

Natomas Unified School District

1901 Arena Boulevard
Sacramento, CA 95834

February 28, 2023

<p>REQUEST FOR STATEMENT OF QUALIFICATIONS/ PROPOSALS No. 23-01 ARCHITECTURAL / DESIGN SERVICES FOR DISTRICT WIDE MASTER PLANNING, MODERNIZATION AND CONSTRUCTION OF SCHOOL FACILITIES</p>

The Natomas School District ("District") is inviting submittals from qualified architects ("Architect") for the planning, modernization and construction of District facilities consistent with the District's boundary ("Project").

The District intends to determine a pool of pre-qualified and experienced firms to provide architectural services to design, modernize and construct school facilities according to District requirements. The District will use this pool of pre-qualified architects to easily procure services in an expeditious manner as project needs arise.

One of the award evaluation criteria will be the demonstrated expertise in design for construction and modernization of school facilities and familiarity with school facilities master planning. It is strongly recommended that the proposer, in its statement of qualifications, clearly detail its experience, familiarity and demonstrated success performing similar work for other school districts, community college districts and other public agencies.

The District requires flexibility on project delivery methods so the Architect should be capable of providing architectural services in either Design-Bid-Build, Design Build or Lease-Leaseback construction delivery methods.

The District intends to hire one Architect for creation of a Facility Master Plan. To be considered for the Facilities Master Plan, Architectural firms should provide a proposal for the master plan component.

Six (6) hard copies of your complete statement in response to this RFQ/P and one (1) electronic copy of your statement in PDF format must be received by the District via hand delivery by **12:00 PM on March 24, 2023** at the following address:

**Natomas Unified School District
Attn: Jen Mellor, Director of Facilities
1901 Arena Boulevard
Sacramento, CA 95834**

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

Questions regarding this RFQ/P may be directed to Jen Mellor at jmellor@natomasunified.org.

No other members of the District's staff or Board should be contacted about this procurement during the RFQ/P process. Any and all inquiries and comments regarding this RFQ/P must be communicated in writing, unless otherwise instructed by the District. 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 RFQ/P. The District makes no representation that any contract will be awarded to any proposer responding to this RFQ/P. The District expressly reserves the right to postpone statement consideration for its own convenience, to waive any informality or irregularity in a statement received, and to reject any and all statements received in response to this RFQ/P.

I. INTRODUCTION

The Natomas Unified School District (District) is a school district operating and existing under the laws of the State of California. With this RFQ/P, the District is inviting submittals from qualified and experienced architectural firms that can perform the services described herein.

II. PROJECT DESCRIPTION

GENERAL

The Natomas Unified School District is located in Sacramento and covers an area of 38.2 square miles. It has an enrollment of approximately 16,700 PK-12 students.

As part of the District's plan to better meet District and community needs, the District is determining a pool of pre-qualified architects to easily procure services in an expeditious manner as project needs arise. Architects from this pool will be selected to provide architectural design services for District-wide modernization, construction of school facilities, and creation of a Facilities Master Plan.

The anticipated design services and projects may include, but are not limited to:

District-wide Planning

The District would like architectural services to assist with the update to the existing Facilities Master Plan.

Modernization and New Construction

The District would like architectural services to assist with the design of new projects resulting from current and future growth in the region, future local and state bond passages, Proposition 39 funding, potential future grants and potential class size reduction. Potential projects resulting from these funding sources may include the placement of relocatable classrooms, modernization and renovation projects, new school designs, energy efficient retrofits and renewable energy projects.

III. ANTICIPATED REQUIRED SERVICES

Specific services may differ depending on project needs. However, selected pre-qualified architects should be able to:

- Prepare the design-criteria, plans, specifications and other project-specific material. The documents shall be of sufficient detail to show design intent of the District with regard to the project and allow potential contractors to prepare a detailed proposal in response to a request for proposals or bid on the project as applicable.

- Assist and work with District counsel and future construction manager in selection of a Design-Bid-Build or a Lease-Leaseback delivery on applicable projects.
- Participate in all meetings determined to be necessary to ensure successful completion of the project on applicable projects.
- Respond to RFIs submitted by general contractors, construction managers and other entities performing work on applicable projects.
- Prepare plans and documents required by the California Department of Education (CDE) and the Division of the State Architect (DSA) on applicable projects.
- Review available documentation, verify existing field conditions and confirm the accuracy of as-built documents to prepare for design documents on applicable projects.
- Prepare project schedule, budget and design documents which satisfy the requirements of the State's School Facilities Program (or successor program) and the District Educational Specifications and/or guidelines on applicable projects.
- Prepare all necessary bidding information and forms required by the District and assist the District throughout the bid process on applicable projects.
- Prepare all necessary schematic/ design and construction documents such as an estimated project cost summary of submittal to the District and other agencies requiring submittal for project approval on applicable projects.
- Prepare as-builts of completed projects on applicable projects.
- Track process and submit all required close-out documentation required by DSA and/or any other regulatory agency for applicable projects.

Please Note: The responsibilities and duties listed herein are stated in general terms and are for informational purposes only. The parties shall negotiate a final agreement after a recommended firm has been selected.

IV. TERMS AND CONDITIONS

A. Personnel

The selected firm's personnel shall be capable of performing the work described herein with minimal guidance or direction. All personnel who will be involved in inspecting or overseeing work performed on the Project shall have prior experience working on and successfully delivering public projects of similar scope and size.

Experience working on projects using the Design-Bid-Build and Lease-Leaseback construction delivery methods are highly desired.

B. Applicable Laws and Regulations

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.

C. Deadlines, Schedules and Location for Submission

Advertisement: February 28, 2023 and March 7, 2023

RFI Deadline: March 14, 2023, 5:00 pm

Addenda Issued: March 16, 2023 on District webpage

Response Due: March 24, 2023
Time: 12:00:00 p.m. PST
Place: Natomas Unified School District
Facilities and Strategic Planning
Attn: Jen Mellor
1901 Arena Boulevard
Sacramento, CA 95834

Interviews of Firms: April 3-7, 2023

Board Meeting/Award: May 10, 2023

Submissions may be withdrawn at any time prior to the closing date and time for receipt thereof specified above.

D. Local Office

Firm must have a local office. Local is considered within 60 miles of the Natomas Unified School District office, 1901 Arena Blvd, Sacramento, CA 95834.

INSTRUCTIONS TO PROPOSERS

A. GENERAL

1. Questions and Inquiries

Any questions regarding this RFQ/P shall be directed, in writing, to the District representative specified below. Transmission of questions may be made in writing only, and must be received by the District not later than the date and time established above in the tentative schedule. All such requests must be accompanied by all relevant information supporting the request for modification, interpretation, or clarification of this RFQ/P. 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 of Education prior to the final selection of a firm for the Project. Any prohibited communications may result in immediate disqualification of a proposer's response to this RFQ/P.

District Representative:

Name: **Jen Mellor, Director of Facilities**

Telephone: 916-567-5467

Email: jmellor@natomasunified.org

2. Statement Validity Period

The proposer agrees that its statement will remain valid for 180 calendar days ("Validity Period") following the Statement Due Date. The District may request an extension of the Validity Period. Once award is made to a proposer, all elements of that proposer's statement shall remain valid until the completion of the Project where an agreement is executed, including exercise of any potential options.

3. Public Records

All statements submitted in response to this RFQ/P become the property of the District and responses to this RFQ/P are subject to the provisions of the California Public Records Act (Government Code Section 6250 *et seq.*) and Public Contract Code (PCC) Section 10165.

Documents provided by the proposer marked Trade Secret, Confidential, or Proprietary; and any financial records provided by the proposer shall be clearly identified, labeled, and addressed. The District agrees to safeguard the documents to the best of its ability, and all information contained therein, against disclosure but only to the fullest extent permitted by law. However, in the event of arbitration or litigation, the documents shall be subject to discovery, and the District assumes no responsibility for safeguarding the documents, unless the proposer has obtained an appropriate protective order issued by the arbitrator or the court. A proposer has the duty of clearly labeling any Trade Secret, Confidential or Proprietary information as such. No liability will attach to the District for the errant release of Trade Secret information by the District under any circumstances.

B. INSTRUCTIONS FOR SUBMITTING RESPONSE

Each firm responding to the RFQ/P shall address the following items in its response. The response is limited to 30 pages total. (Tabs, resumes, table of contents are not included in 30-page limit. Response sections may be combined on a page. Proposal for FMP not counted towards page limit).

Each item below shall be separated and clearly marked by tabs, or other means, to allow for easy review by the District.

1. Cover Letter

A maximum one-page, dated introductory letter must be submitted including the legal name of the respondent, address, telephone and fax numbers, RFQ/P 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 statement should follow the cover letter.

3. Executive Summary

The executive summary should contain (1) brief description of the firm's history; (2) an outline of the firm's philosophy concerning architectural services on public projects, particularly school construction projects; (3) a synopsis of the firm's approach to successfully working with school districts on the preparation of documents for school construction projects of similar size and magnitude; and, (4) 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 statement.

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 the names of all key positions with titles and their specific task assignments for these potential projects on an organizational chart. Provide the background, including resumes, qualifications and relevant experience of employees whom the firm expects will be utilized on the Project and will make up the Project team. By submitting a statement, proposer acknowledges that the District is making a selection based on the experience and qualifications of the team presented in the statement and any changes to the team without the consent of the District may constitute a breach of contract by the proposer.

Identify the names of firms and individuals that will perform any sub consultant work (i.e. outside firms providing cost estimating, planning, architectural design, structural, mechanical or electrical engineering services). Provide resumes, qualifications and relevant experiences of each person to be involved in the program.

6. Experience in Providing Documents for Public Construction Projects

Provide a comprehensive narrative of your firm's experience working with other California public school districts and other public agencies in successfully providing architectural services associated with the preparation of documents for use on the construction of a public project of similar size and scope as the Project. This narrative should clearly demonstrate your firm's experience and qualifications to be able to successfully provide the services described herein.

The narrative should address the following: An explanation of your experience with the California Department of Education (“CDE”), the Office of Public School Construction (“OPSC”), the Division of the State Architect (“DSA”), the Uniform Building Code (“UBC”), and Title 24 of the California Code of Regulations. **Such experience shall be considered mandatory for any firm submitting a statement in response to this RFQ/P.**

- A description of your firm's experience working on projects that used the Design-Build and Lease-Leaseback construction delivery methods for the final design and construction of a public school project. Evidence that your firm and personnel proposed in your statement have the expertise and experience in construction project design review and evaluation, scheduling, and cost estimating to carry out the professional services described herein.
- Demonstrated experience in delivering projects via Building Information Modeling (BIM) (*new campuses and significant modernizations only*)
- Information on firm's experience in producing innovative energy efficient designs and evidence of a clear understanding of available energy initiatives to K-12 school districts.
- Demonstrated experience providing architectural services for K-12 bond projects.
- Evidence of experience providing outreach to District stakeholders in both a governing board meeting and public forum setting whereby updates on the Project are provided and questions are answered by your firm.
- Discuss your knowledge and approach toward the following: (1) Reviewing architectural design concepts, principles and standards; (2) Supervisory principles, practices and procedures; (3) Building construction methods and materials; (4) Compliance with local building codes and ordinances and accepted standards of quality for public projects; (5) Coordination with Project owner, CM and contractor(s); and (6) Project design for school construction projects on working school campus.

Your narrative should be complete and clear to provide an insightful, straightforward, and concise overview of the capabilities of your company. Inclusion of additional facts, information and examples of previous work are encouraged if it will help to highlight your firm’s qualifications and experience.

7. Budget/Completion History

Provide project budget information from your five (5) most recent, DSA approved, school architectural projects. Include estimate at construction document phase and final contract amount. Please give detailed information for each job including a contact name with contact information. Provide original schedule and completion dates.

8. Litigation History

The firm shall list all litigation 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 the firm's consultants as defendants of any type. State the nature of the complaint, 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.

9. 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).

10. 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.

The selected proposer will be required to provide the following minimum amount of insurance coverage:

Comprehensive General Liability (including operations, products and completed operations, as applicable): \$1,000,000 per occurrence, \$2,000,000 aggregate for bodily injury, personal injury & property damage. If commercial general liability insurance or other form with general aggregate limit is used, either the general aggregate limit shall apply separately to this project/location or the general aggregate limit shall be twice the required occurrence limit.

Automobile Liability: \$1,000,000 per accident for bodily injury and property damage.
Workers Compensation: As required by the State of California.

Professional Liability/ Errors & Omissions Liability: \$1,000,000 per occurrence,
\$2,000,000 aggregate.

Worker's Compensation: As required by State of California.

Endorsements shall clearly state that the District is named as an “Additional Insured” under the policy described and that such insurance policy shall be primary to any insurance or self-insurance maintained by the District.

The District reserves the right to require higher insurance limits on a project-by-project basis.

11. References

The proposer shall list a minimum of five (5) references for whom the firm has provided services in California for school district construction projects. 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

Lists, photos, and literature on related projects performed by the individuals expected to make up the Project team may be included. Do not include projects completed by other branch offices or by individuals that are not part of the proposed Project team.

12. Project Plan and Methodology

Describe the procedures and safeguards the firm will employ to ensure that the needs of the District will be satisfied, including completion of the architect services requested herein in a cost-effective and timely manner.

13. Schedule

Provide a detailed schedule (from previous project, or generic) for a new construction TK-5 school, and demonstrate the firm's ability to meet this schedule. Describe how the firm

manages and controls planning and design costs, prevents project scope increases, and is able to provide the highest quality design and planning in relation to fees.

14. 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 providing the requested services for the Project.

15. 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.

16. Fee Estimate Range/Terms

Describe the method proposed by the architect for calculating and charging fees for performance of the work on the Project.

If the proposed fee approach includes hourly rates for additional services, describe the additional services and the hourly rates or costs associated with these services.

Identify whether the architect proposes to bill reimbursable costs at cost or to add a mark-up to such costs.

The final fee for completion of the work shall be negotiated with the District should the architect be selected to perform the work.

17. Facility Master Plan

The District will be using the 2017 Facility Master Plan as a starting point for an updated FMP. Each firm that wishes to be considered by the District to partner in the creation of the updated FMP shall provide the following.

- a. Provide a copy of the facility master plan prepared for a comparable district with a similar scope of services requested within the last five (5) years.
- b. Provide a detailed schedule to complete an updated FMP by June 2024.
- c. Provide list of Master Plans firm has prepared.
- d. Provide references for Master Plans.

- e. Provide cost proposal.
- f. The team proposed must remain intact during the procurement process and the life of the Project, if the proposer is selected, unless agreed to otherwise in writing by District.
- g. As part of the FMP development, firm would also update K-8 Education Specification and develop High School Education Specification.

C. DISTRICT'S EVALUATION PROCESS

Upon the District's receipt of the statements, each proposer will be reviewed for (a) minor informalities, irregularities, and apparent clerical mistakes which are unrelated to the substantive content of the statement; (b) conformance to the RFQ/P instructions regarding organization and format; and (c) the responsiveness of the proposer to the requirements set forth in this RFQ/P. Those statements determined to not be responsive to the requirements of this RFQ/P may be excluded from further consideration and the proposer may be so advised. The District may also exclude from consideration any proposer whose RFQ/P contains a material misrepresentation. The District reserves the right to reject any or all statements, to waive minor technicalities or to advertise for new statements of qualifications, if in the judgment of the District, such course of action is in the best interests of the District.

The District will establish a Selection Committee for the purpose of reviewing and evaluating statements submitted in response to the RFQ/P. Qualifications and relevant experience in producing similar types of plans for similar clients and settings will be extremely important in the selection process. The Selection Committee will consider the following criteria:

- Experience with school facility planning and design;
- Evidence of ability to accurately communicate the assessment of District facilities;
- Familiarity with best practices in sustainable design and planning of school facilities;
- Cost effective, high quality planning and design services;
- Skill in facilitating complex community and District involvement process;
- Ability to complete the planning tasks within the scheduled time frame;
- Creative problem solving in design and planning

The District will not provide detailed scoring criteria or evaluation of submittals to respondents.

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

The District may perform an investigation of the proposers that extends beyond contacting the school districts or other entities identified in the statements. 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.

The following are conditions precedent to final award of the contract(s): (a) successful completion of negotiations; (b) receipt by District of all of the documents required to be provided prior to execution of the contracts; and (c) any other conditions required by the District's governing board. Final award will be evidenced by execution of the agreement by the District's designee following any necessary approvals by the District's governing board.

D. MISCELLANEOUS

The individual or official of firm who has the authority to contractually bind firm must sign the RFQ/P response.

The RFQ/P 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 RFQ/P, participation in interviews or in anticipation of any contract.

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

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

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 statement or generated by or on behalf of the proposer for the purpose of developing its statement without compensation or consideration to the proposer, except such work product specifically labeled as a Trade Secret or Proprietary. By submitting a statement, 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 statement, each proposer acknowledges and

agrees that it does not have the right to keep the contents of its statement from being used by the District, as described herein.

Responses may be rejected if they do not provide the information requested herein in the format requested, or if submitted without all required information and signatures.

CERTIFICATION

I certify that I have read the attached **Request for Qualifications – Architectural and Design Services for District Wide Master Planning, Modernization and Construction of School Facilities** and the instructions for providing a response. I further certify that I acknowledge having to submit six (6) copies and one (1) electronic PDF copy of the firm’s response to this request and that I am authorized to commit the firm to the qualifications submitted.

Signature

Type or Print Name

Title

Company

Address

Telephone

Fax

corporation, Date
corporate seal

If you are responding as a corporation, please provide your corporate seal here:

All materials submitted in response to this RFQ/P shall become the property of the Natomas Unified School District.

RFQ/P FORM A

STATEMENT SUBMITTAL ACKNOWLEDGMENT
(Proposer to complete and return form with statement)

Proposer: _____

Project Name: _____

RFQ/P Advertisement Date: _____

RFQ/P Submittal Date: _____

Natomas School District
1901 Arena Blvd.
Sacramento, CA 95834

Ladies and Gentlemen:

The undersigned (“Proposer”) submits this Statement in response to the RFQ/P issued by the District, including any and all Addenda, to complete the work described in the RFQ/P. Please note that initially capitalized terms not otherwise defined herein shall have the meanings set forth in the RFQ/P.

By signing below, Proposer acknowledges receipt, understanding, and full consideration of all materials posted on the website including all Addenda. Proposer represents and warrants that it has read the RFQ/P and agrees to abide by the contents and terms of the RFQ/P.

Proposer further understands that all costs and expenses incurred by it in preparing a response to this RFQ/P and participating in the Project procurement process will be borne solely by the Proposer.

This RFQ/P shall be governed by and construed in all respects according to the laws of the State of California.

Name of Authorized Representative
of Proposer (Point of Contact): _____

Representative Title: _____

Firm Name: _____

Phone: _____

Fax: _____

Email: _____

Proposer's business address, if different than Authorized Representative:

Address: _____

City: _____

State: _____

ZIP: _____

State or Country of
Incorporation/Formation/Organization: _____

By executing and submitting this form, the Proposer confirms that the Authorized Representative named above is authorized to act as agent on behalf of the Respondent with regard to this RFQ/P.

Signature of Authorized Representative

Date: _____

RFQ/P FORM B

**PREVIOUS DISQUALIFICATION, REMOVAL, OR OTHER
PREVENTION OF PROPOSING CERTIFICATION**

The Proposer shall complete, under penalty of perjury, the following questionnaire:

Has the Proposer or any major participant, any officer or any employee who has a proprietary interest thereof, ever been disqualified, removed, or otherwise prevented from proposing on, or completing a federal, state, or local government project because of a violation of law or a safety regulation? (Please circle one of the answers below)

YES

NO

If the answer is yes, explain the circumstances in the following space:

Name of Proposer: _____

Signature of Proposer: _____

Date: _____