

Pacific Grove Unified School District

435 Hillcrest Ave
Pacific Grove CA, 93950

Request for Qualifications and Proposals for
Professional Services associated with a
Districtwide Facility Needs Assessment

RFQP Issued:	April 5, 2024
RFI's Due:	April 19, 2024
Responses Due:	May 3, 2024 by 4pm
Planned Board Approval of Contract:	May 9, 2024 at 6:30 PM

**Request for Qualifications and Proposal (“RFQP”)
For Professional Services Services For The Measure D, General Obligation Bond Program
Facility Needs Assessment**

The Governing Board (the “Board”) of the Pacific Grove Unified School District (the “District”) is seeking statements of qualifications from qualified providers For Professional Services Services For The Measure D, General Obligation Bond Program Facility Needs Assessment

1. Critical Dates

Submittal Due Date:

An original + six (6) copies of the submittal shall be delivered **no later than 4pm on May 3, 2024. (PDT)** to:

Pacific Grove Unified School District
435 Hillcrest Ave
Pacific Grove, CA 93950
Attention: Joshua Jorn, Assistant Superintendent Business Services
josh.jorn@pgusd.org (emails and hard copies accepted)

Submittals not received by the deadline will be returned unopened.

2. Project Description

The District plans to construct numerous projects over the next 5 years, that coincide with the current Measure D List of Priorities as noted on the District Measure D webpage, and develop a long term Facilities Needs Assessment for future program and growth. Accordingly, the District may need to hire one or more firms to assist District staff with the Development of a Facilities Needs Assessment and a subsequent Facilities Master Plan that coincides with a future General Obligation Bond program extension.

3. Scope of Work

The Scope of Work may include overall a professional services agreement to include a districtwide facilities needs assessment to encompass all 6 District sites; ***Pacific Grove High School, Pacific Grove Community High School, Pacific Grove Adult School, Pacific Grove Middle School, Robert H. Down Elementary School and Forest Grove Elementary School***. The one or more firms to be hired will be expected to perform some or all of the scope of services described in the agreement accompanying this RFQP (*Attachment A*), which will be the general form of agreement that the firm must execute. Any statement of qualifications submitted in response to this RFQP (including the proposed hourly rate) must be based on the scope of services, fee structure (hourly rate with a not-to-exceed total amount), obligations, and other terms of this agreement. The District reserves the

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right to modify the scope, structure, and terms of the agreement to match the services that a particular firm is being hired to perform.

If a proposing firm would like to suggest any edits to the agreement form, they must be submitted ***at least two weeks ahead of the proposal deadline*** to allow the District time to consider the suggestion and, if a revision is made, issue an addendum to all proposing firms. No proposed edits will be considered after this deadline or after submittal of proposals.

For all services provided, the firm will assist District staff, act as an extension of District staff, and represent and protect the District's interests.

4. Statement Format and Content

The statement of qualifications should be clear, concise, complete, well organized, and demonstrate respondent's ability to follow instructions.

An original + six (6) copies of the statement must be provided, with no more than 30 single-sided pages in total length.

All respondents are requested to follow the order and format specified below. Please tab each section of the submittal to correspond to the numbers/headers shown below.

The cover shall include the RFQP's title and submittal due date, the name, address, fax number, and the telephone number of the responding firm (or firms if there is a joint venture or association). The cover should also identify the firm's proposed lead for the PGUSD Districtwide Facilities Needs Assessment.

The table of contents shall include complete and clear listings of headings and pages to allow easy reference to key information.

The following sections should be included in the statement in the order listed:

A. Cover Letter

A cover letter signed by an authorized officer of the firm submitting the statement, or signed by another person with authority to act on behalf of and bind the firm. Indicate contact person(s) for the PGUSD Districtwide Facilities Needs Assessment.

B. Mandatory Qualifications

Respondents must have the necessary qualifications to provide the requested services in accordance with California law, including but not limited to Government Code section 4529.5 and any required licenses. For any required licenses, please state the name of the license holder exactly as on file, the license number and date issued, the expiration date, and whether the license has been suspended or revoked in the past 5 years (if so, explain).

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Any individual or firm proposing to provide facilities needs assessment or facilities master plan professional services shall provide evidence that the individual or firm and its personnel carrying out onsite responsibilities have expertise and experience in providing these services.

C. Organization, Credentials, and General Background

Please provide a brief history of your organization, including:

1. Number of years the organization has been in business.
2. Location of office that will perform the work required by this RFQP.
3. List of basic services provided by your organization.

D. School Facilities Planning and Design Experience

Describe the experiences/background of your organization in providing facilities needs assessment and/or facilities master plan professional services for public school facilities required by this RFQP. Provide a list of similar projects performed over the last 5 years listing start and finish dates, project cost, contractor, owner, and owner contact information

E. Past Performance Record

If any of the following has occurred, please describe in detail the circumstances for each occurrence:

1. Failure to enter into a contract once selected/awarded.
2. Withdrawal of a proposal as a result of an error.
3. Termination or failure to complete a contract.
4. Debarment by any municipal, county, state, federal or local agency.
5. Involvement in litigation, arbitration or mediation.
6. Conviction of the firm or its principals for violating any federal or state law related to contract performance.
7. Knowing concealment of any deficiency in the performance of a prior contract.
8. Falsification of information or submission of deceptive or fraudulent statements in connection with a contract, including allegations of, or litigation relating to, violations of the California False Claims Act.
9. Willful disregard for applicable rules, laws or regulations.
10. Information regarding any of the above may be deemed to indicate an unsatisfactory record of performance.

F. Project Team

1. Identify key team members for the PGUSD Districtwide Facilities Needs Assessment and provide their qualifications.
2. Describe how the PGUSD Districtwide Facilities Needs Assessment would be staffed.

3. Identify all of your proposed consultants for the PGUSD Districtwide Facilities Needs Assessment and provide their qualifications.
4. Provide an organization chart for the PGUSD Districtwide Facilities Needs Assessment.
5. List the percentage of your firm's basic services on the PGUSD Districtwide Facilities Needs Assessment that will be performed by DVBE (if DVBE is required by Education Code §17076.11); and if that percentage is less than 3%, submit a verified description of your good faith efforts to include DVBE in your team. Use the District's forms (see Attachment C).
6. Include an executed Fingerprinting Notice and Acknowledgement form (see Attachment D).

G. Client Satisfaction/References

Provide a list of at least five educational client references for which your organization has performed facilities needs assessment and/or facilities master plan professional services similar to those required by this RFQP. References must include:

1. Name, address, telephone number, and a contact person of the project owner.
2. Name, address, telephone number and a contact person for the contractor(s) working on the project(s).
3. Describe the project(s) on which your organization provided services, including costs.

H. Insurance

Attach a letter from your insurance company indicating your firm's ability to provide insurance as required in the attached agreement (*Attachment A*), including but not limited to the following:

1. Commercial General Liability Insurance: Commercial general Liability Insurance shall be at least as broad as Insurance Services office General Liability Coverage (Occurrence Form CG 0001), with coverage limits of not less than per occurrence for bodily injury, personal injury and property damage and One Million Dollars (\$1,000,000) Dollars aggregate.
2. Automobile Liability Insurance: Automobile liability insurance shall be at least as broad as Insurance Services Office Form Number CA 0001 covering Automobile Liability, Code 1 (any auto), with coverage limits of at least One Million Dollars (\$1,000,000) for bodily injury and property damage each accident limit.
3. Workers' Compensation and Employer's Liability Insurance: The selected construction manager shall insure (or be a qualified self-insured) under the applicable laws relating to workers' compensation insurance all of their employees working on the PGUSD Districtwide Facilities Needs Assessment, in accordance with the "Workers Compensation and Insurance Act," Division IV of the California Labor Code. The selected construction manager shall provide employer's liability insurance in the

amount of at least One Million Dollars (\$1,000,000) per accident for bodily injury and disease.

4. Errors and Omissions Insurance: errors and omissions insurance on an occurrence or claims made basis with a limit of at least One Million Dollars (\$1,000,000).
5. All insurance will be in a form and with insurance companies acceptable to the District.
6. Insurance carriers shall be qualified to do business in California and maintain an agent for process within the State.

I. Current and Contracted Projects

Attach a list of your firm's projects currently underway and contracted for but not yet underway. List actual or expected start and completion dates of the projects, and explain how your firm will be able to effectively manage and perform the requested services for the District while also managing and performing the listed projects.

J. Proposed Fees

Attach a list of your firm's hourly rates for all personnel who may perform services on the PGUSD Districtwide Facilities Needs Assessment pursuant to the agreement.

Also, attach a matrix of estimated hours and hourly rates to be spent on the PGUSD Districtwide Facilities Needs Assessment per school site as noted in Section 3: Scope of Work, including a proposed not-to-exceed fee.

5. Selection Process

- A. The purpose of this RFQP is to enable the District to select a firm with whom the District may enter a version of the attached agreement for a Districtwide Facilities Needs Assessment for the proposed projects located at all (6) school sites. Selection shall be on the basis of demonstrated competence and on the professional qualifications necessary for the satisfactory performance of the services required, including performance at fair and reasonable prices. (See description of necessary qualifications, above.)
- B. The District will use the selection process outlined herein. A review and selection committee composed of key District officials and consultants will review and evaluate all submittals and may conduct interviews.
- C. Statements of qualifications will be opened privately to assure confidentiality and to avoid disclosure of the contents to competing respondents prior to and during the review and evaluation processes. However, to the extent that the submittals are public records under California law, they may be subject to release to members of the public if specifically requested under applicable law.
- D. The following items will be considered by the District in the review process:
 - Conformance to the specified format.

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- Organization, presentation, and content of the statement.
- Qualifications and experience.
- Hourly rates that will be charged by your organization for services rendered, and any not-to-exceed price that is proposed.
- Proposed methods and overall strategic plan to accomplish the work in a timely and competent manner within the District's financial constraints and time frames.

6. Interviews, Selection, and Requests for Proposals

The District may, but is not obligated to, conduct interviews with one or more of the firms that respond to this RFQP. If conducted, the interviews will be held on a date and time to be determined at the District Office. The firm's personnel that it proposes to perform the services must attend the interview.

The District reserves the right to send a further request for information to one or more of the firms that respond to this RFQP, including but not limited to a proposed not-to-exceed maximum total fee for the specified services based on the proposed personnel, their estimated total hours of work, and their hourly rates which were submitted in response to the RFQP.

After receipt of the proposals in response to the RFQP, the District may enter negotiations with one or more of the proposing entities regarding the contract price. Other than the amount of compensation, the terms of the agreement (*Attachment A*), including the compensation structure, are not negotiable, suggested edits to the agreement will not be considered after the deadline in Section 3 above, and submittal of a proposal shall be deemed acceptance of the agreement's terms. Should the District be unable to negotiate a satisfactory contract with one of the proposing entities, the District is under no obligation to enter an agreement with any of the entities. The District reserves the right to award contracts to one or more entities that the District deems most suitable to perform the services based on many factors, including demonstrated competence and qualifications for the types of services to be performed, and a fair and reasonable price. The District further reserves the right to reject any or all statements or proposals, or waive any irregularities in any of the statements and proposals submitted pursuant to this RFQP.

7. General Information

Amendments: The District reserves the right to cancel or revise this RFQP in part or in its entirety. If the District cancels or revises the RFQP, all respondents will be notified by addenda. The District also reserves the right to extend the date responses are due, or postpone the interview date.

Inquiries: Any questions concerning this RFQP or selection process may be directed to Joshua Jorn, Assistant Superintendent Business Services for the Pacific Grove Unified School District; 831-646-6509, or josh.jorn@pgusd.org (email preferred). Replies involving any substantive issues will be issued by addenda and mailed to all parties recorded by the District as having received the RFQP documents.

8. Special Conditions

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Non-Discrimination: The District does not discriminate on the basis of race, color, national origin, religion, age, ancestry, medical condition, disability, or gender in consideration for an award of contract.

Costs: Costs of preparing a statement in response to this RFQP are solely the responsibility of the respondent.

Limitations: This RFQP does not commit the District to award a contract, to defray any costs incurred in the preparation of a statement or proposal pursuant to the RFQP, or to procure or contract for work. The District reserves the right to waive any irregularities in the statements or proposals received pursuant to this RFQP, or in the process outlined herein for selection of a construction manager for these services.

Sanctions in Response to Russian Aggression: See the requirements for such sanctions in the Agreement attached to this RFQP.

ATTACHMENT A

Proposed Vendor Form of Agreement for Services

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ATTACHMENT B

SCOPE OF SERVICES

In addition to the scope of services described in the RFQP and the agreement (see Attachment A), the proposing firm must perform the following services:

- Facility Assessment on all 6 school site campuses
- Engineers/Professionals estimates to accompany scope of work identified
- Develop priority recommendations for project/scope implementation
- Ability to coordinate with Architect of Record, Engineer of Record and District on design concepts
- Interview and catalog wants, needs, and desires of District staff for projects (programming) beyond the immediate deferred maintenance and preventative maintenance needs of the District
- Assists PGUSD with updated list of priorities and 5-year deferred maintenance plan

ATTACHMENT C

DVBE CERTIFICATION AND DVBE WORKSHEET

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ATTACHMENT D

FINGERPRINTING NOTICE AND ACKNOWLEDGEMENT FORM

Fingerprinting is carried out by a third party entity and is at the cost of the vendor per employee. PGUSD can provide forms and guidance upon request. Vendors should plan on a \$30-50/employee cost for fingerprinting of any staff on District property.