

WOODLAND JOINT UNIFIED SCHOOL DISTRICT
MAINTENANCE, OPERATIONS & FACILITIES DEPARTMENT
910 College Street
Woodland, CA 95695

REQUEST FOR QUALIFICATIONS

PROGRAM and CONSTRUCTION MANAGEMENT SERVICES

NOTICE IS HEREBY given that the Board of Trustees of the Woodland Joint Unified School District will receive sealed qualifications and proposals marked ***RFQ PROGRAM and CONSTRUCTION MANAGEMENT SERVICES*** up to:

4:00 p.m. November 14, 2022

RFQ responses should be delivered to:

Woodland Joint Unified School District
Attn: Jim Helstowski, Director of Facilities
910 College Street
Woodland, CA 95695

On said date and time stipulated proposals are due but will not be publicly opened and read aloud at that time.

The Board reserves the right to accept or reject any or all proposals, or any part of any proposal, and to waive any informality or irregularity and to sit and act as sole judge of the merit and qualifications of the materials or services offered.

This is neither a formal request for bids, nor an offer by the District to contract with any party responding to this request.

Publish Dates: October 4, 2022 and October 11, 2022

WOODLAND JOINT UNIFIED SCHOOL DISTRICT

NOTICE INVITING QUALIFICATIONS and PROPOSALS

NOTICE IS HEREBY given that the Woodland Joint Unified School District is requesting qualified persons, firms, partnerships, corporations, associations, or professional organizations to perform the planning, coordination and program management services through the completion of the District's Measure Y Bond Program. Services may include any or all of the following: planning, coordination, program management, project management and construction management services. Responders are encouraged to submit proposals that identify your experience level with capital program management.

Woodland Joint Unified School District serves nearly 10,000 students from Woodland and the surrounding area. Voters within the District recognized the value of providing clean, safe and modernized schools by supporting the District's Measure Y, a \$44 million bond initiative. The District recently completed a district-wide facilities assessment and is currently engaged in the planning process for the initial projects and has a need for assistance with the construction management phases of work on renovation/reconstruction of its elementary and secondary schools. The District's current Facilities Assessment can be found here: <https://lpamasterplans.com/woodland-jUSD-fmp/planning/planning-overview/>

In addition, the District may also desire to contract with the successful firm for Program Management, Programming/Design and/or Preconstruction Phases of future projects.

Responders to this RFQ/P should mail or deliver three (3) bound copies and one (1) electronic copy of their Proposal, as further described herein, to:

Woodland Joint Unified School District
Attn: Jim Helstowski, Director of Facilities
910 College Street
Woodland, CA 95695

All responses are due by 4:00 p.m. on November 14, 2022. Fax or email responses will not be accepted.

All questions regarding this RFQ and requests for clarification must be submitted by email no later than 4:00 p.m. on October 21, 2022 to:

jim.helstowski@wjUSD.org

SECTION I. GENERAL INSTRUCTIONS

The District intends to select one or more firms that best meet the District's needs to perform the construction management services for the projects the District intends to pursue. The District may assign all or parts of the work described below to one or more of the successful firm(s). The criteria on which the District 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 District primarily uses the Lease-Leaseback delivery method. The District intends to retain the services of a firm or firms to perform all or part of the following services and reserves the right to modify the scope of work on one or more phases below as required. Responder's experience and proficiency in these areas is critical.

A. SUBMITTAL of STATEMENTS OF QUALIFICATIONS/PROPOSALS

If your firm wishes to submit a SOQ, provide three (3) copies – fully bound, and one (1) electronic copy. The contents of the SOQ shall be in accordance with the requirements set forth in this RFQ. Submittal packages should be addressed to the following location no later than 4:00 p.m. on November 14, 2022.

Woodland Joint Unified School District
Attn: Jim Helstowski
910 College Street
Woodland, CA 95695

B. REQUESTS FOR INFORMATION (RFI)

Questions must be submitted to the Director of Facilities VIA EMAIL at jim.helstowski@wjusd.org no later than 4:00 p.m. on October 21, 2022. Responses to questions received by the RFI deadline will be provided to the firm that submitted the question. A complete list of all questions and responses will be posted on the District website at <https://www.wjUSD.org/Departments/Maintenance-Operations-and-Facilities/index.html> by 4:00 p.m. on November 1, 2022.

C. SIGNATURES

All SOQ submittal packages must include signatures of an authorized officer of the firm submitting the SOQ. Failure to provide signature may result in submittal package being deemed non-responsive.

D. SUBMITTAL PACKAGES

Each firm submitting a response to this RFQ will do so at its own expense. The District will not be responsible for any costs incurred by firms responding to this RFQ, including costs in

freight to deliver packages. It is up to the respondent to ensure delivery of their response by the due date and time specified in this RFQ. Any submittal package delivered after the date and time specified will be returned unopened to the sender. Firms may withdraw a submittal package, either personally or by written request, at any time prior to the RFQ due date and time.

E. DISTRICT’S RIGHTS

The District reserves the right to accept all or part of any SOQ or to cancel in part or in its entirety this Request for Qualifications. The District reserves the right to accept a SOQ that it considers to be in the best interest of the District and to act as sole judge as to the merit and qualifications of materials or services offered.

F. PROHIBITED ACTIVITY

Firms submitting their SOQ, including, but not limited to, their agents and employees shall not have any contact with any member of the District regarding this RFQ or the services to be provided in connection with this RFQ, other than the person identified above. Said prohibition of contact shall include, but not be limited to, any contact with the Board of Trustees, any of the District's Architects or other Consultants prior to selection and award of a contract under this RFQ, unless such contact is expressly invited in writing from the District. Failure to comply may result in immediate rejection of the SOQ.

G. CONFLICT OF INTEREST

Pursuant to Government Code section 4529.12, District employees are prohibited from participating in the selection process when they have a financial or business relationship with any private entity seeking to enter into a contract with the District, and the District requires compliance with all laws regarding political contributions, conflicts of interest or unlawful activities. Depending on the nature of work performed, the selected firm or firms may be prohibited from performing future work for the District if such work will result in a conflict of interest as prohibited under Government Code section 1090 et seq., and Government Code section 87100 et seq.

H. TIMELINE

<input type="checkbox"/> Final Date for submission of written questions: October 21, 2022.
<input type="checkbox"/> Final Date for District to respond to written questions: November 1, 2022.

<input type="checkbox"/> Submittals: due by 4:00 p.m., November 14, 2022.
<input type="checkbox"/> Finalists notified: November 21, 2022.
<input type="checkbox"/> Interviews: December 7 and/or 8, 2022.
<input type="checkbox"/> Final determination/recommendation for award: December 12, 2022.
<input type="checkbox"/> Contract approved by WJUSD Board of Education: December 15, 2022.

SECTION II. SCOPE OF SERVICES

The District is seeking the services of a Program and Construction Management firm or firms to perform the planning, program management and project/construction management services for the projects the District intends to pursue. Such services are more thoroughly described below. The District reserves the right to modify the scope of work on one or more phases below as required:

Program Management:

- Advise the District on phasing, grouping of projects and other potential cost-saving approaches to construction
- Develop scopes of work
- Assist and advise the District in prioritizing projects and activities
- Verify and update project cost estimates in the Districtwide Facilities Assessment or other projects
- Develop final bond program Implementation Plan
- Develop master project communication plan, incorporating project participants, District administration, site personnel, community, parents and website
- Work with District to develop scope, sequencing, scheduling, budgets and communication for all projects
- Develop and maintain reporting systems for each of those components
- Report to the District on program and project status on a regular basis through the course of the projects
- Advise on and coordinate work of subconsultants
- Participate in planning workshops, attend meetings with site committees and the District Bond Oversight Committee(s)

- Advise on an ongoing basis regarding communications with state and other agencies involved in construction process, including DSA, CDE, OPSC and assist, as requested, with CEQA compliance and applications for state funding
- Work directly with District staff, including the accounting, administration, facilities, maintenance and operations departments to provide continuity in all aspects of the projects

Programming/Design Phase:

- Assist with the detailed definition of project scope, budget and schedule as needed
- Coordinate design consultant activities and delivery schedules as needed
- Review design documents for constructability, scheduling, phasing, clarity, consistency and coordination
- Work closely with and support architect(s) in all related designing and programming tasks
- Perform analysis of the design documents and prepare report(s) with recommendations to the District to maintain established budgets
- Expedite owner's design reviews including modifications
- Assist in the preparation of non-technical portions of project specifications manuals
- Assist with master scheduling where required
- Prepare and/or review existing project cost estimates where required

Preconstruction Phase:

- Assist District with competitive bid process to meet legal requirements, achieve maximum quality & cost benefits
- Coordinate all bid phase activities with District including preparing solicitation notices, conduct pre-bid conferences, project job walks, assist District in evaluating bid results prior to award, review and coordinate bid phase addenda, conduct post-bid conferences as required, coordinate submittals required by governing agencies
- Develop master project schedules detailing commencement and completion of each project, including phases
- Assist District in selection of professional services for inspection, testing, hazardous materials removal, etc.
- Verify and update cost estimates in the Districtwide Facilities Assessment for Construction and provide feedback on scope, advise the District on phasing, grouping of projects, and other cost saving methods

Construction/Close-Out Phase:

- Manage and administer related contracts as required to facilitate the work of the contractors

- Conduct pre-construction conferences as needed as well as pre-construction and construction progress meetings, prepare and distribute the construction progress meeting minutes
- Review and process Request for Information (RFI), shop drawings, samples and other submittals
- Coordinate project site meetings
- Review construction progress and prepare reports for District
- Coordinate change order control process and review and analyze proposed change orders and make, in cooperation with the architect, recommendations to District to determine cost and schedule effects of change orders and prepare change order reports
- Coordinate and evaluate contractor's recovery schedules
- Assist and support architect construction administration processes
- Verify permits, approvals, bonds and insurances
- Verify schedule of values
- Provide continuous on-site construction management personnel if required by the District
- Regularly monitor the construction budgets and schedules and make recommendations to the District
- Review and recommend, in conjunction with the architect(s), any necessary or desirable changes to any contract documents and submit same to District
- Review and approve contractor's certificates for payment in conjunction with the architect and inspector
- Monitor contractor safety programs
- Regularly submit progress reports to District
- Maintain the file set of contract drawings, specifications, addenda, contracts, change orders, shop drawings/submittals, correspondence and other records
- Coordinate the preparation of the punch-list
- Coordinate and determine final completion and payment as well as release of retention and the authorization of final payments and retention
- Coordinate delivery of maintenance and operations manuals and training
- Coordinate with DSA inspector and ensure compliance with all DSA reporting and close-out requirements
- Coordinate DSA close-out, including punch lists and Notices of Completion
- Obtain occupancy permits (where required), coordinate final testing, documentation and regulatory inspections
- Prepare final accounting reports and occupancy plan reports

SECTION III. CONTENTS OF STATEMENT OF QUALIFICATIONS AND PROPOSAL

A. GENERAL

Statements of Qualifications and Proposals are to be limited to twenty (20) pages; printed single-sided, on 8-1/2" x 11" paper, using an 11-point font size or larger. Page limit does not include cover page, cover letter, table of contents, or tabs/dividers. Marketing or brochures are not to be included. All materials submitted to the District in response to this RFQ shall remain the property of the District.

B. COVER LETTER

The cover letter shall be limited to one (1) page. Cover letter must be signed by a representative who is authorized to bind the firm under contract. Include the name, address, telephone number, and *email address* of primary and secondary contact persons. If submitting as a team with another firm or entity, indicate the type of relationship that exists (joint venture, in association, etc.) and which firm is the prime consultant.

C. TABLE OF CONTENTS

Include complete and clear listings of headings, sections and page numbers to allow for easy reference to key information.

D. DESCRIPTION OF FIRM

Firms shall provide information regarding the size, location, nature of work performed, years in business and approach that will be used to meet the District's needs. If the proposal includes a joint venture, for each firm identify the legal form, ownership, and senior official(s) of each company(s).

E. PROJECT TEAM

Provide a team list with resumes of individuals that would be assigned to the District for each phase of work and/or type of project. Include at least the overall Project Director, and Program Manager(s). Include any experience the individuals may have in working with K-12 districts as well as with local and State agencies.

F. FIRM EXPERIENCE

Describe experience your firm has in assisting K-12 school districts in California in providing program, planning and construction services as outlined in this RFQ. Identify at least five (5) K-12 school projects performed by your firm(s) in the past 5 years, including:

- Name of project and district;
- Contact person and telephone number at district;
- Team person in charge of each project; and

Dollar value of each project.

G. REFERENCES

Provide at least five (5) references of California school districts in which you have provided services as described in this RFQ. Provide the district's point of contact, including a valid email address of that contact. A description of each project you reference should be included as well as the size of the district, total project cost and type(s) of services you provided.

H. METHODOLOGY AND TECHNICAL CAPABILITIES

Demonstrate your firm's/team's abilities as it relates to scheduling, budgeting, cost estimating, design and programming phase support, value engineering and constructability reviews, quality control procedures, document control, project close-out and public information web sites used by your firm in working with K-12 school districts.

I. LITIGATION HISTORY

List all litigation arising from any K-12 school project on which your firm(s) provided program or project/construction management services in the past 5 years. State the issues in litigation, the status of litigation, names of parties, and outcome.

J. FEES/COMPENSATION

Understanding that fees may depend on negotiations on specific project details and scopes of work, describe your process of determining a fee or proposal cost for each phase of work described in this RFQ. This section can include a fixed fee for each phase or a list of hourly rates for each member of the assigned team or a percentage based on total construction cost.

K. OTHER

Firms are encouraged to provide any additional information about its resources or abilities that are pertinent to the types of services requested in this RFQ.

SECTION IV. SELECTION PROCESS

A. SELECTION CRITERIA

The firm(s) awarded the services will be selected based on qualifications and demonstrated competence that include relevant experience with public agencies, including local agencies, and a proven track record of success for these types of services.

A “best value” method of selection will be utilized in awarding the services.

The “best value” method evaluates the selection criteria listed below based on the designated relative weight given to each criterion as a percentage of the RFQ’s total points possible, where Cost/Pricing Methodology is given the greatest weight.

Selection Criteria	Relative Weight (%)
Cost/Pricing Methodology	20
Proposed Services	25
Technical Expertise	15
Team Experience	15
Recent Success with Similar Services	10
Proximity of Offices and Availability of Qualified Staff	5
Overall Response to the RFQ/P	5
Other Qualifications	5

Information contained in the SOQ’s will be evaluated and verified. False, incomplete or unresponsive statements may be sufficient cause for non-consideration and/or rejection. The District and Board reserve the right to solely determine whether an SOQ satisfies the requirements set forth within this RFQ; to waive any irregularities in any SOQ; and/or to reject any or all SOQs. The District reserves the right to request additional information from any or all of the proposing firms; to select, in its sole discretion, the firm or firms that best meets the needs of the District and to initiate contract negotiations with that/those firms. In the event that such negotiations are determined, at the District’s sole discretion, to be unsuccessful, the District shall have the right to terminate negotiations and enter negotiations with another shortlisted firm.

B. SELECTION OF FINALISTS

Based on the review by its selection committee, the District will select a group of finalists for further overall evaluation as described below. The criteria for selecting finalists may include, without limitation:

- Experience and performance history of the firm with similar programs;
- Experience and results of proposed personnel;
- References from clients contacted by the District;

Technical capabilities and track record of their use; and
Other criteria of the “best value” method, as described above.

C. INTERVIEWS

The finalists who elect to pursue the work with the District will be invited to meet with the District’s selection committee. The key proposed project staff will be expected to attend the interview. The interview will start with an opportunity for the firm to present its proposal and its project team. The interview will be an opportunity for the District selection committee to review the proposal, the firm’s history, and other matters the committee deems relevant to selecting the firm. The committee may inquire as to the firm’s suggested approaches to projects in general and any issues identified in this Request for Qualifications.

The District may perform investigations of proposing firms that extends beyond contacting the districts identified in the proposals. Following the interviews, the selection committee will make recommendations to District staff and the Board regarding the candidates and awarding the contract. The criteria for these recommendations will include those identified above, as well as cost considerations based on the fee proposals.

D. FINAL DETERMINATION AND AWARD

The District reserves the right to contract with any entity responding to this Request for Qualifications for all or portions of the above-described phases, to reject any proposal as non-responsive, and not to contract with any firm for the services described herein. The District makes no representation that participation in the Request for Qualifications process will lead to an award of contract or any consideration whatsoever. The District reserves the right to seek proposals from or to contract with any firm not participating in this process. The District shall in no event be responsible for the cost of preparing any proposal in response to this Request for Proposals.

The District may, at its option, determine to award contract(s) for only phases of the work or for only portions of the scopes of work identified herein. In such case, the successful proposing firm will be given the option not to agree to enter into the contract and the District will retain the right to negotiate with any other proposing firm selected as a finalist. If no finalist is willing to enter into a contract for the reduced scope of work the District will retain the right to enter into negotiations with any other firm responding to this Request for Qualifications.