
- iii. When is a school district required to receive CDE plan approval? Please briefly describe the process and what elements CDE staff is looking for.

(f) Experience with Utility Companies and other outside Agencies:

- i. How will your firm coordinate utility connections, both dry and wet, Public and Private; and
- ii. Describe your firm's relationship with fire departments, health departments, Local building and Transportation departments and your approach to obtaining their approvals.

(g) Cost Containment:

Describe how your firm would implement measures to manage and/or reduce construction costs.

(h) Construction Administration:

- i. What is the scope of project management services provided by your firm during construction?
- ii. Please explain how your firm plans to provide services to the District on a day-to-day basis and avoid delays that normally occur whenever there is a design conflict or unforeseen condition that needs to be addressed;
- iii. Describe your method of response to: a) District requested program design changes; b) a field clarification; and c) a change request; and
- iv. What is your firm's role upon the completion of construction? Please describe your experience managing punch list items to assist the District with immediate completion of the punch list items and the enforcement of the contractor's guarantee/warrantees.

E. CONSULTANTS

1. Identify the proposed consulting disciplines (i.e. structural, mechanical, electrical and civil engineers) associated with your firm and who would be participating in the projects. List the names, California registration numbers, business address; phone numbers, fax numbers, email address, and homepage URL, as well as the date established, and time associated with your firm.
2. Identify the number and type of each project completed in association with each consulting firm listed above within the last five years.

F. FINANCIAL RESOURCES

1. Provide credit references.
2. Provide a copy of the errors & omissions and professional liability insurance carried by your firm.



REQUEST FOR QUALIFICATIONS

October 17, 2016

3. Describe or provide your firm's fee philosophy for professional services. Is your firm willing to negotiate on your proposed fee structure? Is your firm willing to sign a contract based on a fixed fee?
4. Provide billing rates for the staff presented. Include: principal-in-charge and all proposed team members. (Billing rate schedule will not be used as a basis for selection.)

G. RELEVANT EXPERIENCE

1. Complete Exhibit 1 (attached). Provide the total number and dollar amount of K-12 school projects completed by your firm (LPP, SFP, bond and other programs) since 2005;
2. Please identify on Exhibit 1 the total number of projects under contract or completed by your firm that are applying for or were funded by SB 50 (the State School Facility Program).
3. Many of the upcoming District projects are on existing school campuses. Please provide photographic representations of projects listed in Exhibit 1 that you believe represent creative design elements or master planning expertise for these types of projects. Feel free to write a short explanation of the project and achieved solution.
4. Number of projects in progress by your office at this time. What percentage of these projects are K-12 school related?

H. AGENCY EXPERIENCE

1. Describe a project which presented challenging accessibility and how your firm solved those challenges; and
2. Explain your firm's interaction and experience with the agencies that have jurisdiction and/or review authority over K-12 projects.

I. DISPUTES

1. At any time in the last ten years has your firm been assessed and paid damages after completion of a project under contract with either a public or private owner? If yes, explain and identify all such projects by owner, owner's address, the date of completion of the project, amount of liquidated damages assessed and all other information necessary to fully explain the assessment of liquidated damages;
2. Has your firm had a contract or agreement for professional services terminated within the last ten years? If yes, explain the circumstances under which this occurred;
3. In the past ten years has any claim been filed in court or arbitration against your firm concerning your firm's work on a projects, if yes, identify the claim(s) by providing the project name, date of the claim, name of the claimant, a brief description of the nature of the claim, the court in which the case was filed and a brief description of the status of the claim (pending or, if resolved, a brief description of the resolution);
4. In the past ten years has your firm made a claim against a project owner concerning work on a project and filed that claim in court or arbitration? If yes, identify the claim by providing the project name, date of the claim, name of the entity (or entities) against whom the claim was filed, a brief description of the nature of the claim, the court in which the case was filed and a brief description of the status of the claim (pending, or if resolved, a brief description of the resolution); and
5. At any time during the past ten years has any surety firm or insurance company made any payments on your firm's behalf to satisfy any claims made against a professional performance issue on your firm's behalf on any project, either public or private? If yes, explain the amount of each such claim, the name and telephone number of the claimant, the date of the claim, the grounds for the claim, the present status of the claim, the date of resolution of such claim if resolved, the method by which such was resolved if resolved, the nature of the resolution and the amount, if any, at which the claim was resolved.



REQUEST FOR QUALIFICATIONS

October 17, 2016

6. Criminal Matters and Related Civil Suits:

- (a) 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 on a separate signed page, including identifying information of the name of the person(s) who were involved, the name of the public agency, the date of the investigation and the grounds for the finding;
- (b) Has your firm or any of its owners, officers, or partners ever been convicted of a crime involving any federal, state, or local laws related to construction? If yes, explain including identifying information of the name of the person(s) who were involved, the name of the public agency, the date of the conviction and the grounds for the conviction;
- (c) Has your firm or any of its owners, officers, or partners ever been convicted of a federal or state crime of fraud, theft, or any other act of dishonesty? If yes, identify the person or persons convicted, the court (the county if a state court, the district or location of the federal court), the year, and the criminal conduct; and
- (d) Will all project team members who will be on school sites be able to meet State of California fingerprinting requirements?

J. CLIENT SATISFACTION/REFERENCES

The District may contact previous clients in regard to the following answers. If your firm requests that we not contact the Client Reference, please explain the reason for your objection.

1. Has your firm ever been terminated during the course of any project? If so, explain.
2. Provide a reference list of not less than four education clients for whom your firm has provided similar design services for California K-12 projects during the past five (5) years. The projects should be valued at not less than \$2 million in construction costs. The District may or may not contact all of those listed on the reference list. References must include:

School district name, address.

Contact name, phone number.

Identify projects(s) for referral (list school principal name and phone number).

OPSC and DSA project numbers.

3. Does your firm attempt to meet the participation goal of at least 3% for Disabled Veteran Business Enterprises (DVBE)? If so, please explain.
4. Information regarding the Disabled Veteran Business Enterprises may be acquired on the internet address www.osmb.dgs.ca.gov/ or by calling (916) 323-5478.

MAXIMUM LENGTH OF SOQ SUBMITTAL: 75 pages

END OF REQUEST FOR QUALIFICATIONS

