

Santa Rosa City Schools



Request For Proposals Regarding School Facility Funding Consulting Services

Contact: Erik Oden, Director, Maintenance & Operations

RFP Deadline: October 14, 2022 at 2:00 pm

Anna Trunnell
Superintendent

Santa Rosa City Schools
211 Ridgeway Ave.
Santa Rosa, CA 95401

Request For Proposals Regarding School Facility Funding Consulting Services

The Santa Rosa City Schools ("District") is soliciting proposals from qualified consultants that can help to identify, calculate the District's eligibility in, and assist the District in applying for, receiving, and auditing all available Local, State, and Federal funding for capital facility projects.

The purpose of this Request for Proposals ("RFP") is to obtain information that will enable the District to select an ideal candidate that can effectively partner with the District to perform the work outlined herein. Each consultant firm responding to this RFP should be prepared and equipped to provide complete and detailed school facility funding consulting services on behalf of the District in an expeditious and timely manner and enable the District to meet deadlines and schedules.

If your firm is interested in providing School Facility Funding Consulting 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 the proposal is October 14, 2022 at 2:00 pm ("Response Deadline"). Note that proposals delivered after the Response Deadline may not be considered. A minimum of three (3) hard copies and one (1) electronic copy on a flash drive in PDF format of your proposal should be submitted to:

Erik Oden
Director, Maintenance & Operations

All submittals will become 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 submission 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 Consultant firm among responsible and responsive candidates, your proposal must contain the following described elements or evidence that the Consultant candidate meets or exceeds the requirements stated hereto in this RFP.

1. REQUIRED SERVICES

The Consultant shall have the capability to perform the following services ("Required Services") for the District:

- A. Determination of District's State School Facility Program (SFP) New Construction Eligibility.
- B. Determination of District's State SFP Modernization Eligibility.
- C. Identification and Eligibility of All Other Capital Facility Funding Opportunities, including but not limited to all other SFP programs, AB 841, COVID relief funding, Department of Water Resources, Developer Fees, and other funding opportunities.
- D. Assist with the preparation of all State SFP funding applications.
- E. Assist with the preparation of California Department of Education (CDE) plan approval applications.
- F. Assistance with potential appeals to the State Allocation Board.
- G. Assist with the audit process and all expenditure reporting for State funding received under the SFP program.
- H. Assist with COVID-19 Related Funding Allocations and Expenditure Reporting.
- I. Assist the District in developing a Strategic Funding Plan to guide their capital facility planning efforts, including cash flow receipts.

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 experience
 - References
 - Project team summary (including sub-consultants)
 - Fees
 - Litigation history
 - Insurance

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

2.1 Cover Letter

A cover letter containing an introduction, 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 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.

2.4 Project Team Summary

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

2.5 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.

2.6 Litigation History

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

2.7 Insurance

- Commercial General Liability Insurance 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 Consultant to assist with the School Facility Funding Services. The evaluation criteria are as follows:

3.1. Timeliness and Completeness of Proposal

To receive maximum consideration, Consultant firm's proposal must be received by the Response Deadline. In addition, Consultant 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 and state funding opportunities and processes in general.

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 consultant 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 school facility planning and funding efforts.

3.5. Fees

This includes total fee amount proposed by Consultant firm and the Consultant 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 consultant firms to become Pre-Qualified to provide Consultant 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 Consultant firms services. 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 Erik Oden at 707-890-3800 x 80231 or eoden@srcs.k12.ca.us if you have any questions. All questions must be submitted by October 6, 2022 at 5:00 PM.

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

Interested firms should submit three (3) hard copies and one (1) electronic copy on a flash drive in PDF format of the response by October 14, 2022 at 2:00 pm to:

Erik Oden
Director, Maintenance & Operations
Santa Rosa City Schools
eoden@srcs.k12.ca.us

211 Ridgway Ave.
Santa Rosa, Ca, 95401
Attn: Erik Oden

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.

7. PRELIMINARY SCHEDULE

All dates are preliminary and subject to revision.

Date	Description
9/28/2022	RFP released
10/6/2022, 5:00 PM	Deadline for submission of questions
10/14/2022, 2:00 PM	Deadline for all submissions in response to the RFP
10/26/2022	Board meeting to approve Consultant Firm

