



**SANTA ROSA CITY SCHOOLS  
211 Ridgway Avenue  
Santa Rosa, CA 95401**

**Request for  
Qualifications  
And  
Proposals  
For  
Program/Construction  
Management Services**

**Request for Proposals Issued: January 3, 2023  
Deadline for Submittal of Responses: February 10, 2023**

**REQUEST FOR QUALIFICATIONS and PROPOSALS (RFQ/P)  
SELECTION OF CONSULTANT TO PROVIDE PROGRAM/CONSTRUCTION MANAGEMENT SERVICES  
FOR THE SANTA ROSA CITY SCHOOLS (SRCS) DISTRICT**

Santa Rosa City Schools (SRCS) is seeking Requests for Qualifications and Proposals (RFQ/P) from qualified persons, firms, partnerships, corporations, or organizations to perform planning, program management, and/or project/construction management services related to SRCS's Facility Master Plan (FMP). Services may include any or all of the following: program management, construction management, and may also include augmenting SRCS staff for either program management, construction management, or both. It is the intent of SRCS to approve one or more "preferred" firms that will be used to complete projects during the next several years that are currently funded or scheduled to be included in SRCS's Bond Measures that were approved by the voters in the November 2022 General Election.

Qualified persons, firms, and organizations are invited to submit five (5) **bound** originals, and one (1) flash drive with an electronic version of said RFQ/P that meet the requirements described herein no later than **2:00 p.m. on Friday, February 10, 2023**, to the following address:

**Mr. Erik Oden  
Director, Maintenance and Operations  
Santa Rosa City Schools  
211 Ridgway Avenue  
Santa Rosa, CA 95401  
eoden@srcs.k12.ca.us**

This Request for Qualifications/Proposals does not commit Santa Rosa City Schools to award a contract or pay any costs incurred in the preparation of a proposal responsive to this request. SRCS reserves the right to accept all or part of any RFQ/P or to cancel in part or in its entirety this Request for Qualifications/Proposals. SRCS further reserves the right to accept the RFQ/P that it considers to be in the best interest of SRCS.

Thank you for your interest in working with SRCS.

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Erik Oden  
Director, Maintenance and Operations  
SANTA ROSA CITY SCHOOLS

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**INSTRUCTIONS FOR SUBMITTAL OF RFQ/P'S****I. GENERAL INSTRUCTIONS****A. Submittal of RFQ/P'S**

RFQ/P's should be reviewed for accuracy before submission to SRCS since said document may not be adjusted after submission to SRCS. SRCS will not be responsible for errors or omissions in any RFQ/P. SRCS reserves the right to reject any and all RFQ/P's, or to waive any irregularities, or informalities in the RFQ/P's.

**B. Signatures**

All RFQ/P's must include a signature of an authorized officer of the firm submitting the RFQ/P. A signature form has been included with this document.

**C. Disqualified RFQ/P's**

Any RFQ/P received after **2:00 p.m. on Friday, February 10, 2023**, shall be refused and returned to the firm unopened.

**D. Withdrawal of RFQ/P's**

Firms may withdraw their RFQ/P, either personally or by written request, at any time prior to **2:00 p.m. Friday, February 10, 2023**. Any request to withdraw an RFQ/P is effective only if received on or before **2:00 p.m. on Friday, February 10, 2023** at the following location and addressed to:

Mr. Erik Oden, Director, Maintenance and Operations  
Santa Rosa City Schools  
211 Ridgway Avenue  
Santa Rosa, California 95401

**E. Copies of RFQ/P's**

Each firm submitting an RFQ/P must include five (5) **bound** originals, and one (1) flash drive with an electronic version of the RFQ/P.

**F. Contacts**

In order to control information disseminated regarding this RFQ/P, firms interested in submitting RFQ/P's are directed **not** to make personal contact with members of the Board of Trustees and SRCS Administration with the exception of the individual listed below:

**Mr. Erik Oden, Director, Maintenance and Operations**  
**Santa Rosa City Schools**  
**211 Ridgway Avenue**  
**Santa Rosa, CA 95401**

Phone: (707) 890-3800 x 80230

E-Mail Address: [eoden@srcs.k12.ca.us](mailto:eoden@srcs.k12.ca.us)

Mrs. Kelley Cook, Director of Purchasing

Santa Rosa City Schools

211 Ridgway Avenue

Santa Rosa, CA 95401

Phone: (707) 890-3800 x 80223

E-Mail Address: [kcook@srcs.k12.ca.us](mailto:kcook@srcs.k12.ca.us)

Any questions concerning this Request for RFQ/P's must be submitted *by email* to the above address no later than **January 31, 2023**. Responses to individual queries will be provided as soon as possible. An anonymous summary of all Q&A's will be emailed to all interested Respondents **no later than February 3, 2023**. Respondents who wish to be placed on an email list to receive the summary Q&A's and any updates concerning this Request for RFQ/P's must email [eoden@srcs.k12.ca.us](mailto:eoden@srcs.k12.ca.us) and [kcook@srcs.k12.ca.us](mailto:kcook@srcs.k12.ca.us) to request placement on the email list.

#### **G. SRCS Required Forms**

Your RFQ/P must include SRCS Required Documents that are enclosed herein which include the Offer to Enter into Agreement; Terms and Conditions; and Non-Collusion Affidavit.

#### **H. Rights of the SRCS**

SRCS reserves the right to incorporate terms and conditions it determines to be proper or necessary into any contract negotiated as a result of a RFQ/P submitted in response to this RFQ/P.

## **II. PURPOSE OF REQUEST FOR QUALIFICATIONS/PROPOSALS**

#### **A. Selection of Qualified Organization**

SRCS intends to select one or more firms that best meet SRCS's needs to perform the planning, program management, and project/construction management services as described in this RFQ/P. SRCS may assign all or parts of the work described below to one or more of the successful firm(s). The criteria on which SRCS makes its determination will not be limited to the amount of proposed fees, but will also be based on ability and experience as described herein. The successful firms must have the demonstrated ability to complete the requirements of the RFQ/P within an agreed upon timeline and at a competitive agreed upon fee.

## **III. DESCRIPTION OF SERVICES REQUIRED**

**A. Background Information**

Santa Rosa City Schools operates under a locally-elected seven-member Board form of government and provides educational services to grades TK-12<sup>th</sup> as mandated by the State and/or Federal agencies. The District is a common board/common administration district consisting of the City of Santa Rosa Elementary School District and the City of Santa Rosa High School District. For many operational purposes, the district combines its financial activity under the authority of Education Code Section 35110, et seq., but for debt financing purposes each district operates independently. The District operates ten (10) elementary schools, five (5) middle schools, five (5) high schools, four (4) charter schools, and one (1) continuation school. The Santa Rosa Elementary School District has an enrollment of approximately 4,100 students. The Santa Rosa High School District has an enrollment of approximately 11,000 students. In addition, there are approximately 1,300 students in district-authorized/operated charter schools.

SRCS has completed a long-range Facility Master Plan (FMP) and is currently working with a firm to update/revise the FMP. The master plan includes, and will include, demographic information, proposed improvements to existing campuses based on updated SRCS educational specifications and standards, proposed improvements to existing campuses, a review of estimated local funds currently available for facility improvements, estimated possible State funds for which the SRCS is eligible. The FMP may be viewed at <http://www.srcsbond.news/>.

SRCS intends to enter into agreements with program/construction management firms for services as identified in the RFQ/P. Further, it is the intent of SRCS to use the RFQ/P's submitted in response to this RFQ/P as the basis for determining the selected program/construction management firms to work with SRCS staff in the implementation of SRCS's long-range FMP. Depending of the quality of responses, SRCS reserves the right to select one or more program/construction management firms as its "preferred" program/construction management firm.

**B. Services Required of Selected Firm**

The firm(s) selected as a result of this process shall be responsible for the following general categories of work:

- 1. Implementation of Master Plan**—Using the completed and upcoming revised SRCS Long-Range FMP, the selected firm shall update cost estimates, provide feedback on appropriate scope, and advise SRCS on phasing, grouping of projects, and other cost saving methods.

2. **Program Management**—Work with SRCS on overall scheduling, budgets, and communication for all capital projects; report to SRCS on program and individual project status on a regular basis. More specifically:
- Assist SRCS in prioritizing construction projects
  - Verify and update cost estimates
  - Assist SRCS in the development of the timing of construction projects
  - Assist SRCS in the development of a project communication plan that includes project participants, SRCS administration, school site personnel, parents, and the updating of SRCS’s website.
  - Work with SRCS staff in the development and maintenance of reporting systems for the scoping, sequencing, scheduling, budgeting, and communication for all capital facility projects.
  - Advise SRCS in the selection of the Inspector of Record (IOR) and coordinate the work of sub-consultants (Department of Toxic Substances Control (DTSC), California Environmental Quality Act (CEQA), etc.)
  - Advise on an ongoing basis the status of submittal and approval of projects by various local and State agencies including, but not limited to, DSA, OPSC, and CDE.
3. **Project and Construction Management**—Provide design-phase services in conjunction with all architectural firms awarded work by SRCS; assist with bidding; manage the construction contracts and “close-out” the projects. Assist SRCS in the selection of the most appropriate construction delivery method (design, bid, built; construction management/multiple prime; lease/leaseback, design/build, etc.) More specifically:
- **Design Phase**—Work with SRCS staff and architects to develop and refine designs to correlate design and scope to project budget; assist with verification of site conditions; perform constructability reviews at appropriate stages of design; assist in segregating bid packages for maximum cost effectiveness; advise SRCS staff regarding owner-supplied equipment and other potential cost-saving measures; report to SRCS staff on the status of design and State and local agency approvals versus the approved schedule; assist in obtaining all necessary approvals; attend meetings as required;
  - **Pre-Construction & Bidding Phase**—Evaluate each project and assist SRCS staff and other consultants (architects, engineers, etc.) in the development of the initial budget and budget updates for each project. Work with SRCS staff in conducting pre-bid conferences, conduct pre-construction meetings, assist with prequalification and the evaluation of responses, participate in the bidding process and reporting to SRCS staff on bid results, assist in dealing with any bid protests and assist SRCS staff in coordinating contracts with selected low bidders including the evaluation of bonds, insurance, conformance with DIR requirements, and DVBE compliance.

- Construction Phase—Assist SRCS staff in the administration and coordination of the following aspects of the construction project: monitor the work of contractors on a daily basis; enforce performance, scheduling, and notice requirements; monitor schedule and cost information for each contractor for each project; document the progress and cost of each project; report and advise proactively on potential schedule and budget variances and impacts on schedules and budgets; recommend potential solutions to schedule and cost issues; work cooperatively with architects and contractors; attend weekly job site meetings and prepare and circulate weekly job site minutes when required; evaluate and process payment applications; evaluate and process change order requests; evaluate and track requests for information (RFI's) and responses; work with SRCS staff and architect to develop lists of incomplete or unsatisfactory work (punch lists); submit necessary reports to State authorities including DSA verified reports; ensure that all documents from all parties are submitted to DSA in a timely manner to complete project closeout.
  - Post-Construction Phase—Work with SRCS staff to ensure completion of all punch list work; coordinate contractor closeout requirements including obtaining all guarantee documents, keys, as-built drawings, daily logs, and verified reports; monitor warranty work if requested; coordinate systems training with SRCS staff and contractors and assist in the moving SRCS staff into new/renovated facilities upon project closeout.
4. **Coordinate with SRCS Facilities Staff**—Coordinate with existing SRCS facilities staff that could include augmentation of SRCS staff for either program or construction management services or both.

#### IV. CONTENTS OF REQUEST FOR QUALIFICATIONS/PROPOSALS

##### A. General

In order for RFQ/P's to be considered, said RFQ/P must be clear, concise, complete, well organized and demonstrate both respondent's qualifications and its ability to follow instructions. The quality of answers, not length of responses or visual exhibits is what is important in the RFQ/P response.

Respondents shall submit five (5) **bound** originals of the RFQ/P in 12-point font and, all copies shall be spiral bound into books of approximately 8 ½" x 11" format, **not to exceed twenty-five (25) pages**. Further, one (1) flash drive with an electronic version of the RFQ/P shall also be made available to SRCS at the time the RFQ/P is submitted. **The envelope in which the bound copies are submitted must identify the title of the RFQ/P.** Although not required, firms responding to this RFQ/P are permitted to

include an appendix limited to samples of past projects that will **NOT** be considered part of the twenty-five (25) page limit.

All respondents shall follow the order and format specified below. Each section of the RFQ/P shall be tabbed to correspond to the numbers/headers shown below:

**B. Submittal Letter**

The cover letter shall be brief (two pages maximum). Include the RFQ/P's title and submittal due date, the name, address, fax number, and telephone number of the responding firm (or firms if there is a joint venture or association). If the firm is proposing to co-respond with another principal firm, the cover letter must specify the type of services to be provided by each firm and the proposed percentage allocated to that phase or function for the co-respondent. The submittal letter will **NOT** be considered part of the twenty-five (25) page limit.

**C. Table of Contents**

Include complete and clear listings of headings and pages to allow easy reference to key information. The table of contents will **NOT** be considered part of the twenty-five (25) page limit.

**D. DVBE Requirements**

Describe the firm's Disabled Veteran Business Enterprise (DVBE) contract capabilities and your ability to meet any State requirement related to DVBE.

**E. Description of Firm**

This section should provide SRCS information regarding the size, location, nature of work performed, years in business, and approach that will be used in meeting the needs of SRCS.

**F. Project Team**

The selected firm shall employ at its expense professionals properly licensed and skilled in the execution of the functions required for the planning, program management, and project/construction management of the projects.

Identify the key personnel that would be assigned to SRCS for each phase of the work and their respective roles. In addition, identify the experience each member of your professional team and support staff to be assigned to SRCS has in working on school District (K-12) capital facility programs including experience in working with local and State agencies including Division of the State Architect (DSA), DTSC, CDE, OPSC, etc.

**G. Experience of Firm with California K-12 Schools**

Describe experiences your firm has in assisting K-12 schools in California in providing program, planning, and constructions services as outlined in this RFQ/P.



**H. References**

Identify at least five (5) California school districts in which you have provided consulting services as described in this RFQ/P under a direct contract with. Further, use this section of the proposal to indicate the areas of expertise you have previously provided and how the firm's expertise will enable SRCS to benefit from said expertise. Include the name of the District, the size of the District, the type of services provided, a description of the project and the dollar amount of the project.

**I. Proposed Methodology and Capabilities**

Describe the technical capabilities for scheduling, budgeting, cost estimating, document control, and public information web sites used by your firm in working with K-12 California schools. Provide recent examples of reports for each of the above categories.

**J. Legal Issues**

Please respond to each of the following questions:

- Is there currently any legal action pending against your firm by another public agency related to services, or lack thereof, provided by your firm?
- Have there been any settlements or judgments involving such actions within the last ten (10) years? Please describe each such settlement or judgment, including the nature of the action and the amount of recovery?
- Within the past ten (10) years, has your firm ever had a professional engineering services contract terminated by a California public agency? If yes, please identify the name of the public agency and the reason for the termination.

**K. Fees**

With the understanding, the contract management fees for projects are negotiable depending on the size and number of projects assigned to a firm, summarize your firm's fee proposal based on the type of projects included in SRCS's Facility Master Plan (additions to existing campuses, modernization, rehabilitation, renovation, technology, etc.). Firms are encouraged but not required to be "creative" in their fee proposal by submitting a proposal that does not "mirror" the former fee schedule used by the Office of Public School Construction prior to the adoption of SB 50 in 1998.

Each firm is encouraged to provide any additional information or description of resources that are pertinent for this project.

**L. Insurance**

If selected, your firm must submit proof of ability to provide insurance as appropriate

covering professional liability, general liability, workers' compensation, etc.

## V. SELECTION PROCESS

### A. Initial Screening – Phase I

The SRCS Superintendent or designee will appoint a Selection Committee composed of SRCS staff and individuals experienced in program and construction management services to screen applicants and select firms for oral interviews.

Target Date for Screening and Selection of Firms for Interviews:  
**February 15, 2023.**

### B. Oral Interviews – Phase II

A panel composed of SRCS staff as well as individuals experienced professional engineering services along with the SRCS Superintendent or designee will interview firms selected for oral interviews. Upon completion of oral interviews, the panel will select "preferred" program/construction management firms to be recommended to the Board of Trustees for consideration and approval.

Target Date for Selected Firm Interviews: **Week of February 20, 2023**

### C. Appointment of Firm(s) to Serve as Preferred Program/Construction Management Firms

The Board of Trustees will review the recommendation of the oral interview panel and SRCS superintendent or designee and consider the appointment of the program/construction management firms to serve as SRCS's "preferred" program/construction management firms.

Target Date for Approval by Board of Trustees of Selected Firm: **March 8, 2023**

## VI. SELECTION CRITERIA

Firms submitting RFQ/P's are advised that all RFQ/P's will be evaluated to determine the firm that will meet the needs of SRCS. Evaluation will include, but not be limited to the following criteria:

- Understanding the goals of SRCS and its projects
- Experience in the working with California K-12 schools
- The ability to provide high quality services in a cost effective manner
- Firm's overall capability, stability, and available resources
- Ability to complete tasks within a timely and efficient manner
- Experience in working large, highly diverse urban schools
- Experience of project team assigned to the project
- Familiarity with the SRCS's educational facilities
- Knowledge of the positives and negatives of SRCS as perceived by the community
- Ability to deliver projects within budget and on time
- Proposed fee schedule

– References

The Board of Trustees of SRCS reserves the right to accept or reject any or all RFQ/P's, to select a qualified firm with or without interviews and to negotiate with one or more than one of the responsible submitters. Submitters shall be responsible for any and all expenses that they may incur in preparing proposals. Responses received from this RFQ/P will be used as the foundation for the development of an agreement and contract with specific provisions subject to review, negotiations, and approval of the Santa Rosa City Schools Board of Trustees and SRCS Superintendent or designee.

**PROPOSAL FORM**

The Board of Trustees of SRCS will select “preferred” program/construction management firms to perform services as described in this RFQ/P. Once appointed by the Board of Trustees, the selected “preferred” firms shall be expected to enter into a contract with SRCS acceptable to both parties within 15 days following notification of being selected to complete the project(s) as described in the RFQ/P.

The following “**Offer to Enter into Agreement**” must be completed and included with responses to the RFQ/P in order for the proposal to be accepted by SRCS. As a final reminder, all proposals must be received in the Maintenance and Operations office, Santa Rosa City Schools, 211 Ridgway Avenue, Santa Rosa, CA, 95401 no later than **2:00 p.m. on Friday, February 10, 2023.**

**OFFER TO ENTER INTO AGREEMENT**

The undersigned hereby proposes to enter into an agreement with the Santa Rosa City Schools and furnish services as outlined in the request for qualifications subject to the terms and conditions contained herein.

**Name and Address of Firm  
or Employee of Firm**

**Signature of Authorized Officer**

\_\_\_\_\_  
Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Address

\_\_\_\_\_  
Title

\_\_\_\_\_  
City and State

\_\_\_\_\_  
Date

\_\_\_\_\_  
Telephone Number

\_\_\_\_\_  
Fax Number

\_\_\_\_\_  
Email Address

**NONCOLLUSION DECLARATION**

*To be executed by the respondent and submitted with the proposal.*

\_\_\_\_\_, declares and says that he or she is \_\_\_\_\_ of \_\_\_\_\_, the party making the foregoing proposal, and 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 a sham; that the respondent has not directly or indirectly induced or solicited any other respondent to put in a false or sham proposal, and has not directly or indirectly colluded, conspired, connived, or agreed with any respondent or anyone else to put in a sham proposal, or that anyone shall refrain from responding; that the respondent has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the respondent or any other respondent, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other respondent, 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 correct; and, further, that the respondent 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 fee to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham proposal.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date: \_\_\_\_\_  
Signature \_\_\_\_\_

State of \_\_\_\_\_

County of \_\_\_\_\_