

Aromas San Juan Unified School District

**Request for Proposals Regarding
Facilities Master Planning Services**

**Contact: Michele Huntoon
Superintendent
2300 San Juan Hwy
San Juan Bautista, CA 95045**

RFP Deadline: October 31, 2019

Request for Proposals Regarding Facilities Master Planning Services

The Aromas San Juan Unified School District ("District") is soliciting proposals from experienced firms that can help with the planning, development and related work associated with a Facilities Master Plan ("Facilities Master Plan").

The purpose of this Request for Proposals ("RFP") is to obtain information that will enable the District to select a candidate that can effectively partner with the District to perform various components of a Facilities Master Plan. Each firm responding to this RFP should be prepared and equipped to provide complete and detailed Facilities Master Planning services on behalf of the District in an expeditious and timely manner and enable the District to meet critical time deadlines and schedules.

If your firm is interested in providing Facilities Master Planning services for or on behalf of the District, please submit a detailed summary of your firm's qualifications in accordance with this RFP. The deadline for receipt of Proposals is 2:00 PM, on October 31st, 2019 ("Response Deadline"). Note that proposals delivered after the Response Deadline may not be considered. A minimum of two (2) hard copies and one (1) electronic copy on a CD or flash drive in PDF format of your proposal should be submitted to:

Michele Huntoon
Superintendent
2300 San Juan Hwy
San Juan Bautista, CA 95045
mhuntoon@asjUSD.k12.ca.us

All submittals will become the property of the District. Information in the proposals will become public property and subject to disclosure laws. The District reserves the right to make use of any information or ideas in the proposals, reject any or all applicants, and to waive any irregularities or informalities in the RFP and RFP process. All costs associated with the preparation or submissions of qualifications, for this RFP are solely the responsibility of the candidates.

In order for the District to make an informed decision regarding selecting a firm among responsible and responsive candidates, your proposal must contain the following described elements or evidence that the candidate meets or exceeds the requirements stated hereto in this RFP.

1. SCOPE OF SERVICES

1.1 Meet with Facilities Master Planning Committee ("FMPC")

This task involves meeting with appropriate team members on the FMPC to obtain critical information on the existing facilities and conditions assessment. The FMPC shall meet throughout the Facilities Master Plan process. Participants in the FMPC might include members from the following groups:

- Parent Site Councils and School District Principals
- Representatives from School Foundations
- School District Staff
- Students
- Board of Trustees
- Superintendent's Cabinet

1.2 Community Outreach

In light of the significant community interest in the Facilities Master Plan process, this task involves selected firm assisting with Community Input Forums allowing the community to weigh in on the Facilities Master Plan process. Community Input Forums will be held to provide community members information and seek feedback from them on facility needs.

1.3 Develop Educational Specifications

Based on the District's Educational Program and input from the community and the staff, develop educational specifications detailing the facilities needs within the District.

1.4 Demographics and Enrollment Projections

Perform a study of housing markets within the District and enrollment projections for the current attendance areas for 3, 5, and 10 year periods. Review these findings and recommend school site sizes to accommodate the projections.

1.5 Capacity and Utilization Study and Determination of Eligibility for State Funding

Perform a school site capacity study, including a full facilities inventory, along with established State and local loading standards. Provide recommendations regarding maximum site sizes, possible school additions or new sites. Prepare Office of Public School Construction Eligibility Determination for growth and modernization programs including the State Full Day Kindergarten Grant Program, Facility and Financial hardship opportunities.

1.6 Facilities Equity Study

Analyze and compare teaching and support spaces between the school sites. These findings will be compared with the educational specifications to determine the need for changes or additions in facilities and spaces necessary to accommodate the instructional program.

1.7 Develop Future Facilities Needs and Alternatives

This task involves the firm assisting with prioritizing short-term and long-term needs of the School District, exploring community and joint use needs, preparing individual site Facilities Master Plans, providing recommendations for energy savings, incorporating deferred maintenance needs into each campus, facilitating and documenting FMPC input and assembling all material for the FMPC.

1.8 Cost Estimates

Identify and project all costs associated with the recommended facility additions and improvements.

1.9 Preparation of a Final Digital Facilities Master Plan

This task involves assisting with the preparation of a final digital Facilities Master Plan (in Adobe PDF format) that can be uploaded to the School District's website and can be easily accessed by the School District's constituents.

1.10 Facilitation of the FMPC Presentation

This task involves assisting with the facilitation of FMPC presentation/discussion of findings and recommendations to the Governing Board in a Board workshop setting.

1.11 Presentation to the Governing Board

After receiving feedback from the FMPC presentation described in 1.10, firm will assist with presentation of the draft Facilities Master Plan (including estimates, schedules, and possible funding scenarios) to the Governing Board for feedback prior to finalization and approval by the Board.

2. PROPOSAL FORMAT

Proposals should be typewritten, concise, straightforward, and must address each requirement and question. Submittals shall be signed by an authorized individual or officer of the firm submitting the statement. In addition, submittals are required to have the following:

- Materials must be in 8 ½ x 11 format.
- Table of Contents to include:
 - Cover Letter
 - Business Information
 - Project Approach
 - Relevant grade K-12 Experience
 - References
 - Project Team Summary (including sub-consultants)
 - Fees
 - Litigation History
 - Insurance

A firm's proposal shall at a minimum, include all of the following:

2.1. Cover Letter

A cover letter containing an introduction, including the name, address, telephone number, and e-mail address of the person or persons authorized to represent the institution regarding all matters related to the proposal. Cover letter should also include number of years in business and date firm was established. The letter shall be signed by the individual authorized to bind the respondent to all statements and representations made therein and to represent the authenticity of the information presented.

2.2. Business Information

Provide the following information for your firm and all sub-consultants:

- Company Name
- Address
- Telephone
- Fax
- Website URL (if applicable)
- Name and email of main contact
- Federal Tax I.D. Number
- License information including number and expiration date, if applicable
- Business Structure (Corporation, Partnership, etc.)
- A brief description and history of the firm
- Number of employees (licensed professionals, technical support, etc.)
- Number of current projects and present workload and where possible, projected workload for the period in question, for those individuals proposed to work the District's project
- Location of office where the bulk of services solicited will be performed
- Proof of Errors and Omission insurance and coverage amounts

2.3. Relevant Grade K-12 Project Experience

Provide information about prior services/designs prepared by your firm on at least three (3) or more prior Facilities Master Plans at the K-12 level. Include the following information:

- Briefly state the relevance for each project included for consideration in this RFP.
- Specify role of firm or individual if work was not exclusively completed by the firm (i.e. joint venture, etc.)
- Provide a list of the following for each project:
 - Project name and location
 - Beginning and end dates of project
 - Main program elements
 - School District and name of contact with contact information
 - Key individuals of the firm involved and their roles in the project
 - Any sub-consultants that worked with the firm.

2.4. References

Provide the following reference information for your firm:

- Provide five (5) K-12 references who you have worked with in the past five (5) years. Four of the references can be for existing clients. However, one of the references must be for a client you no longer do work for. Please provide a written explanation as to why you no longer have a relationship with that client.
- Provide two (2) Program Manager or Construction Manager References that include a reference for construction administration services.
- Provide authorization of the firm and all principals thereof to allow the District to make oral and/or written inquires of all references listed, regarding your qualifications, performance, reasonableness of fees and charges, and quality of

final results.

2.5. Project Team Summary

Identification of firm's project team and their specific expertise, experience, and resources to ensure suitable services. Indicate key team members, years with the firm, resumes, and California Registration Numbers, as applicable.

2.6. Fees

Provide your fee schedule. If you plan to propose charging any costs for additional services, describe the types of costs to be covered and a proposed fee schedule. Be sure to include overhead and other special charges.

2.7. Litigation History

Provide a comprehensive five-year summary of the firm's litigation, arbitration and negotiated/settled

2.8. Insurance

Provide proof of coverage for the types and amounts of insurance carried by the firm, including Commercial General Liability, automobile liability, Workers Compensation, and Professional Liability Coverage. Minimum limits of insurance required by the District for consultant and sub-consultants are as follows:

- Commercial General Liability Insurance (CGL) with a combined single limit of not less than \$1,000,000 each occurrence/\$1,000,000 in the annual aggregate.
- Business Automobile Liability Insurance with a combined single limit of not less than \$1,000,000 each accident.
- Professional Liability (Errors & Omissions) Insurance with a limit not less than \$1,000,000 each occurrence/\$2,000,000 in the annual aggregate.
- Workers' Compensation Insurance as required by the State of California.

3. CRITERIA FOR SELECTING PRE-QUALIFIED CONSULTANTS

Although not necessarily exhaustive of the criteria to be utilized by the District, the District intends to use the following evaluation criteria in selecting a firm to assist with the Facilities Master Plan. The evaluation criteria are as follows:

3.1. Timeliness and Completeness of Proposal

To receive maximum consideration, firm's proposal must be received by the Response Deadline. In addition, firm's proposal will be evaluated with respect to organization, clarity, completeness, and responsiveness to this RFP.

3.2. Technical Qualifications and Competence

This includes experience, expertise, and familiarity with applicable laws and requirements for school facility projects in general and Facilities Master Planning in particular.

3.3. Record of Past Performance

This includes work quality, completion of work on schedule, cost controls, contracts held with

other K-12 school districts over the last 5 years as well as the response of references provided by the firm or any other references identified by the District.

3.4. Approach to Work

This includes project management and coordination methodologies, prioritization analysis and study approaches and ability to work cohesively with various stakeholders involved in long-term planning efforts.

3.5. Fees

This includes total fee amount proposed by firm, any additional costs for sub-contractors required for completion of Facilities Master Plan and firm's policies respecting the pass-through to the District of overhead costs.

The District reserves the right to request that some or all of the respondents submit additional written information and/or that they consent to be interviewed by selected District personnel and/or representatives.

The District also reserves the right to: (i) extend the Response Deadline, (ii) send out additional RFPs, (iii) reject any and all submittals, and/or (iv) provide for mechanisms for firms to become pre-qualified to provide services for the District. The District is not obligated to explain any deficiencies in their proposal, nor accept requests for justification from firms not selected.

4. POLICIES APPLICABLE TO CONTRACT AWARDS

Acceptance by the District of any proposals submitted pursuant to this RFP shall not constitute any implied intent to enter into a contract for services outside the scope of this proposal. All work to be performed under any awarded contract must conform to the requirements of the District and, if applicable, the CDE and all other governmental agencies with jurisdiction.

5. QUESTIONS REGARDING RFP PROCESS

Please call or email C. John Dominguez at 916.257.2534 and john@schoolsitesolutions.com if you have any questions. All questions must be submitted one (1) week prior to the Response Deadline.

NOTE: Responders are cautioned to not contact members of the District's Board of Trustees or any District staff not listed in this document. Failure to observe this criteria will result in responder disqualification.

Interested firms should submit two (2) hard copies and one (1) electronic copy on a CD or flash drive in PDF format of the Response by October 31st, 2019 at 2:00 PM to:

Michele Huntoon
Superintendent
2300 San Juan Hwy
San Juan Bautista, CA 95045
Office: (831) 623-4500

The District thanks you for your interest in providing services to the District and invites your Response hereto in accordance with the terms of this RFP.

6. PRELIMINARY SCHEDULE

All dates are preliminary and subject to revision.

Date	Description
October 15, 2019 October 28, 2019 October 31 @ 2:00 P.M. November 4, 2019 November 13, 2019	Updated RFP is released Deadline for submission of questions Deadline for all submissions in response to the RFP Interviews Board meeting to select firm