



SADDLEBACK VALLEY UNIFIED SCHOOL DISTRICT

REQUEST FOR QUALIFICATIONS RFQ #24-05 CEQA/NEPA Consulting Services

The Saddleback Valley Unified School District (“**District**”) is requesting submission of statements of qualifications (“**SOQ**”) from qualified firms, partnerships, corporations, associations, persons, or professional organizations (“**Firm**”) to provide consulting services to meet the California Environmental Quality Act (CEQA) and the National Environmental Policy Act (NEPA) requirements for projects within the District’s Facilities Master Plan, plus other projects or services as directed by the District. If you are interested in providing a Statement of Qualification for CEQA/NEPA Consulting Services, please submit a detailed statement using this Request for Qualifications (“**RFQ**”). The District will review all submittals to determine their ability to meet district requirements and provide the highest quality services.

DISTRICT OVERVIEW

Saddleback Valley Unified School District is located in southern Orange County, California and serves the communities of Aliso Viejo, Irvine, Laguna Hills, Laguna Woods, Lake Forest, Mission Viejo, Rancho Santa Margarita and unincorporated Orange County. The District provides a highly regarded educational program to approximately 24,000 students in 35 schools from its attendance area that encompasses over 95 square miles.

This request is not a formal request for bids or an offer by the District to contract with any firm responding to this RFQ. The District intends to choose multiple firms that respond to this RFQ to include in its pool of qualified firms. Inclusion in this pool and any contract award will be subject to the District’s Board approval.

Firms that intend to submit an SOQ must maintain a full-service office within one-hundred (100) miles of the District.

Interested Firms are invited to submit an SOQ as described below, with one (1) electronic copy in PDF format and three (3) paper copies in a sealed envelope prominently marked: Request for Qualifications, title, the due date and time, and the name of the organization submitting the statement, to:

Saddleback Valley Unified School District
Reception
Attn: Julie Tsang, Assistant Director of FPD&C
25631 Peter A. Hartman Way
Mission Viejo, CA 92691

Questions regarding this RFQ must be in writing and submitted by October 3, 2024 directed to Julie Tsang at Tsangh@svusd.org. **All SOQs must be received by 12:00 p.m. on Friday, October 18, 2024.**

Thank you for your interest in working with the Saddleback Valley Unified School District.

Advertisement dates: 9/16 & 9/23

GENERAL INFORMATION

The District invites qualified Firms to submit an SOQ related to its ability to provide the services, as more fully indicated herein. Firms must have extensive experience with CEQA/NEPA compliance documents for school projects, Title 24 of the California Code of Regulations, California Department of Education (CDE), and the Department of Toxic Substance Control (DTSC). Firms must have extensive experience (minimum of 5 years) working on public school facilities projects.

1. Scope of Services

The District is seeking the services of firms to provide CEQA/NEPA Consulting Services. The District is looking to utilize a variety of services which may include environmental services such as, but is not limited to preparing various reports, and understanding all applicable CDE guidelines relative to school site selection and approval. The scope of such services could include, but are not limited to:

- 1.1 Preparation of all CEQA documentation according to all applicable State and local requirements, including all notices (Notice of Determination, Notice of Completion, etc.), Initial Study (IS), Categorical Exemption (CE), Negative Declaration (ND), Mitigated Negative Declaration (MND), or Environmental Impact Report (EIR), as determined by the IS, as well as the Responses to Comments, Mitigation Monitoring Reporting Program (MMRP), and Findings;
- 1.2 Coordination and supervision of sub-consultant specialists as required for this project, including but not limited to biological resources, cultural resources, and hazard assessments. The District may also choose to retain its own consultants for technical studies such as traffic and cultural studies.
- 1.3 Coordination of meetings, CEQA presentations, and consultation with the public in scoping meetings and public hearings;
- 1.4 Collaboration and coordination with District staff and various consultants, as well as state and local agencies as required;
- 1.5 Provision of advice to District staff and consultants on CEQA procedures, requirements and substantive issues, including the public noticing process, filings with state and local agencies, and the feasibility of specific mitigation measures; Attendance at various District and public meetings, as required.
- 1.6 Appropriate review of alternative projects and sites.
- 1.7 Review and collect documents for proposed development(s) within the District proposed by other entities, including within the communities and cities of Aliso Viejo, Irvine, Laguna Hills, Laguna Woods, Lake Forest, Mission Viejo, Rancho Santa Margarita and unincorporated Orange County to determine if further environmental investigations are needed by the District. Such documentation may include items such as: Notices of Public Hearings, Notices of Preparation, Negative and Mitigated Negative Declarations, Environment Impact Reports, Initial Studies, and/or other related studies, etc.
- 1.8 Monitor progress of proposed development projects within the above noted cities, which may affect the District, school sites and future school site development.

- 1.9 Coordinate, communicate and work effectively with the District’s Facilities Development and Planning Branch regarding development and environmental conditions associated with various development projects, which may impact the District and necessitate additional investigation and/or action by the District.
- 1.10 Your office shall be prepared and may be requested to perform work by the District for:
- i. obtaining all permits and approvals required to carry out the work, and
 - ii. coordinating all of its activities with the relevant property owners and their tenants and neighbors, the District, the CDE, and all other entities having jurisdiction or likely to be affected by your consulting activities.
- 1.11 If needed and at the request of the District, it may be determined that specific CEQA/NEPA projects will be authorized by separate work orders as required. In the future, you may be requested by the District to submit a work task proposal (a “Proposal”) for additional and/or further particular projects. Each Proposal shall describe the Consultant’s experience and expertise with respect to the services, if any that are unique to the property or project that is the subject of the Proposal. In addition, the Proposal shall set forth a detailed scope of services, a completion schedule, a schedule of professionals that will be used to supervise and staff the matter, and a not-to-exceed dollar amount for the services to be performed.
- 1.12 Specific scope of work tasks include:
- i. Project Initiation: This task includes meeting with District staff and consultants to discuss project history, project description, specific project issues, and CEQA schedule. District will provide copies of previously completed studies and the project site plan as available. Consultant will prepare the CEQA project description and submit to District staff for review.
 - ii. Administrative Draft Initial Study: The consultant shall prepare an Initial Study Checklist to determine the appropriate CEQA documentation for this Project. The format shall be based on the most current CEQA requirements and checklist per the Office of Planning and Research (OPR).
 - iii. Exemption, ND, MND or EIR: Based on the analysis within the Initial Study, the Consultant shall prepare either a Draft Exemption, Draft ND with or without Mitigation Measures (MND), or Draft EIR.
 - iv. Draft ND, MND or EIR: Once the Draft CEQA document is approved by the District, the Consultant will prepare all notices and distribute copies of the document to the Office of Planning and Research (OPR) and other public agencies per the State CEQA Guidelines. The District will provide the consultant with a certified mailing list, and the consultant will prepare and distribute all Notices of Availability (NOA) and Notice of Intent to Adopt (NOI). The Consultant will provide the District with a list of all mailings for the record.
 - v. Response to Comments and Final MND or EIR: If an MND or EIR is prepared, the Consultant will respond to all comments received during the public review period of the MND or EIR and prepare a Response to Comments document for the Final CEQA document.
 - vi. Mitigation Monitoring and Reporting Program (MMRP): If it is determined through preparation of the Initial Study that an MND is the appropriate CEQA document, the Consultant will prepare an MMRP for inclusion in the Final CEQA document, pursuant to Section 1081.6 of the Public Resources Code.
 - vii. Findings: The Consultant will prepare all necessary CEQA findings for inclusion in the Board of Trustees Resolution for adoption of the CEQA document.

- viii. Noticing: The Consultant will prepare all appropriate and required noticing, which includes but is not limited to: public notices, NOI, NOC and NOD.
- ix. Project Meetings: It is anticipated that the following meetings would occur with implementation of the CEQA scope of work: one (1) project initiation meeting, two (2) progress meetings, and any additional meetings as needed.

2. COMPLIANCE WITH ALL APPLICABLE LAWS AND GUIDELINES

Consultant’s proposal must set forth Consultant’s understanding of all applicable CEQA/NEPA laws and guidelines and all requirements of the District, the California Department of Education and all other governmental agencies with jurisdiction and local ordinances and/or other applicable regulations relative to the Work to be undertaken as well as Consultant’s ability to comply with same and the methodology by which Consultants will do so. Consultant proposal must confirm that the nature of the Work to be performed will meet all the aforementioned requirements for said Work as set by the applicable codes and regulations and all other applicable ordinances and guidelines.

- 3. Firm’s SOQ.** Each Firm’s SOQ must be consecutively numbered on each page and must include the following information, using the following outline structure, except as may be otherwise directed. The Firms’ SOQ shall **be no longer than fifty (50) pages, 8½” x 11” paper**, bounded inclusive of résumés, forms, and pictures, and tabbed according to the numbering system reflected below. Please provide the District with an SOQ that includes the following:

3.1 Content of Statement of Qualifications. Firm’s statements of qualifications must be concise, well organized, and demonstrate Firm’s qualifications, and shall be formatted as outlined below.

Tab 1 Letter of Interest. A dated Letter of Interest must be submitted, including the legal name of the Firm(s), address, telephone, and fax numbers, and the name, title, and signature of the person(s) authorized to submit the SOQ on behalf of the Firm. The Letter of Interest should provide a brief statement of Firm’s experience indicating the unique background and qualities of the Firm, its personnel, and its sub-consultants, and what will make the Firm a good fit for work in the District.

Tab 2 Table of Contents. A table of contents of the material contained in the SOQ should follow the letter of interest.

Tab 3 Executive Summary. The executive summary should contain an outline of Firm’s approach, along with a brief summary of Firm’s qualifications.

Tab 4 Proposed Personnel/Firm Team. Include resumes of key personnel who would be performing Services for the District. Specifically, define the role of each person and outline his or her individual experience and responsibilities. Indicate personnel who will serve as primary contact(s) for the District. Indicate Firm’s and personnel’s availability to provide the Services.

Tab 5 Firm Information - Provide a comprehensive description of the services offered by Firm. The description should include the following:

- Provide a brief history of Firm, and, if a joint venture, of each participating Firm.

Identify legal form, ownership, and senior officials of company(ies). Describe number of years in business and types of business conducted.

- Describe Firm’s philosophy and how Firm intends to work with the District’s administration officials to perform the Services.
- Include resumes of key personnel who would be performing Services for the District. Specifically, define the role of each person and outline his or her individual experience and responsibilities. Indicate personnel who will serve as primary contact(s) for the District. Indicate Firm’s and personnel’s availability to provide the Services.
- Provide a statement of Firm’s financial resources and insurance coverage. Include a certification of correctness or other documentation demonstrating the Firm’s financial resources and stability.
- Provide a statement of **ALL** claim(s) filed against Firm in the past five (5) years. Briefly indicate the nature of the claim and the resolution, if any, of the claim(s).
- Include recent letters of reference or testimonials. Firm should limit letters of references or testimonials to no more than ten (10).
- Indicate ongoing commitment to professional education of staff, total number of permanent employees, and any other data that may assist the District in understanding Firm’s qualifications and expertise.

Tab 6 Prior Relevant Experience.

- Describe your firm’s experience with the various task in the Scope of Work.
- Describe your firm’s approach to quality control / assurance procedures.
- Identify established methods and approaches utilized by your firm to successfully meet completion deadlines, and provide examples demonstrating effective use of stated methods and approaches.
- Provide a list of **ALL** K-12 projects performed by Firm in the past five (5) years. Provide the information described below for the ten (10) **MOST RECENT** projects.
 - Name of project and district,
 - Scope of projects, description of services provided,
 - Contact person and telephone number at district,
 - Firm person in charge of each project,
 - Dollar value of each project,
 - All litigation arising from the project, if any. Provide information related to the issues in the litigation, the status of litigation, names of parties, and the outcome.

Tab 7 Additional Data. Provide additional information about the Firm as it may relate to Firm's SOQ.

Tab 8 Conflicts of Interest. If applicable, provide a statement of any recent, current, or anticipated contractual obligations that relate in any way to similar work, the Project, or the District that may have a potential to conflict with Firm's ability to provide the Services described herein to the District. Firms cannot submit, propose, bid, contract, sub-contract, consult, or have any other economic interests in the Project for which the Firm may provide Services. The Firm selected to provide the Services and any subsidiary, parent, holding company or affiliate of the selected Firm, may not perform any construction work or submit a bid for the Project.

3.2 Compensation.

- **Fee Schedule.** Please also provide a current fee schedule for the types of service(s) that you offer.
- **Additional Costs.** Identify any additional fees, costs, expenses or reimbursable fees for which Firm would be seeking compensation outside the contract fee.

4. District's Evaluation / Selection Process.

4.1 District Investigations. The District may perform investigations of proposing parties that extend beyond contacting the districts identified in a Firm's SOQ.

4.2 Selection of Qualified Firms. Based on its evaluation of SOQs, the District's selection committee will select firms to include in the pool of qualified firms. The criteria for selecting firms may include, without limitation:

- Experience and performance history of the Firm with similar projects;
- Experience and results of actual personnel;
- References from clients contacted by the District;
- Technical capabilities and track record of their use;
- Overall responsiveness of the SOQ.
- Firm's pricing information.

4.3 Final Determination and Award. The District reserves the right to contract with Firms responding to this RFQ, to reject an SOQ as non-responsive, and not to contract with Firms for the services described herein. The District makes no representation that participation in the RFQ process will lead to an award of contract or any consideration whatsoever. The District reserves the right to seek SOQs from or to contract with Firms not participating in this process. The District shall in no event be responsible for the cost of preparing any SOQ in response to this RFQ.

5 Public Records. SOQs will become the property of the District and subject to the California Public Records Act, Government Code sections 6250 et seq. Those elements in each response that are trade secrets as that term is defined in Civil Code section 3426.1(d) or otherwise exempt by law from disclosure and which are prominently marked as "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY" may not be subject to disclosure. The District shall not be liable or responsible for the disclosure of any such records including, without limitation, those so marked if disclosure is deemed to be required by

law or by an order of the Court. A Firm that indiscriminately identifies all or most of its response as exempt from disclosure without justification may be deemed non-responsive. In the event the District is required to defend an action on a Public Records Act request for any of the contents of a response marked “Confidential,” “Proprietary,” or “Trade Secret,” the Firm agrees, by submission of its SOQ for the District’s consideration, to defend and indemnify the District from all costs and expenses, including attorneys’ fees, in any action or liability arising under the Public Records Act.