

REQUEST FOR QUALIFICATIONS AND PROPOSAL (RFQ/RFP)
FOR
PROGRAM MANAGEMENT SERVICES
FOR THE
SWEETWATER UNION HIGH SCHOOL DISTRICT
PROPOSITION O AND OTHER FACILITY PROJECTS

February 26, 2007

I. GENERAL INFORMATION

The Sweetwater Union High School District (“District”) serves over 42,000 students (grades 7-12) and thousands of adult learners within its 150 square mile radius, making it one of the largest school districts in Southern California. In November 2006, District voters approved a \$644 million bond measure (“Proposition O”) for the purpose of repairing and renovating older schools.

In association with Proposition O, the District is also updating its Long-range Facility Master Plan (“Plan”). This Plan is expected to be updated and adopted in mid 2007. Elements of the Plan include a review of the Educational Facilities District Standards, a financing plan, and a prioritized list of projects that will be accomplished with Proposition O funds. These projects will be focused on 16 high schools, 14 middle schools, and 10 adult and vocational schools and will include upgrading classrooms and repairing and maintenance of building infrastructure to improve the District’s ability to deliver instructional programs. Other district facilities projects may be considered for program management support. Work associated with these projects is the primary subject of the Request for Qualifications/Request for Proposal. In mid 2007, it is anticipated that design work for a number of projects will commence in order to access approximately \$60 million in State funding and approximately \$150 million in local bond proceeds. Additional construction projects will be implemented in future years tied to bond sales.

Pursuant to California Government Code §53060, the District desires to engage a single entity to provide a range of program management services and provide an extension of and support to the District’s staff for the projects noted above and for other facilities projects (including but not limited to, remaining Proposition BB

funded projects and other State or privately funded projects). The selected firm will not perform any design, inspections, construction management services or construction work as a general contractor or subcontractor and shall not be allowed to self perform any trade work nor contract with affiliates to perform such work. The contracted scope of work shall be negotiated with the selected firm based on the services proposed by the firm and/or required by the District. The firm's in-house staff may provide the services, by joint venturing or by assembling a team of sub-consultants.

II. SCOPE OF WORK

Program Management Responsibilities

Reporting to the Director of Planning and Construction, the Program Manager will be responsible for a variety of program management duties including, but not limited to:

- a. Assist the District with overall management, coordination and administration of the Program, interfacing with District staff of various departments and representatives of outside organizations.
- b. Develop and maintain an overall cost and schedule reporting system and work with District staff to expand a Program operational and financial reporting system that can be used by all units to monitor Program status.
- c. As an integral part of the District, be prepared to implement a "mirror" organization that augments and works side-by-side with District staff.
- d. Review bond projects with each school to define and confirm projects and to refine the project scope with District staff and design architects.
- e. Sequence and schedule construction projects for each school with design architects, construction managers and District staff.
- f. Prepare and present status reports to the District, the independent citizens' Bond Oversight Committee and Board of Trustees, as applicable.
- g. Review current budget information and assist the District in refining its overall Program budget, including fees, permits, etc. Assist the District in revising budgets to reflect actual expenditures and to reallocate available funds as necessary. Assist the District in maintaining all necessary records for the annual bond audit.
- h. Use standard accounting methods to tabulate, compile and check correctness of all expenditures associated with the Program based on information provided by the District.
- i. Develop simplified approval and billing procedures acceptable to the District.
- j. Develop and provide training to District staff or other contractors on Program related functions and procedures.

- k. Working with District staff, encourage successful contractors to bid on other projects; identify/confirm problem contractors; and position district to avoid using problem contractors on future projects.
- l. Assist the District in identifying lines of authority, organization and communication to effectively manage the facilities program. Assist the District in evaluating and revising current procedures and developing new procedures as necessary.
- m. Recommend software for use in coordinating and maintaining schedules that document the sequence and time frame for each project and/or bid package in the Proposition O Program.
- n. Assist the District with the development of and implementation of a Business Outreach Program, with specific strategies to attract and increase participation of Local (“L”), Small (“S”), Emerging (“E”) and Disabled Veterans Business Enterprise (“DVBE”) firms.
- o. Assist District staff with the development of a process that provides cost control and timely, accurate measurement and reporting of expenditures. Prepare periodic summaries of Program expenditures for District review. Maintain current status of all obligations, commitments and expenses against the Proposition O Program. Maintain current status of revenue available for the Program.
- p. Assist the District in updating the Long-range Facilities Master Plan to reflect and include new construction, capital improvements and deferred maintenance for each facility, as requested by the District.
- q. Assist the District in identifying, recruiting, and selecting, architects, construction managers, and other specialty consultants.
- r. Assist the District in validating results of project constructability reviews conducted by project managers.
- s. Assist the District in the management, supervision, oversight, and evaluation of performance of the separately hired construction management services firms.
- t. Assist the District in the management, supervision, oversight, and evaluation of performance of the separately hired architectural/engineering firms.
- u. Assist the District in the management, supervision, oversight, and evaluation of performance of the separately hired specialty consultants.

III. DIRECTIONS TO INTERESTED FIRMS

Interested firms or respondents are requested to respond in accordance with the direction provided below. Page limit is fifty-five (55) pages, not including a separate sealed envelope containing the fee proposal.

- 1. COVER LETTER – Introduction of the team (prime, prime-sub-consultants, joint-venture) indicating the proposed structure of the respondent organization. Cover letter to be signed by an officer of the “prime”

consultant organization who, if selected, will have company oversight responsibility for delivery of services under the contract with the District. Page limit is one (1) page.

2. DESCRIPTION OF FIRM OR RESPONDENT ORGANIZATION – A written description of the firm’s or the respondent’s understanding of the District’s purpose, scope and objectives of the Program. Page limit is two (2) pages.
3. QUALIFICATIONS – A written statement of the firm’s or respondent’s qualifications to perform the scope of work described in Section II herein. Page limit is three (3) pages.
4. WRITTEN PROPOSAL AND WORK PLAN – A formal written proposal and work plan by firm or respondent to provide the scope of work described in Section II herein, and a detailed work plan describing the methodology, approach, techniques, schedules and other pertinent information that would enable the District to clearly understand how the proposing firm intends to mobilize and execute its roles and responsibilities in support of the District’s capital facilities program and projects. Page limit is twenty-five (25) pages.
5. FIRM INFORMATION – a brief history of the primary firm’s or respondent’s organization (which must differentiate respondent information as to whether it is prime versus subconsultant or partnership information if submitting for other than the primary firm) including the elements listed below. Page limit is five (5) pages.
 - a. Title page including firm name, address, phone, fax and point of contact.
 - b. Number of years in business.
 - c. List of basic services provided by firm (team partner and/or subcontract firms).
 - d. If company is a wholly owned subsidiary of a “parent company,” identify the “parent company.”
 - e. Total number of square feet of new school projects or school buildings and additions completed under the California School Facility Building Program by your firm in the last three years and the dollar value of those projects.
 - f. List all litigation history for any claims filed by your firm or against your firm related to the provision of program, project or construction management services in the last five (5) years.
 - g. References:
 - List services performed for California K-12 institutions and relevant local public agencies and when performed. Show names of agencies, as well as names and phone numbers of persons who can be contacted regarding the projects.
 - List similar services performed for a least five (5) additional organizations and when performed. Show names of organizations, as well as names and phone numbers of persons who can be contacted regarding the projects.
6. PROJECT TEAM INFORMATION – Page limit is twenty (20) pages.
 - a. Identify the firm’s key project team members that would be assigned to the project and when they would be in place. List their experience on projects of a similar type and scope (particularly management of large-scale programs involving middle and high schools).

- b. Identify the proposed project manager and other sub-consultants that would be relevant for the Program. Experience in school-related work shall be clearly identified for each individual. Include the following information for each of the sub-consultants:
 1. Identify Principal-In-Charge.
 2. Identify Project Director/Manager.
 3. List relevant licenses held, license numbers and dates, if applicable.
 4. Provide resumes of the above individuals and list their experience on related projects similar in type and scope.
 5. List business address, phone and fax numbers.
 - c. Provide an organizational chart showing the relationship of the District to firm and sub-consultants.
 - d. List the number of projects by type that the firm has worked on with the listed sub-consultant firms. Indicate if the assigned team members have previously worked together.
 - e. Describe firm controls to ensure adequate time is dedicated to the District's projects in conjunction with the firm's workload.
 - f. Identify the method the firm will use to ensure cost/budget controls during preparation of the plans and specifications.
 - g. Describe the firm's knowledge and staff experience with California funding programs for school construction.
 - h. Describe the firm's knowledge and experience with State Regulatory Agencies (State Allocation Board, Department of Education, Office of Public School Construction, and Division of the State Architect).
7. FEE PROPOSAL – Provide hourly billing rates by position (proposed); staffing plan (proposed); and reimbursable schedule (proposed). Please submit this separately in sealed envelope by separate cover letter. There is no page restriction.

The proposer or respondent shall prepare a table/chart for fiscal years July 1, 2007, through June 30, 2010, 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 District's Program as described in the proposed work plan.

The proposer or 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.

VI. INSURANCE

The insurance specific to the work performed under this contract shall include:

- a. Professional Liability – Two million dollars (\$2,000,000)
- b. Commercial General Liability and Property Insurance – Ten percent (10%) of the total project cost amount
- c. The District and its officers, agents, and employees must be listed as Additional Insured
- d. Worker’s Compensation Insurance – Statutory
- e. Employer’s Liability – One million dollars (\$1,000,000)

VII. SOFTWARE

The District’s construction manager is currently using Primavera P3. It is expected that the awarded firm will make use of these standard tools to enable the coordination of projects and tracking of information/costs.

Describe the software tools the firm uses and how they will interface with the District’s reporting systems.

VIII. HOUSING AND SUPPORT

The selected firm is expected to provide its own office housing. However, if appropriate, and at the District’s election, the District may house firm personnel with District staff for project efficiency or in one of the construction trailers at each site when construction commences. The District may provide a desk, chair, filing cabinet, and appropriate office supplies/copier use and fax machine use.

IX. EVALUATION OF PROPOSALS, INTERVIEWS, AND SELECTION PROCESS

The District will review all proposals for compliance with, and adherence to the format of this Request for Proposal. The District will evaluate and select up to three finalists from among all respondents, based upon, but not limited to, the following criteria (not ranked in priority order):

- a. 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.
- b. Technical expertise and viability of the firm, including experience of firm's principals and staff, and availability of resources to meet anticipated schedule and Program requirements.
- c. Technical Proposal – Comprehensiveness of the methodology proposed for supporting the Program.
- d. Management plans, including how the firm will manage team partners.
- e. Past performance of the proposing firm on relevant similar work previously accomplished for school districts.
- f. Ability to mobilize and have team in place in a timely manner to meet the District's needs in summer/fall 2007.
- g. Client references and their satisfaction regarding prior projects.

The “shortlisted” finalists will be required to attend an interview at which time each firm or respondent will present its proposal, project team, and qualifications and answer questions pertaining to its submittal. Key “on-site” staff proposed by the firm or respondent to be managing and working on the project will be expected to attend and participate in the interview.

Following the interview, the selection committee will identify and bring forward the ranking of the firms or respondents based on the phase one evaluation of qualifications and proposal and the phase two interview process. The selection committee will seek Board approval, in the form of a formal recommendation, for Superintendent or Designee to negotiate a contract with the top ranked firm, with concurrent approval to negotiate with the 2nd ranked firm or respondent should Superintendent or Designee fail in its effort to come to terms during the negotiation phase with the top ranked firm or respondent.

Following Board approval to negotiate a contract with the top ranked firm, the Superintendent or Designee will open the sealed envelope containing the “Fee Proposal” in accordance with the proposal section above. Superintendent or Designee will engage in negotiations with the top ranked firm and request authorization from the Board to contract with the top ranked firm for the initial contract period. Should the District fail to come to terms with the top ranked firm, negotiations will cease, and Superintendent or Designee will commence negotiations with the 2nd ranked firm.

The District reserves the right during the selection process to inspect the proposer's activities and financial statements to ensure the proposer's competence and ability to perform the specified services. The proposer's proposal may be rejected if the above inspection discloses information demonstrating that the proposer is not qualified or able to perform the specified services or has misrepresented its experiences, accomplishments or capabilities/qualifications.

X. AWARD OF CONTRACT

The District reserves the right to accept or reject any and all proposals, or any portion or combination thereof, to contract services with whomever and in whatever manner the District decides, to abandon the services entirely, to award on the basis of the qualifications and proposal and interview, and to waive any informality or non substantive irregularity, as the interests of the District may require in compliance with the Public Contract Code.

The proposer's qualifications package, and any other supporting materials submitted to the District in response to this Statement of Qualifications and Proposal 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 document does not commit the District to negotiate an agreement with any proposing firm or individual.

The District shall not be liable for any costs incurred in preparing and submitting responses to this RFQ/RFP and makes no representation that a contract will be awarded. Furthermore, the District reserves the right to add additional firms for consideration of receipt of this RFQ/RFP if such action is found to be in the best interest of the District.

The District reserves the right to award a contract any time up to ninety (90) days from the date of the proposal opening. The award of a contract is at the sole discretion of the District, acting through the Board of Trustees.

XI. TERM OF CONTRACT

This contract has a term of four years with four (4) two-year renewable options exercised at the District's sole discretion. Prices negotiated for the base year may be adjusted annually on occasion of the option renewal based on the Engineering News Record cost index (labor only) for the San Diego County area.

XII. SUBMISSION

Each firm is requested to submit five (5) copies of its Statement of Qualifications and Proposal on or before March 23, 2007, at 3:00 p.m. to:

Planning Department
1130 Fifth Avenue
Chula Vista, CA 91911
Attention: Ms. Katy Wright

Proposals and supporting documentation received subsequent to the hour and date specified above will not be considered.

Once the District receives the responses to the RFQ/RFP, they will remain valid and may not be withdrawn for a period of ninety (90) days.

XIII. PRE-PROPOSAL MEETING

A meeting will be held at 1:00 p.m. on March 6, 2007, at the District Board Room, 1130 Fifth Avenue, Chula Vista, CA 91911. This meeting will be held for the purpose of answering questions concerning the preparation of Proposal for the Proposition O Program. Because this meeting will be the only orientation for all interested firms, it is mandatory that interested firms attend.

XIV. QUESTIONS/CLARIFICATIONS

No proposer or respondent is to make any contact with any district official or member of the Board of Trustees. Any such contact will be cause for disqualification of the RFQ/RFP of the proposer or respondent. Questions or clarifications during the RFP and/or resume preparation period should be directed via email to Mr. Ramon Leyba at ramon.leyba@suhsd.k12.ca.us or Ms. Katy Wright at katy.wright@suhsd.k12.ca.us. Written responses shall be provided to all parties that attend the pre-proposal meeting.

XV. SUBMITTAL SCHEDULE (TENTATIVE)

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| • Distribution | February 26, 2007 |
| • Pre-Proposal Submittal Meeting | March 6, 2007 |
| • Submittal of Proposal – Deadline (3:00PM) | March 23, 2007 |
| • Review By Selection Committee/Short List | March 26-27, 2007 |
| • Oral Interviews/Firm Ranking | March 29, 2007 |
| • Recommendation to Board via Subcommittee | April 3, 2007 (Proposed) |
| • Special Board meeting for approval to negotiate contract | TBD |
| • Schedule And Conduct Fee Negotiations | April 10, 2007 (Proposed) |
| • Board Approval Of Contract (est. date) | April 16, 2007 |
| • Notice To Proceed (estimated date) | April 17, 2007 |