

HILLSBOROUGH CITY SCHOOL DISTRICT
REQUEST FOR QUALIFICATIONS (“RFQ”)
PROGRAM / PROJECT MANAGEMENT SERVICES

July 21, 2022

The Hillsborough City School District (“District”) is seeking Statements of Qualifications (“Responses”) from interested Program Management Firms, partnerships, joint-ventures, corporations, or associations (“Firms”), to provide Program / Project Management services to the District. The District’s Board of Education authorized a \$140 million ballot measure which the voters approved in the June 2022 election.

Interested Firms are requested to notify the District of their interest in submitting on this RFQ and invited to submit their Responses, in accordance with this RFQ to:

ANTOINETTE HENSON, E.A. to SUPT.
Hillsborough City School District
300 El Cerrito Avenue
Hillsborough, California 94010
Phone: (650) 342-5193
Email: ahenson@hcsdk8.org

Questions regarding this RFQ are to be directed to Antoinette Henson at the above address. There is no need to visit the sites or request copies of prepared documents. Questions related to this RFQ will not be accepted unless they are submitted in writing by letter, email, or fax, and are received by 3:00PM on Wednesday, August 3, 2022. Answers to all questions will be distributed via email to all Firms expressing an interest in submitting on this RFQ on Friday, August 5, 2022.

All responses to this RFQ must be received by 4:00 PM on Wednesday, August 10, 2022 at the address shown above. The submittal package should be no more than 30 pages (excluding cover letter, table of contents, appendices, dividers, and general brochures which may be submitted in addition to the page limit). A submittal must include one (1) unbound copy, four (4) bound copies, and one (1) copy on a USB flash drive. Respondents may review a list of the District’s proposed bond projects by going to the following online: Hillsborough City School District, California, Measure H.

The District intends to use the responses to this RFQ to assist in the possible selection of one or more Firms for the District’s potential construction projects. The District will evaluate each Firm based on the information set forth in the Responses submitted, together with other information available to the District from any other sources. The District will, at its own discretion, select one or more firms after receipt of the Responses; the District also reserves the right to not select any Firm. The District may also request that one or more Firms participate in an interview process or the District may implement a combination of these and/or other methods for selection.

This RFQ is solely a solicitation for responses. Neither this RFQ, nor any Response to this RFQ shall be deemed or construed to: (i) create any contractual relationship between the District and

any Firm; (ii) create any obligation for the District to enter into a contract with any Firm or other party; or (iii) serve as the basis for a claim of reimbursement for costs associated with the preparation or submittal of any Response.

1. GENERAL INFORMATION

The District intends to select a Firm that best meets the District's needs to perform the Program/Project management services as described in this RFQ. The District may assign all or parts of the work described below to one or more of the successful Firms and/or proceed with District staff augmentation and/or full service Program/Project Management. The criteria on which the District makes its determination will be based on proven ability and experience as described herein, and on the District's needs. (Note that this RFQ may use the term "Firm" to include individuals and may use a singular in place of a plural.)

The Firm selected as a result of this process ("Program/Project Manager") shall be responsible for the following general categories of work as determined by the District.

Program Management: Work with the District's Architect, and Financial Consultant to create budgets, and cost estimates; assist District staff with Program/Project schedule timelines, program planning, phasing, grouping of projects, and other cost-saving methods that match the program cash flow projections; assist the District with bidding and the development of a local community subcontractor outreach program; advise the District on project delivery options; define Program processes and procedures; develop and maintain Program Document, Budgeting, Cost, and Schedule Control Systems; assist with the submittal of documents and reports to the State for project funding applications, DSA procedures, and OPSC project audits/close out; report on Program and individual project status to the District and the Community Oversight Committee on a regular basis.

Project Management: Assist the District in the management and oversight of approved projects during the design and construction phases within scope, schedule, and budget expectations for all projects assigned.

The phasing and scoping of each project will be determined in the Master Plan translation into a Program Implementation Plan process with the involvement of the selected Firm. The Program/Project management Firm must demonstrate the ability and be prepared to work side-by-side with District staff and build a rapport with District staff.

The selected Firm will not perform any design, inspections, or construction work as a general contractor or subcontractor, and shall not be allowed to self-perform any trade work, nor contract with affiliates to perform such work.

It is vital that the selected Firm have the ability to work cooperatively and effectively with the Board, the Superintendent, District staff, the various school site planning committees, and the community. The District places great emphasis on facilitation and communication with all of these stakeholders. The Firm retained by the District will be part of the District team and will be expected to operate in a team environment. The Firm will work under the direction of the Director of Maintenance or a District Designee.

A specific list of anticipated duties is contained in Exhibit A

2. REQUIRED INFORMATION IN PROPOSAL

All materials submitted to the District in response to this RFQ shall remain the property of the District. Extensive experience with the Office of Public School Construction ("OPSC"), CDE, DSA, Uniform Building Code ("UBC"), and Title 24 of the California Code of Regulations is mandatory. Responses should be typewritten, concise, straightforward, and must address each requirement and question. The cover letter shall be signed by the individual authorized to bind the respondent to all statements and representations made therein and to represent the authenticity of the information presented.

2.1 FIRM INFORMATION

Provide a brief history of your Firm. Identify legal form, ownership, and senior officials of company.

Describe number of years in business and types of business conducted. Identify proportion of program management of overall business, and the proportion of K-12 public school projects in overall business.

List all litigation arising from any K-12 public school programs on which your Firm provided program/project management and/or construction management services in the past five (5) years and were named as party/parties. Please include the following information for each litigation:

- State the issues in litigation, court information and docket number
- Names of parties
- Status/Outcome

2.2 EXPERIENCE

Describe your experience with California public education construction programs and relevant public school modernization and new construction projects. Include the scope of programs, description of services provided, and size of program budgets. The District may utilize the lease-leaseback approach to some or all of these projects. Please provide information regarding your Firms experience with such a delivery method. For each program referenced, provide to District the name of Key Contact Person and Telephone Number.

2.3 PROPOSED STAFFING

The selected Firm shall employ, at its expense, professionals properly skilled in the execution of the functions required for the Program/Project management of the Program. The proposed Team is required to have a licensed Architect in the State of California and a LEED Accredited professional as part their Key Personnel. All services are to be performed under the direction and control of a professional licensed by the State of California to the extent required by law. Provide a proposed organizational chart integrating District staff and identify key personnel you would assign to the District's Program and their roles including any sub-consultants anticipated. Key personnel will be contractually required to remain assigned to the District's projects unless said personnel cease to be employed by your Firm, or other arrangements are made with the District. For each identified individual, please provided a resume and describe/summarize his or her experience with public school programs.

2.4 PROPOSED METHODOLOGY AND CAPABILITIES

1. Describe the Firm's technical capabilities and experience with:
 - A. Program planning
 - B. Condition Assessments
 - C. Scheduling
 - D. Budgeting
 - E. Cost estimating
 - F. Cost tracking
 - G. Document control
 - H. Production of data for public information websites, and C.O.C reporting.
 - I. Detail the Firm's budgeting software and if District staff has the ability to inherit and maintain the system once established.
2. Describe the Firm's experience with State and other agencies involved in the planning process for K-12 public school projects.
3. Describe the Firm's quality control systems, including ability to monitor consultants.
4. Describe the Firm's approach to and experience with:
 - A. Sustainability, including Energy Management/Conservation and "Green Buildings"
 - o Describe the Firms experience in reviewing designs for the Collaborative High Performance Schools Standards while ensuring future maintenance savings for the District.
 - B. Implementation Plans
 - C. Value Engineering
 - D. New Construction
 - E. Modernization
 - F. Modular Construction
 - G. Facility Master Planning
 - H. Integrated Project Delivery & Lean Construction Principles (IPD/Lean)
 - I. Facility Design Standards and Master Specifications
 - J. Technology Integration, Planning and Implementation
 - o Describe the Firms experience in data, public address systems, communication systems, and other low voltage systems used in schools.
5. Describe the Firm's capabilities in each area:
 - A. Evaluating/reporting on program status to District staff, Board, and the public.
 - B. Experience in decision-making related to public school new construction and modernization projects specifically for smaller districts/projects.

2.5 GOVERNMENTAL AGENCY EXPERIENCE

Respondent will be required to assist the District in working with various outside governmental agencies, in particular, the State Department of Education, the Division of the State Architect, and the Office of Public School Construction. Respondent shall describe its experience with each of these agencies.

2.6 SCHEDULING ABILITY

Discuss the Firm's ability to prepare and prioritize schedules for school construction Programs. Confirm the availability of the Firm to prepare and prioritize schedule services with the designated team.

2.7 CLIENT REFERENCES

Please provide at least five(5) recent (past five years) clients for whom your Firm has provided full service Program / Project Management work similar to what is being requested in this RFQ. Please include the name of the school district, name of person to contact, telephone number, and identify the project.

2.8 FIRM RATE SHEET

Provide Firm rate sheet for the work described in this RFQ. The District reserves the right to negotiate fees, services, terms, and form of agreement with the selected Firm. List applicable staffing rates and other anticipated costs and conditions.

3. DISTRICT'S EVALUATION PROCESS

3.1 SCHEDULE

3.1.1 Cutoff date for emailed questions:	August 3, 2022
3.1.2 All questions answered by email:	August 5, 2022
3.1.3 RFQ submittals DUE by 4:00PM:	August 10, 2022
3.1.4 Finalists notified on:	August 15, 2022
3.1.5 Interviews (if any) start the week of:	August 18-23, 2022
3.1.6 Board action to award:	September 14, 2022

3.2 SELECTION CRITERIA AND PROCEDURE

The Proposals will be evaluated based on each Firm's qualifications, approach, methodology, and relevant experience with similar school districts and facility programs. The District will also evaluate the Firms based on their performance history, proposed team members assigned, knowledge of the various issues, technical capabilities, proposed fee approach, and overall responsiveness to this proposal. The following factors are important for further consideration and evaluation:

1. Technical Competence

Experience, training, and proven expertise are required in the area of work covered by the scope of work for the construction project(s) and the competence of key personnel core leaders.

2. Staffing-Capabilities

The capability under current workloads to perform the work within the desired time frame may be considered. The size and availability of qualified staff may be considered for this item.

3. Project Approach Planning and Scheduling Ability

Items that may be considered here are work methodology, management structure, and any other indications of processes that would improve planning and reduce the impact of unexpected project delays.

4. Past Performance Record

Past performance is evaluated for providing quality projects in an efficient, timely manner. The quality of the work could be an indication of exercising good judgment in foreseeing future problems. Records may be checked by having conversations with prior clients. The consultant's past experience on projects of a similar nature is important.

5. Quality Control/Assurance

The consultant's process shall monitor and advise the District regarding the contractor's compliance with the design plans and special provisions, District standard specifications, as well as DSA, OPSC, and CDE requirements and inspections. Consultant should have experience in performing constructability reviews at various stages of design.

6. Cost Control and Reporting

The company's overall operation should encourage employees to implement cost effective construction services and construction methods. Emphasis should be on cost control, cost tracking, effective management, clear communications with staff, and completion of all work within budget.

7. Experience with DSA, OPSC and CDE

Exemplify familiarity and experience with DSA, OPSC, and CDE in terms of funding, reporting, and project closeout. Experience and knowledge of requirements for the State Labor compliance Program.

3.2 INTERVIEWS

The District may invite short listed Firms to meet with the District's panel selection committee, at the District's option. The interview will start with an opportunity for the Firm to present its proposal and its project team. The balance of the interview will be an opportunity for the District selection committee to review the proposal, the individual and/or 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 the Program and the issues identified in this Request for Qualifications.

The District may provide a form of agreement to finalists before the interview. Any comments or objections to that form of agreement shall be provided in writing before the interview, and may be the subject of inquiry at the interview.

The District may perform investigations of proposing Firms that extend beyond contacting the clients identified in the Responses. Following the interviews, the selection committee will make recommendations to District staff and the Board regarding the candidates and awarding the contract.

3.3 FINAL DETERMINATION AND AWARD

The District reserves the right to contract with Firm(s) responding to this Request for Qualifications for all or portions of the described scope of work, 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 shall in no event be responsible for the cost of preparing any proposal in response to this RFQ.

The awarding of a contract is at the sole discretion of the District. The District expects to award a contract(s) for the services identified in this Request for Qualifications at the Board meeting of September 14, 2022.

The District may, at its option, determine to award a contract(s) 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 RFQ.

EXHIBIT A

Detailed Scope of Anticipated Services

1. PROGRAM MANAGEMENT

1.1. Program Management Tasks

- 1.1.1. Implementation Plan. Together with the District Architect and Financial Consultant the Program/Project Manager shall assist the District in refining and carrying out the District's Facilities Master Plan and construction plans for the Program to achieve the District's goals.
- 1.1.2. Program Management Plan. Program/Project Manager shall assist District in the preparation of a Program Management Plan, including defining processes, procedures, and responsibility/authority matrices. Project Manager shall also establish procedures for coordination among the District, Program/Project Manager, Architect/Engineers, Local/State Governmental Agencies, Inspectors, and Contractors with respect to all aspects of the Program and implement such procedures.
- 1.1.3. Master Schedule. Program/Project Manager shall refine, maintain, and update, as necessary, the Master Schedule for the overall Program and develop a Project Schedule for each Project in the design phase that coordinates and integrates the pre-design activities, Architect/Engineer's design efforts and the District's activities with construction schedules. Program/Project Manager shall update the overall Master Schedule and each Project Schedule incorporating a milestone schedule for all activities, including realistic activity sequences and durations. Program/Project Manager shall also include the District's occupancy, and temporary accommodations, requirements showing portions of the Project having occupancy priority. Program/Project Manager shall provide District with copies of the most recent Master Schedule.
- 1.1.4. Master Budget. In conformance with the Program potential cash flow the Program/Project Manager shall develop and refine the Master Budget for the entire Program including all construction costs, consultants' fees, District's costs, contingencies and reserves, and update as required for the District's approval. The Program/Project Manager shall develop Project Budgets within the overall Program Master Budget. In conjunction with the Master Budget updates, Program/Project Manager shall develop cash flow/funding status and requirements' projections for the District as required.

- 1.1.5. Cost Control. Program/Project Manager shall develop and monitor an effective system of Program cost control and revise and refine the initially approved Program Budget and Project Budgets, incorporate exposures, pending changes and approved changes as they occur, and develop cash flow reports and forecasts as needed. Program/Project Manager shall also identify variances between actual and budgeted or estimated costs and advise the District and Architect/Engineer or other appropriate Consultant whenever projected cost exceeds budgets or estimates.
- 1.1.6. Contract Administration. Program/Project Manager shall develop and implement written contract administration procedures including the development of written procedures for the review, approval, processing and payment of applications by Contractors, Architect/Engineers, and other consultants/service providers for progress and final payments.
- 1.1.7. Status Reporting and Communications Management. Program/Project Manager shall develop and implement a status reporting system including regularly scheduled meetings and reports as required by the District. Program/Project Manager shall make presentations and appearances before boards, commissions, oversight committees, and other public bodies with the District to discuss details, to comment, to recommend, to give progress reports and to obtain approvals. Program/Project Manager shall also assist the District as requested in developing a Program communications management plan, and provide assistance with developing communication media and implementing the plan.
- 1.1.8. Procurement Planning. Program/Project Manager shall assist the District in developing a written procurement management plan to include delivery method selection and source selection parameters and criteria.
- 1.1.9. Risk Management. Program/Project Manager shall assist the District with developing a risk assessment and management plan for examining market conditions and history of similar projects, identifying ways to improve processes to reduce risks, and establishing contingency plans and steps to take to mitigate risks. Program/Project Manager shall, further, assist District with evaluation of District provided self-insurance for construction activities.
- 1.1.10. Contracts. Program/Project Manager shall review the District's existing standard Consultant agreements and construction contracts and advise District and District's legal counsel of any desired or recommended changes.
- 1.1.11. Quality Control/Quality Assurance. Program/Project Manager shall develop written procedures and systems for quality control and performance guidelines for Architect/Engineers, Inspectors and Contractors.
- 1.1.12. Other Program Management Tasks. Program/Project Manager shall be responsible for performing other appropriate program coordination tasks as requested by District.

2. PROJECT MANAGEMENT

2.1. Predesign Phase.

- 2.1.1. Permits/Approvals. Program/Project Manager shall determine with the District's input all governmental permits and approvals necessary for the Project and represent the District in pursuing such permits and approvals and assist the Architect/Engineer in preparing and filing applications and filing for all necessary permits required on behalf of the District.
- 2.1.2. Standardized Design Tools. Program/Project Manager shall be responsible for assisting the District and District's Architect/Engineers in developing District Design Standards and Guidelines without, however, assuming any of the Architect/Engineers' responsibilities for design.
- 2.1.3. Consultant Selection. Program/Project Manager shall prepare written guidelines for selecting Consultants, subject to approval of District's legal counsel. Program/Project Manager shall also solicit proposals from and assist the District in negotiating with, selecting and commissioning Consultants.
- 2.1.4. Joint Use. Program/Project Manager shall also assist the District and the District's legal counsel in exploring facilities/real property joint-use agreements as may be appropriate for achieving Program goals.

2.2. Design Phase.

- 2.2.1. Consultation During Project Development. Program/Project Manager shall schedule and attend regular meetings with the Architect/Engineer during the development of conceptual and preliminary design to advise on site use and improvements, selection of materials, building systems and equipment. Program/Project Manager shall also provide recommendations on construction feasibility, availability of materials and labor, time requirements for installation and construction, factors related to cost including costs of alternative designs or materials, preliminary budgets, and possible economics including life cycle costing and conduct formal value engineering sessions when requested by District. Program/Project Manager shall assist in and supervise the identification and assessment of environmental concerns posed by Projects.
- 2.2.2. Design Reviews. Program/Project Manager shall be responsible for coordinating and documenting design review meetings with school site personnel, community members and other District personnel. Program/Project Manager shall also be responsible for assisting the District in the review of various design schemes submitted by Consultants.
- 2.2.3. Scheduling. Program/Project Manager shall develop design written schedules and milestones and monitor and update status and progress.

2.2.4. Estimating. Program/Project Manager shall evaluate the cost estimate prepared by Architect at the end of the schematic design phase of each Project for approval by the District as part of the Program Budget. Program/Project Manager shall also be responsible for evaluating each estimate for District's approval as the development of the Drawings and Specifications proceeds at the end of Design Development and Construction Documents Phases, and advise the District and the Architect/Engineer, or other appropriate Consultant, if it appears that the Project Budget will not be met and make recommendations for corrective action.

2.2.5. Coordination of Contract Documents. Program/Project Manager shall review the Drawings and Specifications for each Project as they are being prepared, recommending alternative solutions whenever design details affect construction feasibility or schedules, without, however, assuming any of the Architect/Engineers' responsibilities for design.

2.2.6. Construction Planning.

2.2.6.1. Program/Project Manager shall be responsible for reviewing the Drawings and Specifications with the Architect/Engineer to eliminate areas of conflict and overlapping in the Work to be performed by the various Contractors.

2.2.6.2. Program/Project Manager shall recommend for purchase by the District long-lead items to ensure their delivery by the required dates.

2.2.6.3. Program/Project Manager shall be responsible for assisting the District in the coordination of the work of hazard abatement Consultants and Contractors with the Projects in the Program. It is expressly understood that Program/Project Manager is not an expert in hazard abatement and does not insure the adequacy or effectiveness of hazard abatement Consultants' or Contractors' plans, work or safety programs.

2.3. Pre-Bid Activities (if required).

2.3.1. Local Business Outreach. Program/Project Manager shall develop and implement an aggressive Contractor and Supplier marketing program to generate interest in the Program's projects, including but not limited to generating interest with Disadvantaged Veterans Business Enterprises, when required by law.

2.4. Bid & Award Phase (if required).

2.4.1. Bidding. Program/Project Manager shall receive and order the printing of plans and specifications for distribution and bidding, and utilize the District's construction contract documents. Program/Project Manager shall assist the District and District's legal counsel in the preparation and placement of legal notices and advertisement for bidding. Further, Program/Project Manager shall be responsible for assisting the District and Consultants in the development of additive and deductive alternates,

as well as coordinating the issuance of addenda and conduct of pre-bid conferences and site visits.

2.4.2. Award. Program/Project Manager shall assist the District in tabulating and evaluating bids and bid alternates, in accordance with the provisions of the California Public Contract Code. Program/Project Manager shall be responsible for monitoring District preparation and Contractor execution of contracts for timely completion of contracts, as well as monitoring and expediting contractor and/or subcontractor contractual submittals to ensure completeness prior to forwarding to District for final review and processing.

2.5. Construction Phase.

2.5.1. Program Control.

2.5.1.1. Program/Project Manager shall monitor the Work of the Contractors and coordinate the Work with the activities and responsibilities of the District, Architect/Engineers, and Inspectors to complete each Project in accordance with the District's objectives of scope, cost, time and quality.

2.5.1.2. Program/Project Manager shall schedule and conduct progress meetings at which Contractors, District, Architect/Engineers, Inspectors and Program/Project Manager can discuss jointly such matters as procedures, progress problems and scheduling. Program/Project Manager shall also schedule and conduct such meetings at the request of the District.

2.5.1.3. Program/Project Manager shall be responsible for regularly monitoring the Project Schedule as construction progresses, which includes identifying potential variances between scheduled and probable completion dates, and reviewing the schedule for work not started or incomplete and recommend to the District, Architects/Engineers and Contractors adjustments in the schedule to meet the probable completion date. Program/Project Manager shall also provide the District with summary reports of each monitoring and document all significant changes in schedule.

2.5.2. Cost Control.

2.5.2.1. Program/Project Manager shall identify variances between actual and budgeted or estimated construction costs and advise the District and Architect/Engineer or other appropriate Consultant whenever projected cost exceeds budgets or estimates.

2.5.2.2. Program/Project Manager shall also maintain procurement and cost accounting records on authorized work performed for projects under force account, actual costs for labor and materials, informal contract, or other basis requiring such records.

- 2.5.3. District's Consultants. As required, Program/Project Manager shall assist the District in selecting and retaining professional services of a surveyor, testing laboratories and special consultants, and coordinate these services.