

SANTA ROSA CITY SCHOOLS

**REQUEST FOR PROPOSALS FOR PROFESSIONAL SERVICES FOR A
DISTRICT FACILITIES MASTER PLAN**

Santa Rosa City Schools (“District”) is inviting submittals from qualified firms (“Firms”) to provide professional services for the updating the District’s Facilities Master Plan (“FMP”).

It is the intention of the District to select a qualified Firm that can provide professional services to the District for the preparation of an FMP that will serve as a tool in guiding the District in facilities planning for the next ten (10) years. The plan will address the long range and the short-term goals and objectives of the Governing Board (“Board”) and reflect the needs of the school community, including staff and students. The FMP will facilitate the Board’s ranking of priorities and considerations in future facility investments and improvements.

It is the intention of the District to select a Firm and award a contract at the **February 22, 2023** Board meeting and then commence planning efforts immediately.

Five (5) hard copies of your complete proposal in response to this RFP and one (1) flash drive with an electronic copy of your proposal in PDF format must be received by the District by **3:00 PM on Monday, January 30, 2023** at the following address:

**Santa Rosa City Schools
Attn: Erik Oden, Director of Maintenance and Operations
211 Ridgway Ave
Santa Rosa, CA 95401**

Any proposals not received by such time may be disqualified at the sole discretion of the District.

Questions regarding this RFP may be directed to Erik Oden and Kelley Cook, in writing, by email at eoden@srcs.k12.ca.us and kcook@srcs.k12.ca.us . Questions must be received by the District no later than the date and time established in the Tentative Schedule provided herein. No other members of the District’s staff or Board should be contacted about this procurement during the procurement process. The District may, in its sole discretion, disqualify any proposer who engages in any prohibited communications.

The District reserves the right to cancel or revise, for any or no reason, in part or in its entirety, this RFP. If the District cancels or revises the RFP prior to the deadline for the submission of proposals, notification will be placed on the District’s website. The District makes no representation that any contract will be awarded to any proposer responding to this RFP. The District expressly reserves the right to postpone proposal

consideration for its own convenience, to waive any informality or irregularity in a proposal received, and to reject any and all proposals received in response to this RFP.

INTRODUCTION

As background, the District currently operates multiple school sites and programs, including preschool, elementary school, middle school, and high school programs, with a total of approximately 15,500 students. The District also currently operates administrative and maintenance facilities. The District is interested in modernizing and remodeling our sites, adding new TK classrooms, removal of dated or unused portables, and securing our campuses and district facilities. The District recently completed a master plan in 2016, but wishes to take a fresh look at its facilities and create a new master plan that reflects the current goals and priorities of the District.

SCOPE OF SERVICES

The District seeks a variety of professional master planning services, including:

- **Community Outreach.** Meeting and outreach facilitation associated with updating of the FMP. This includes meetings/forums with the community and staff to identify key issues related to school facilities and to weigh in on the FMP process. The Firm should be prepared to facilitate these meetings and collect and document the input from the participants. The Firm will also meet with District staff to review the requirements of the District's administrative and maintenance facilities. The Firm shall propose additional methods (e.g., interviews, surveys, and focus groups) to gather information and a schedule to obtain additional community input regarding school facilities.
- **Development of Educational Specifications/Facilities Needs Assessment.** Based on the District's educational program and input from the community and District staff, develop educational specifications detailing the facilities needs within the District, including analysis of existing facilities and their conditions to understand the needs in areas of growth, structural improvement, direction of curriculum, technology infrastructure, seismic safety, accessibility, modernization, and maintenance/repair costs.
- **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. Firm will review these findings and utilize this information to make recommendations to achieve school site sizes that will accommodate the enrollment projections.
- **Capacity and Utilization Study/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. Firm will provide recommendations regarding maximum site sizes, possible school additions, or new sites. Firm will also prepare an Office of Public School

Construction Eligibility Determination for new construction and modernization funding under the School Facility Program.

- **Facilities Equity Study.** Analyze and compare teaching and support spaces among the school sites. Firm will compare these findings with the educational specifications to determine the need for changes or additions in facilities and spaces necessary to accommodate the instructional program.
- **Development of Future Facilities Needs and Alternatives.** Prioritization of short-term and long range District needs, exploring community and joint use needs, preparing individual site FMPs to provide recommendations for incorporating deferred maintenance needs into each site, and providing recommendations for energy savings. Firm will include information on possible future sites that could be acquired and utilized to accommodate District growth. Firm will develop concrete strategies and implementation steps necessary to fulfill the needs identified by the FMP.
- **Cost Estimates.** Identify and project all costs associated with the recommended facility additions and improvements. This will include a cost benefit analysis for options including remodeling, changes in use, new construction, and new site acquisition.
- **Preparation of Final Digital Facilities Master Plan.** Prepare FMP in PDF format that can be uploaded to the District’s website and easily accessed by the public.
- **Facilitation of FMP Presentations to District Governing Board.** This includes facilitation of presentations/discussions of the findings, recommendations, estimates, schedules, possible funding scenarios, etc. to the Board.

TENTATIVE SCHEDULE

The District anticipates the process for evaluating, selecting a proposer, and awarding the contract will be according to the following tentative schedule:

- | | | |
|----|--|--------------------------|
| A. | Issue RFP | December 7, 2022 |
| C. | Last Day to Submit Questions Regarding RFP | January 24, 2023 |
| D. | Proposal Due Date | January 30, 2023 |
| E. | Interviews (if any) | Week of February 6, 2023 |
| G. | Board Meeting to Select Firm/Approve Agreement | February 22, 2023 |

All dates are tentative and subject to revision.

INSTRUCTIONS TO PROPOSERS

The District is inviting proposals from qualified Firms to provide professional services for the updating of the District's FMP.

A. GENERAL

1. Responsibilities of Firm

The responsibilities and duties listed in this RFP are stated in general terms and are for informational purposes only. The parties shall negotiate a services agreement after a recommended Firm has been selected. **Any contract negotiated shall be subject to Board approval.**

The Firm selected is expected to have the qualifications and experience to complete an FMP update on behalf of the District. The completed FMP shall comprehensively examine the District's long-term facilities needs, evaluate the District's demographics and trends to understand potential future enrollment, and identify priority projects for potential construction over the next 10 years.

The District expects the FMP to be completed by November 30, 2023.

2. Questions and Inquiries

Any questions regarding this RFP or the FMP shall be directed, in writing, to the District representative specified below. Transmission of questions may be made in writing by e-mail only, and must be received by the District no later than the date and time established above in the Tentative Schedule. All requests for modification, interpretation, or clarification must be accompanied by all relevant information supporting the request. The District will evaluate any question or request submitted, but reserves the right at its sole discretion to determine whether to respond or accept the requested change.

Proposers are strongly cautioned to refrain from contacting any other member of the District staff, administration or any member of the District's Board prior to the final selection of a Firm for the project. Any prohibited communications may result in immediate disqualification of a Firm's response to this RFP.

District Representative:

Name: Erik Oden, Director, Maintenance and Operations

Telephone: (707) 890-3800 x 80231

Email: eoden@srcs.k12.ca.us

3. Proposal Validity Period

The proposer agrees that its proposal will remain valid for 180 calendar days ("Validity Period") following the Proposal Due Date. The District may request an extension of the Validity Period. The Validity Period shall be automatically extended during the pendency

of a protest or any legal action challenging the validity of the procurement. Once an award is made to a proposer, all elements of that proposer's proposal shall remain valid until the completion of the project where an agreement is executed.

4. Public Records

All proposals and documents submitted in response to this RFP become the property of the District and responses to this RFP are subject to the provisions of the California Public Records Act (Government Code sections 6250 et seq.).

B. INSTRUCTIONS FOR SUBMITTING RESPONSE

Each Firm responding to the RFP shall address the following items in its response. Each item below shall be separated and clearly marked by tabs, or other means, to allow for easy review by the District. The RFP response shall not exceed twenty-five (25) pages, excluding front and back covers, tabs, and table of contents.

1. Cover Letter

A maximum one-page, dated introductory letter must be submitted including the legal name of the proposer, address, telephone and fax numbers, RFP number and the name, title, and signature of the person(s) authorized to submit the qualifications on behalf of the Firm.

2. Table of Contents

A table of contents of the material contained in the proposal should follow the cover letter.

3. Executive Summary

The executive summary should contain an outline of the Firm's business approach, a synopsis of the Firm's experience working with school districts on FMPs, along with a brief summary of the Firm's qualifications to engage in a professional relationship with the District.

4. Description of Firm

Provide specific information regarding the size, financial strength, location, nature of work performed, number of employees, years in business, California business license number (if applicable), and tax identification number of Firm. Please identify the principal-in-charge who will serve as the District's main contact throughout the project. Include the address, telephone, and fax number of the office that will be primarily responsible for providing services under the proposal.

Please also provide evidence that the Firm is in good standing and able to complete business in the State of California.

5. Background of Firm's Personnel

Identify and provide the background, including resumes, of employees whom the Firm expects will be utilized on the project and will make up the project team. The team proposed must remain intact during the procurement process and the life of the project, if the proposer is selected, unless otherwise agreed in writing by District. By submitting a proposal, proposer acknowledges that the District is making a selection based on the experience and qualifications of the team presented in the proposal and any changes to the team without the consent of the District may constitute a breach of contract by the proposer.

6. Experience in Development of Facilities Master Plans

Provide a detailed summary of the Firm's experience working with other California public school districts to provide professional services for the development of FMPs. Provide specific examples of projects of similar scope and character as the proposed work described in this RFP. Demonstrate knowledge, experience, and success in:

- Assessment of existing and future facilities needs;
- Understanding of school district demographics and analysis and projection of student enrollment numbers;
- Prioritizing projects based on district needs and providing cost benefit analysis concerning potential future construction or modernization of district facilities;
- Exploring alternative funding and financing options for improvement of district facilities, including analysis of potentially seeking passage of a bond;
- Integration of technology into existing facilities to improve student educational opportunities;
- Considering the integration of sustainable building systems into facility improvement, particularly towards reducing energy and water use; and
- Outreach to district constituents, including staff, students and parents concerning viewpoints on district facilities needs and compilation of such outreach for easy analysis by the district's governing board and administration.

7. Litigation History

The Firm shall list all services-related litigation and/or claims in the last five (5) years, filed either by a client, a client's representative, or a contractor, which names the Firm, Firm's employees, or Firm's consultants as defendants of any type or seeks compensation arising out of Firm's provision of planning or architectural services. State the nature of the complaint or claim, the beginning and end date, or anticipated end date, of each lawsuit, case number of proceeding, and the judgment or resolution or the anticipated judgment or resolution, including any settlement outside of court.

The Firm shall also provide specific information on termination for default and information concerning any convictions for filing false claims within the past five (5) years.

The Firm shall state whether the Firm has or has not filed a petition for bankruptcy. If the Firm has filed a petition for bankruptcy, the Firm shall provide the date the petition was filed and identify the jurisdiction in which the petition was filed.

8. Complaints Lodged with Local, State, or Professional Agencies

The Firm shall disclose complaint(s), if any, that have been lodged against the Firm with any local public agency, any agency of the State of California, or any professional organization with which the Firm is affiliated and, if so, describe the nature of the complaint(s) and outcome(s) or anticipated outcome(s).

9. Insurance

The Firm shall describe the outcome of claims, if any, filed against Firm's general liability, professional liability, or automobile liability insurance carriers during the past five (5) years. Identify the Firm's insurance carriers' name and address and policy number(s) for general liability and professional liability for the past five (5) years.

10. References

The Firm shall list a minimum of five (5) references for whom Firm has provided FMP services in California for state and/or federally funded public schools. As part of the evaluation process, the District will diligently follow up on references to confirm experience and qualifications of proposers. Please include the following information for each reference provided on separate pages:

- 1) Year(s) of services
- 2) School district
- 3) Current contact person
- 4) Title/position
- 5) Contact phone number
- 6) Project description
- 7) Dollar value of the project

11. Experience with State Regulatory Agencies

Specify the Firm's experience working with State agencies, including the Office of Public School Construction, State Allocation Board, California Department of Education, and Division of the State Architect.

12. Project Plan and Methodology

Describe the procedures that the Firm will employ to ensure that the needs of the District will be satisfied, including completion of the project in a cost-effective and timely manner. Please describe how the Firm will manage and control costs, while providing the highest quality of design and planning services. Include an estimate of the amount of District staff time needed for assistance.

13. Current Projects and Workload

Please describe current projects that the Firm is engaged in of similar size and scope. Please describe how current workload demands on the Firm may impact the preparation of the FMP for the District on schedule and to the satisfaction of the District.

14. Joint Ventures and Associations

If the project is to be undertaken by the Firm in joint venture or in association with one or more other entities, identify the parties involved in such a joint effort, the roles and responsibilities of each party, and whether all parties will be jointly and severally liable for performance and all contractual liabilities. In the event of a joint venture, please provide a copy of the joint venture agreement and identify which firm will be the lead member of the venture. The District reserves the right to require the lead firm to sign a Guaranty concerning the work to be completed.

15. Fee Estimate Range and Terms

Please provide rates and fees for all proposed members of the Firm's team who will provide services in response to this RFP. Please provide an estimate for the number of hours that the proposed work will take in the judgment of the Firm. Please include rates for all expected fees associated with the work (e.g., travel expenses, copying and printing costs, etc.).

The District seeks to negotiate a fixed, not-to-exceed fee based on the final negotiated scope of work with any "additional work" being subject to reimbursement based on agreed upon rates for each member of the FMP team. However, the District will consider a cost reimbursement contract should such an approach be determined to be in the best interests of the District when selecting the Firm to perform the work.

16. Other

Each Firm is encouraged to provide a description of resources or any other information the Firm believes is pertinent to its proposal. Please do not include brochures or other marketing-related materials.

C. DISTRICT'S EVALUATION PROCESS

Upon the District's receipt of the proposals, each proposal will be reviewed for (a) minor informalities, irregularities, and apparent clerical mistakes which are unrelated to the

substantive content of the proposal; (b) conformance to the RFP instructions regarding organization and format; and (c) responsiveness of the proposer to the requirements set forth in this RFP. Those proposals determined to not be responsive to the requirements of this RFP may be excluded from further consideration and the proposer will be so advised. The District may also exclude from consideration any proposer whose RFP contains a material misrepresentation. The District reserves the right to reject any or all proposals, to waive minor technicalities, or to advertise for new proposals if, in the judgment of the District, such course of action is in the best interests of the District.

The District will establish an Evaluation Committee for the purpose of reviewing and evaluating proposals submitted in response to the RFP. Selection of candidate(s) will be based on demonstrated competence and on the professional qualifications necessary to meet the District's needs to perform the services described in this RFP.

After an initial screening of Firms, the District may conduct in-person interviews with three or more Firms. Interviews will consist of a proposer's presentation to the Evaluation Committee and a question and answer discussion session with possible role playing in response to a given scenario. The presentation will afford the proposers the opportunity to highlight the significant aspects of their approach and understanding of the project and offer a chance for the Evaluation Committee to ask clarifying questions of their proposals. The oral presentation shall not be used to fill in missing or incomplete information that was required in the written proposal. No new information shall be presented by any proposer at the interview. An interview invitation letter will provide items for discussion during the interview presentation. Specific topics shall be provided in the interview letter. Date, time, location, required personnel, allotted time for the interviews, as well as equipment available to proposer for the presentation, shall also be provided in the interview letter. **The key project personnel listed by the proposer in its proposal should participate in the interview.**

The District reserves the right to contract with one or more Firms. The District makes no representation that any participation in the RFP process will lead to an award of a contract or any agreement whatsoever.

The District may perform an investigation of the Firms that extends beyond contacting the school districts or other entities identified in the proposals. The District shall have the right to request any additional information from any or all of the proposing Firms, to select, in its sole discretion, Firms that will be interviewed, and to select, in its sole discretion, the Firm that best meets the needs of the District and to initiate negotiations to engage that Firm. In the event that such negotiations are determined, in the District's sole discretion, to be unsuccessful, the District shall have the right to terminate such negotiations and enter negotiations with the next most preferred Firm.

Each responsive proposal will be evaluated according to the criteria set forth below:

PROPOSAL EVALUATION CRITERIA

Category

- Firm Experience and Qualifications

- Litigation/Claims/Complaint History
- Project Plan and Methodology
- Fees
- References
- Compliance with RFP

The District will make its selection based on its impressions of which firm will be the best fit based on these categories. These categories will not be formally scored.

The following are conditions precedent to final award of the contract(s): (a) successful completion of negotiations (if held); (b) receipt by District of all of the documents required to be provided prior to execution of the agreement; and (c) any other conditions required by the District's Board. Final award will be evidenced by execution of the agreement by the District's designee following approval by the District's Board. In the event only one proposal is received in response to this RFP, District reserves the right to move forward with award to that proposer if determined to be in the best interests of the District.

D. MISCELLANEOUS

The individual or official of Firm who has the authority to contractually bind Firm must sign the RFP response.

The RFP response preparation and associated costs are the sole responsibility of the proposer and no proposer will be reimbursed by the District for any costs associated with responding to this RFP.

Submission of proposals by facsimile or email is not acceptable. Firm is entirely responsible for the means of delivering the proposal to the appropriate office on time.

Each proposer shall be solely responsible for examining this RFP and all its parts with appropriate care and diligence. Each proposer is also responsible for monitoring the information concerning this RFP and the procurement.

Throughout this procurement and any subsequent contract executed, all proposers are required to comply with all applicable state, federal, and local laws and regulations including, but not limited to, the California Labor Code. Proposers shall be responsible for complying with all applicable prevailing wage requirements and any applicable reporting and registration requirements as required by the California Department of Industrial Relations.

Each proposer agrees that the District shall be entitled to use all work product that is not returned to the proposer (including concepts, ideas, technology, techniques, methods,

processes, drawings, and reports) contained in its proposal or generated by or on behalf of the proposer for the purpose of developing its proposal without compensation or consideration to the proposer, except such work product specifically labeled as a Trade Secret or Proprietary. By submitting a proposal, each proposer acknowledges that the District may incorporate and use such work product or concepts based thereon in the performance of its functions. The use of any of the work product by the District is at the sole risk and discretion of the District and shall in no way be deemed to confer liability on the unsuccessful proposer. By submitting a proposal, each proposer acknowledges and agrees that it does not have the right to keep the contents of its proposal from being used by the District, as described herein.

EXHIBIT A

Non-Collusion Certification

The party making the foregoing proposal, affirms that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the proposer has not directly or indirectly induced or solicited any other proposer to put in a false or sham proposal, and has not directly or indirectly colluded, conspired, connived, or agreed with any proposer or anyone else to put in a sham proposal, or that anyone shall refrain from proposing; that the proposer has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the proposer or any other proposer, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the proposal are true; and further, that the proposer has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any depository, or to any member or agent thereof to effectuate a collusive or sham proposal.

Name of Firm: _____

Signature: _____

Printed Name: _____

Title of Signatory: _____

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