

**REQUEST FOR QUALIFICATIONS
PROGRAM MANAGEMENT SERVICES
RFQ# PM 002**

San Rafael City Schools ("District") is seeking qualified persons, firms, partnerships, corporations, associations, or professional organizations to provide comprehensive professional program management services to the District for the Measure "A" and Measure "B" Bond Program ("Program") for new construction, expansion, modernization, and/or renovation projects ("Projects").

The Request for Qualifications ("RFQ"), which includes instructions for its completion, is enclosed for your consideration. According to the specifications contained herein, Respondents to this RFQ shall submit a completed Statement of Qualifications ("SOQ").

Respondents to this RFQ should mail or deliver five (5) bound copies, one (1) unbound copy, and one (1) electronic copy on CD or DVD of your SOQ to:

San Rafael City Schools
310 Nova Albion Way
San Rafael, CA 94903
Attn: [Chris Thomas, CBO]

ALL RESPONSES ARE DUE BY 2:00 P.M. ON Thursday May 5, 2016.

Oral, telegraphic, facsimile, telephone or email SOQs will not be accepted. SOQs received after aforementioned date and time will not be accepted and returned unopened.

An information meeting will be conducted on **Monday, April 18, 2016, at 10:00 A.M.** The meeting will occur at the District Office, second floor Meeting Room, 310 Nova Albion Way, San Rafael, CA. This meeting is not mandatory but highly recommended as general program information will be provided that is specific to this RFQ.

Questions regarding this RFQ may be directed to Chris Thomas at bondprojectinfo@srcs.org and must be submitted on or by **2:00 P.M. ON Tuesday, April 19, 2016.**

**San Rafael City Schools
REQUEST FOR QUALIFICATIONS
Program Management Services**

I. INTRODUCTION:

San Rafael City Schools ("District") includes the San Rafael Elementary School District and the San Rafael High School District, with a total student population of nearly 7,200. The Elementary District is composed of nine schools, and the High School District has two comprehensive 9-12 high schools and a continuation school. All District campuses are located in San Rafael, California.

The District is seeking responses to this Request for Qualifications ("RFQ") from experienced entities ("Program Manager") to provide comprehensive professional program management services to the District for the Measure "A" and Measure "B" Bond Program ("Program") for new construction, expansion, modernization, and/or renovation projects ("Project" or "Projects").

This RFQ defines the professional services sought from the Program Manager and generally outlines the Project requirements.

A. PROJECT DESCRIPTION AND BUDGET:

The purpose of this RFQ is to assemble a short list of qualified professionals to provide program management services for the Measures A and B Capital Facilities Programs. From that short list, the District intends to select one firm to provide program management services for both Measures A and B, which have a combined authorization of Two Hundred Sixty-Eight Million Two Hundred Twenty-Five Thousand Dollars (\$268,225,000)

The District is in the process of finalizing its program management budget for Measures A and B.

B. PERIOD OF PERFORMANCE:

The period of performance shall be not longer than the duration of the Programs. The District may, at its sole discretion, extend the term of any contract associated with this solicitation for five separate twelve-month option periods by providing written notice to the Program Manager firm not less than ninety (90) days before the contract expiration date. The total duration of any associated contract shall not exceed five (5) years.

C. ANTICIPATED CONTRACT:

Any contract(s) resulting from this RFQ will be a multi-year Time and Materials Contract for basic services, wherein labor rates may be negotiated for hourly labor charges and a monthly charge for those individuals who are anticipated to be fully dedicated to the specific District program. The contract will consist of a base year, extending one full year (365 calendar days; 366 calendar days if a leap year occurs) from the date of contract award, and four (4) additional one full year options to be exercised at the discretion of the District with the approval of the San Rafael City Schools Board of Trustees ("Board"), for a potential total contract duration of five (5) full years from the contract award date. A form of this professional services agreement ("Agreement") is distributed with this RFQ as **Appendix "A."**

D. FULL OPPORTUNITY:

The District hereby affirmatively ensures that Disadvantaged Business Enterprises ("DBE"), Small Local Business Enterprise ("SLBE"), Small Emerging Local Business Enterprise ("SELBE") and Disabled Veterans Business Enterprise ("DVBE") firms shall be afforded full opportunity to submit qualifications in response to this notice and will not be discriminated against on the basis of race, color, national origin, ancestry, disability, gender, transgender status, political affiliation, or religion in any consideration leading to the award of contract. No qualified disabled person shall, on the basis of disability, be excluded from participating in, be denied the benefits of, or otherwise be subjected to discrimination in any consideration leading to the award.

The District reserves the right to reject any or all SOQs, to waive any irregularities or informalities not affect by law, to evaluate the SOQs submitted and to award the contract according to the SOQ which best serves the interests of the District.

E. LIMITATIONS:

This RFQ is neither a formal request for bids, nor an offer by the District to contract with any party responding to this RFQ. 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 or proposal in response to this RFQ. The awarding of the program management services contract, if at all, is at the sole discretion of the District.

F. RESTRICTIONS ON LOBBYING AND CONTACTS:

From the period beginning on the date of the issuance of this RFQ and ending on the date of the award of the contract, no person, or entity submitting in response to this RFQ, nor any officer, employee, representative, agent, or consultant representing such a person or entity shall contact through any means or engage in any discussion regarding this RFQ, the evaluation or selection process/or the award of the contract with any member of the District, Board of Trustees, selection members, or any member of the Citizens' Oversight Committee, except as expressly authorized herein. Any such contact shall be grounds for the disqualification of the entity submitting a response.

II. SCOPE OF SERVICES:

A. GENERAL:

The District intends to select one firm that best meets the District's needs to perform the program management services as described in this RFQ. The District may assign all or parts of the work described below to the successful firm. The criteria on which the District makes its determination will not be limited to the amount of proposed fees, but will also be based on ability and experience as described herein. Each firm submitting a proposal must submit a budget for each scope of work as well as an overall cost if the firm is given all of the work.

In general, the selected Program Manager will work cooperatively with the District, Board, staff and consultants, project manager(s), architect(s) of record, project inspector(s), contractor(s), citizens' oversight committee, other District committees, and the community to facilitate the timely completion of the Program(s). The Program Manager will be the District's representative in relation to architects,

inspectors, and contractors and will monitor, manage and report compliance with plans and specifications for each contract.

B. SUMMARY OF RESPONSIBILITIES:

Program Projects will be selected from those identified in the District's Master Facilities Plan available online: www.srcs.org/mfp. The Program Manager shall be responsible for performing the scope of work indicated herein and in the Agreement attached hereto as **Appendix "A"** and generally shall perform the following categories of work as applicable to the selected Program and Projects, including, but not limited to:

- Report to and work under the direction of the Senior Director of Capital Facilities Program.
- Collaborate and work closely with Business Services and the Chief Business Officer, as directed by the Senior Director of CFP.
- Work with the District on overall scheduling, budgets, and communication for the Program; report to the District on Program status on a regular basis.
- Work with the District to develop scope, sequencing, scheduling, budgets, and communication for the Program. Develop and maintain reporting systems for each of those components.
- Report to the District on status of projects and other program components on a regular basis throughout the course of the bond Program. Prepare and present status reports to the District, the independent citizens' oversight committee, and Board, as applicable.
- Advise the District regarding Project delivery systems and bid timing and packaging strategies. Make recommendations to the District regarding ongoing updates or modifications to the Facilities Master Plan Bond Implementation Plan and Bond-funded Projects to account for changes in sequencing, delays, and cost issues.
- Assist in identifying, recruiting, selecting, and communicating with architects, construction managers, project inspectors, and other specialty consultants as needed. Advise on and coordinate work of subconsultants, such as soils and geotechnical consultants, environmental consultants, and other consultants not under the selected Architect(s). Participate in planning workshops. Attend meetings with site committees. Provide training to District staff, Board of Trustees, and others. Work with the District to encourage successful contractors to bid on other projects; identify/confirm problem contractors, and position the District to avoid using problem contractors on future projects.
- Advise the District on an ongoing basis regarding communication with state and other agencies involved in the construction process. Assist, as requested, with compliance with environmental and other regulatory requirements, as well as with applications for state funding. Assist the District in identifying

lines of authority, organization, and communication to effectively manage the Project under the Program.

- Assist the District with overall management, planning, coordination and administration of the Capital Facilities Program as it relates to the various projects, interfacing with District staff of various departments, the public, the Board, stakeholders, and representatives of outside organizations. Assist the District in evaluating and revising current procedures and developing new procedures as necessary.
- Utilize and maintain an overall cost and schedule reporting system, using District approved systems and software.
- Review the Program and Projects with the District to define and refine the Project scopes with District staff and architects. Sequence and schedule construction work for the Program and Projects with design architects, construction managers and District staff.
- Review current budget information and assist the District in refining its overall Project budgets within the Program budget, including expected construction costs, consultant costs, fees, permits, etc. Assist the District in preparing budgeting and reporting systems to reflect actual expenditures and to reallocate available funds as necessary. Assist the District in maintaining all necessary records for the annual Bond audit.
- Use standard accounting methods to tabulate, compile and check correctness of all expenditures associated with the Project based on information provided by the District. Develop simplified approval and billing procedures acceptable to the District.
- Recommend software for use in coordinating and maintaining schedules that document the sequence and time frame for the Project and/or bid package in the Project.
- Assist the District in the management, supervision, oversight, and evaluation of performance of separately hired construction management services firms, architectural/engineering firms, and specialty consultants.
- Assist the District with the development and implementation of an outreach program, with specific strategies to attract and increase participation of local, small, emerging and Disabled Veterans Business Enterprise ("DVBE") firms.
- Assist the District with the development and implementation of a process that provides cost control and timely, accurate measurement and reporting of expenditures. Prepare periodic summaries of Project expenditures for District review. Maintain current status of all obligations, commitments, and expenses against the Project under the Program. Maintain current status of revenue available for the Project from the Program.
- Assist the District in validating results of Project constructability reviews conducted by project managers.

- Submit necessary reports to federal, state and local authorities, including Division of State Architect (DSA) verified reports. Ensure that all other Project participants submit necessary documentation.

III. STATEMENT OF QUALIFICATIONS REQUIRED INFORMATION AND FORMAT

A. FORMAT:

Material must be in 8½ x 11 inch format. SOQs shall include divider tabs labeled with boldface headers below (e.g. the first tab would be entitled "Cover Letter," the second tab would be entitled "Table of Contents," etc.) Five (5) bound copies, one (1) unbound copy, and one (1) electronic copy of the SOQ shall be submitted. Each submittal shall not contain more than twenty (20) pages, excluding front and back covers and tabs. Submittals containing more than twenty (20) single sided pages will not be considered.

The unbound copy marked "Copy for Reproduction" shall be formatted as follows:

- No divider sheets or tab
- Text printed on one side only (i.e. no back to back pages)
- Pages with proprietary information removed
- A cover sheet listing the firm's name, the total number of pages, and identification of those pages that were removed due to proprietary information

B. CONTENTS:

The following criteria should define the individual or firm and should state why it believes it is qualified to provide the services requested in this RFQ. The outline below should be followed in the preparation of the SOQ:

1. Cover Letter – Maximum 2 pages (TAB 1)

- Provide a letter of introduction signed by an authorized officer of the Program Manager organization, which must include:
 - Name of firm
 - Name of Principal to contact
 - Telephone number, fax, e-mail, and website
 - Firm address
 - Summary of firm's qualities, capabilities, and proposal highlights
 - Signature of person authorized to bind the firm to the District's agreement, and name and contact information for main point of contact for the firm during the evaluation process.
- The cover letter must also include one of the following statements:

"The [firm's name] received a copy of the standardized Agreement For Program Management Services used by San Rafael City Schools, including the indemnity provisions and professional liability insurance provisions contained therein. If given the opportunity to contract with the District, the [firm's name] has no objections to the use of these

agreements." By virtue of submission [firm's name] declares that all information provided is true and correct."

or

"The [firm's name] received a copy of the standardized Agreement For Program Management Services used by San Rafael City Schools, including the indemnity provisions and professional liability insurance provisions contained therein. If given the opportunity to contract with the District, the [firm's name] has objections to the use of these agreements, listed as follows..." By virtue of submission [firm's name] declares that all information provided is true and correct."

- In the cover letter, Respondent shall also certify that no official or employee of the District, nor any business entity in which an official of the District has an interest, has been employed or retained to solicit or assist in the procuring of the resulting contract, nor and that any no such person will be employed in the performance of any contract without immediate divulgence of this fact to the District.

2. Table of Contents (TAB 2)

- Provide a Table of Contents delineating the contents of the submittal.

3. Firm Organization – Maximum 2 pages (TAB 3)

- Provide a brief history of your firm, and, if a joint venture, of each participating firm.
- Type of organization or company structure (i.e. legal form, ownership and senior officials of company).
- Certification that the firm is legally permitted or properly licensed to conduct business in the State of California and provide the services offered.
- Number of years the firm has been in business and type of business conducted. Identify proportion that program management is of overall business, and proportion that high school projects are of overall business.
- Location of the office that will be responsible for the implementation of this contract.
- How sub-consultants have been/will be utilized and what extent work has been/will be performed in-house.

4. Firm Qualifications (TAB 4)

- Firms submitting SOQs in response to this RFQ must be qualified to provide the program management services that are being submitted for. Each Program Manager must be capable of providing all necessary professional and technical services and resources to complete the responsibilities typically contracted for. Respondents must demonstrate

experience in working within community colleges, universities and/or school district systems. Identify each school program management engagement performed by your firm in the past five (5) years, or currently underway, including:

1. Name of project and school;
 2. Contact person and telephone number at school;
 3. Firm person in charge of program;
 4. Dollar value of program.
- Identify each high school project performed for which your firm provided program management services, including:
 1. Name of project and school;
 2. Contact person and telephone number at school;
 3. Firm person in charge of program;
 - Demonstrate its flexibility in adapting to the changing needs and priorities of a high school.
 - The Program Manager shall have at least 5 years of experience working with California Division of State Architect (DSA).

5. Complete Listing of Lawsuits or Litigation (TAB 5)

List all litigation arising from any college or school district project or program on which your firm provided program and/or project/construction management services in the in the past five (5) years. State the issues in the litigation, the status of the litigation, names of parties, and outcome. SOQs falling to provide the requested information on lawsuits or litigation, and responses which assert attorney-client privilege and fail to provide the information requested, will be considered non-responsive, disqualified from the selection process, and will not be evaluated.

6. Project Team Qualifications (TAB 6)

The selected firm shall employ, at its expense, professionals properly licensed and skilled in the execution of the functions required for program management as described herein. All services are to be performed under the direction and control of an architect, registered engineer, and/or contractor, each of whom is required to be licensed by the State of California.

- Identify the following key members within the firm who will be utilized on this project. Provide their resumes with qualifications especially as it relates to K12 school projects, including identifying those projects for the past five (5) years, and list license numbers and dates:
 - i. Principal-in-Charge
 - ii. Program Manager
 - iii. Project Engineer
 - iv. Cost Estimator
- Identify any proposed sub-consultants for this project. Include resumes and related experience for appropriate members of these firms. Firm must demonstrate long term relationships with any sub-consultants and submit recent project experience where the sub-consultant was utilized.

7. Resources, Proposed Methodologies, and Capabilities (TAB 7)

- Provide a statement demonstrating your firm's or team's ability to accomplish the scope of services in a comprehensive and thorough manner in order to meet the District's goal of moving projects into construction within the earliest possible timeframe, in compliance with all regulations. Specifically, describe the firm's technical capabilities for scheduling, budgeting, cost estimating, and document control. Provide recent examples of reports for each.
- Provide a statement of your work plan with your firm's current and projected workload, which should include available staff.
- Describe the firm's experience with state and other agencies involved in the planning, design, and construction process for high school or K12 projects. Describe the firm's quality control systems, including ability to monitor subconsultants, if any. Extensive experience with the Office of Public School Construction ("OPSC"), California Department of Education ("CDE"), DSA, Uniform Building Code ("UBC"), and Title 24 of the California Code of Regulations is mandatory. The Program Manager must have had prior experience with California Public Contract Code requirements applicable to competitively bid public contracts.

8. References (TAB 8)

- Provide a list of 3 references for similar work done in the last 7 years.
 - 1. Name of owner
 - 2. Contact name
 - 3. Contact's job title
 - 4. Phone number

5. Email address
6. Project name and location
7. Beginning and end dates of project (including construction)

9. FEE PROPOSAL (TAB 9)

- Provide hourly billing rates by position (proposed); staffing plan (proposed); and reimbursable schedule (proposed).
- Respondent shall prepare a table/chart for District fiscal years 2016-2017, through 2021-22 and an alternate for 2022-23, comprised of a staffing plan. Please indicate the level of effort (Full Time Equivalent) for each proposed project position and a reimbursable schedule that depicts only those expenditures that are exclusive to, and in support of, the Program as described in the proposed work plan.
- Respondent shall provide a Schedule of Rates (SOR) by position, by company entity, for each position proposed by your firm, whether you are submitting as a prime with subconsultant(s), or as joint venture or partnership. The SOR shall consist of a list of proposed project staff with proposed hourly billing rates and the level of effort of each identified position for the duration of the initial contract period. Billing rates (proposed) and staffing plan (proposed) will be subject to negotiation and justification as to substantiation of billing rates and staffing as to roles and responsibilities, time commitment (full-time/part-time), and timing of start dates and end dates.
- Included within the fee proposal should be the identification of proposed reimbursables by category (i.e. offices, computers and peripherals, printers, fax machines, photocopy equipment, other as identified by proposing entity). Travel and related expenses shall be reimbursed in accordance with the federal government Joint Travel Regulation. All reimbursables will require receipts to be provided to the District.

IV. SELECTION CRITERIA

A. EVALUATION

The District retains the sole discretion to determine whether a submittal is responsive, responsible and qualified and to waive any informalities or irregularities in the received SOQs. Further, the District reserves the right to reject any and all submittals and to negotiate contract terms with one or more responding firms for one or more of the work items. The District's review committee will utilize several evaluation criteria but will be primarily focused on the responding firm's information provided in response to the required SOQ information.

The SOQs will be evaluated based on each firm's qualifications and relevant experience with similar work to determine the best qualified to provide the required services at a fair and reasonable price to the District.

B. DISTRICT INVESTIGATIONS

The District may perform investigations of proposing parties that extend beyond contacting the references identified in the proposals.

C. SELECTION OF FINALISTS

Based on its evaluation of responses to this RFQ, the District's selection committee will select finalists for further evaluation. The criteria for selecting finalists may include, without limitation:

- The Firm's experience and performance history with similar programs;
- Experience and results of proposed personnel, and availability of resources to meet anticipated schedule and Program requirements;
- References from clients contacted by the District;
- Technical capabilities and track record of their use;
- Overall responsiveness of the proposal, clearly stating the understanding of the purpose, scope and objectives of the Program, and demonstrating a good practical approach and work plan to achieve these objectives.

D. INTERVIEWS

- Some of the finalists who elect to pursue the work with the District may be invited to meet with a District selection committee. If a firm is requested to come for an interview, the key proposed Project staff will be expected to attend the interview. The interview will be an opportunity for the District selection committee to review the proposal, the firm's history, and other matters the committee deems relevant to firm evaluation. The interview will start with an opportunity for the firm to present its proposal and its Project team.
- The finalists may be required to submit in advance of the interview a more detailed fee proposal. If requested, this fee proposal shall include all charges and costs proposed to be charged to the District, including rates for extra work.
- Any comments or objections to the form of Agreement attached hereto as **Appendix "A"** to this RFP/Q shall be provided in writing before the interview and may be the subject of inquiry at the interview. Any comments or objections to the form of Agreement not provided in writing before the interview will not be entertained by the District.
- Following the interviews, it is expected that the selection committee will make recommendations to District staff regarding the candidates and awarding the

contract. The criteria for these recommendations will include those identified above, as well as cost considerations.

E. Final Determination and Award

- The District reserves the right to contract with any entity responding to this RFQ for all or any portion of the work described herein and/or in an Agreement offered to the entity, to reject any proposal as non-responsive, and/or 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 proposals 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 proposal in response to this RFQ.
- The awarding of contract(s) is at the sole discretion of the District. The District expects to award contract(s) for the program management services identified in this RFQ in accordance with the schedule set forth in this RFQ.
- The District may, at its option, determine to award contracts only for portions of the scope of work. In such case, the successful proposing firm will be given the option not to agree to enter into the Agreement and the District will retain the right to negotiate with any other proposing firm selected as a finalist. If no finalist is willing to enter into a contract for the reduced scope of work, the District will retain the right to enter into negotiations with any other firm responding to this RFQ.

■ The proposer's qualifications package, and any other supporting materials submitted to the District in response to this RFQ will not be returned and will become the property of the District unless portions of the materials are designated as proprietary at the time of submittal, and are specifically requested to be returned. This RFQ does not commit the District to negotiate an agreement with any proposing firm or individual.

V. SUBMISSION GUIDELINES

Respondents to this RFQ should mail or deliver five (5) bound copies of their Statements of Qualifications to:

San Rafael City Schools
310 Nova Albion Way
San Rafael, CA 94903
Attn: Chris Thomas CBO

ALL RESPONSES ARE DUE BY 2:00 P.M., ON Thursday, May 5, 2016.

FAX OR EMAIL RESPONSES WILL NOT BE ACCEPTED.

Questions regarding this RFQ must be submitted in written form by mail or email to bondprojectinfo@srcs.org on or before Tuesday, April 19, 2:00pm, 2016.

Each Submittal must conform and be responsive to the requirements set forth in this RFQ.

The District reserves the right to waive any informalities or irregularities in received Submittals. Further, the District reserves the right to reject any and all Submittals and to negotiate contract terms with one or more respondent firms for one or more of the work items.

The District hereby notifies all respondents that it will affirmatively insure that, in any contract entered into pursuant to this advertisement, minority business enterprises will be afforded full opportunity to submit its response to this RFQ and no respondent will be discriminated against on the grounds of race, color, sex, age, ancestry, religion, marital status, national origin, medical condition or physical disability on consideration for the award.

The District reserves the right to change the dates on the schedule without prior notice.

RFQ RESPONSE SCHEDULE SUMMARY

Date	Item
Thursday, March 31, 2016	Release and advertisement of RFQ #PM002.
Thursday, March 31, 2016	Proposal packages available for distribution.
Tuesday, April 19, 2016 at 2:00 P.M.	Last day to receive written questions from Respondents. Submit written questions to Chris Thomas via mail or email at bondprojectinfo@srcs.org or SRCS, 310 Nova Albion Way, San Rafael, CA .
Friday, April 22, 2016	Last day to issue addenda to answer questions/clarifications.
Thursday, May 5, 2016 at 2:00 P.M.	Deadline for submissions in response to RFQ #PM 002.
Week of Thursday, May 12, 2016	Release of shortlist qualified firms and interview notifications.
Week of Tuesday, May 17, 2016	Interviews of qualified firms.
Thursday, May 19, 2016	Notice to selected firm.

WE THANK YOU FOR YOUR INTEREST IN THIS EXCITING PROGRAM!

APPENDIX "A"
FORM AGREEMENT