



REQUEST FOR QUALIFICATIONS RFQ #24-06 Geotechnical Services and Material Testing & Inspection Services

A **Request for Qualifications (RFQ)** is being issued by the Saddleback Valley Unified School District (“District”) to identify firms to provide Geotechnical Services and Materials Testing and Inspection Services in accordance with the requirements expressed in this document and in compliance with all applicable local, state, and federal codes and regulations for the District’s upcoming projects.

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 on a list of qualified firms for future projects. Inclusion on this list and any future award of a contract will be subject to the District’s Board approval.

Firms that intend to submit a Statement of Qualifications (SOQ) must be an insured, licensed, and 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

I. SCOPE OF SERVICES (Qualifications for inclusion on vendor list for future projects)

Firm must be able to meet and provide the insurance coverage as defined in the District Independent Consultant Agreement. Services cannot commence on any future work until certificates of insurance are approved and on file with the District. For this RFQ please just provide a statement that your firm has the required insurance.

The **Scope of Services** for Geotechnical Investigation Services will generally include, but is not limited to:

A. Geotechnical Services:

- 1.** Perform geotechnical foundation investigations to assist the District in the methods of construction which would be customary and necessary for school buildings, structures, and site improvements.
- 2.** Prepare appropriate geotechnical reports to meet the requirement set out by state and local authorities for school construction, to include any DSA special requirements on a project. The report shall comply with the Geotechnical and Geo-hazard investigations as described in Section 1803A of the 2013 CBC for Seismic Design Categories D through F and the current edition of the California Building Code, Chapter 16, Structural Design, Chapter 18, Soils & Foundations; Appendix J, Grading. All exploration is to comply with the CGS, Note 48 Checklist.
- 3.** The following list of minimum criteria are those items which the District would like to see specifically addressed within the report and shall not be construed as limit to the scope of work of the investigation:
 - Reports must adequately describe the site to which it applies and must include all structures to be constructed as part of the project.
 - Reports must specifically address all of the potential hazards and be based on adequate investigation and study of the site.
 - Reports must provide design recommendations for the mitigation of identified geologic hazards.
 - The report must be signed by a California registered geotechnical engineer or California certified engineering geologist.
 - **Site Conditions:**
 - Description of on-site soils, boring locations, and test methodologies utilized in making determinations
 - Provide at least one boring for every 5,000 sq ft of building footprint within the planned footprint of the building
 - Include five (5) additional borings (performed at the same time as aforementioned borings) at a depth of 50' or until refusal at locations identified by the District
 - Foundation design recommendations for the new building(s) including building pad preparation
 - Groundwater Depth
 - Location relative to Flood Hazard Zone
 - Perform and include in the report one (1) percolation test at location provided by the District
 - **Faulting and Seismicity:**
 - Location relative to earthquake fault zones
 - Location relative to seismic hazard zones for landslides

- Location relative to seismic hazard zones for liquefaction
- Location relative to area identified as a geological hazard in the Safety Element of the Local General Plan
- **Soil Evaluation:**
 - Percolation characteristics
 - Collapse potential lab test
 - In situ moisture content and dry density (ASTM D2216 and ASTM D2937)
 - Particle size gradation (ASTM D422)
 - Percent finer than No. 200 Sieve (ASTM D1140)
 - 4 Expansion Indexes (ASTM D4829)
 - Maximum dry density and optimum moisture content (ASTM D1557)
 - Direct shear (ASTM D3080)
 - Consolidation characteristics (ASTM D2435)
 - R-Value (California Test Method 301)
 - Corrosivity suite – sulfate content, chloride content, pH and Resistivity (California Test Methods 417, 422, and 643)
- **Earthwork and Site Grading Recommendations:**
 - Grading
 - Over excavation and compaction
 - Subgrade preparation
 - Structural backfill
 - Buried utilities and trench backfill
 - Suitability of on-site soils for use in trench backfill in lieu of sand bedding
 - Types of imported fill (if required) for use in compacted fills
 - Special recommendations for expansive soils or for proposed site work where expansive soils are present
- **Design Recommendations:**
 - Foundation type and bearing pressures: provide practical and economic considerations, consistent with good engineering requirements
 - Footing recommendations for freestanding shade structure/canopies
 - Recommendations for retaining walls, concrete-pedestrian/vehicular paving, precast concrete pavers, light pole footings
 - Anticipated Traffic Index (TI) for site pavements
 - Pavement recommendations that would include pavement and base thicknesses and also recommended relative compactions for subgrade, base and pavement
 - Subgrade preparation aggregate base depth and compaction for pedestrian and vehicular rated concrete
 - Advise if thickened edges are required
 - Recommended spacing for concrete control joints
 - Site Walls – Specific over ex and sub grade preparation
 - Lateral earth pressures and resistance to Lateral Loads
 - Recommendations for over-excavation, sub-grade modulus, passive and active lateral earth pressure, friction coefficient and related information
 - Cast-in-place concrete/CMU retaining walls, and/or CMU freestanding walls
 - Concrete-pedestrian/vehicular
 - Turf block

- Permeable pavers, and/or Precast concrete pavers
- Light pole footings
- Fence post footings (chain link and tube steel)
- Flagpole
- Bike racks
- Modulus of Subgrade Reaction
- Slabs on grade
- Underground Utility Pipe Design and Construction
- Soil Parameters for Pipeline Design
- Pipe Bedding
- **Asphaltic Concrete and Cement Concrete Pavement Design:**
 - AC recommendations
 - Concrete control joint (expansion and sawcut/score) spacing
 - Automobile access and parking
 - Service trucks
 - Multi-axle vehicles
 - Paved surfaces not used as driveways or parking surfaces
- **Construction Recommendations:**
 - Temporary Excavations
 - Evaluation of construction documents to confirm accuracy and completeness of the interpretations of the report
- **Special**
 - Underpinning
 - Excavation problems related to adjacency to existing structures on adjacent property
 - Sulfate content of soils and probable effect on concrete
 - Corrosion studies and probable effect on metal pipes
 - Foundation drains
 - Earth embankments
 - Temporary and Permanent cut and fill

The **Scope of Services** for Materials Testing and Inspection Services will generally include, but is not limited to:

B. Soils Testing Services:

1. Consultant shall provide laboratory testing and field testing, as required by the DSA-103 Form.
2. Construction Special Inspection – Soils inspection to include, but not limited to, placement of fill, foundation excavation, bottom of excavation/foundation, compaction of fill, cast-in-place deep foundation (piers) drilling, pier dimension and concrete/grout volumes, placement of soil at retaining walls, compaction of soil backfill at retaining walls, and asphalt inspection.
3. Other Services – including asphalt and concrete mix design review, project documentation, technical support, field, laboratory reports, logs and final verified reports and affidavits, as required.
4. Consultant must submit documentation to the DISTRICT of all tests and services provided.
5. Consultant shall perform the following tests and field inspectionservices:

- Soils:
 - Qualification testing of controlled fill material
 - Compaction of controlled fill
 - Building pad preparation
 - Trench and Wall Backfill
 - Subgrade and aggregate base
- Asphaltic Concrete and Concrete Surfaces:
 - AC paving placement
 - Sub-base / base compaction
 - Pre-saturation of subgrade for concrete hardscape
- 6. Consultant shall review the proposed concrete mixes, masonry grout and mortar mixes in laboratory tests for conformance with the specifications.
- 7. Consultant shall perform the following tests and field inspectionservices:
 - Concrete Compression Tests:
 - Concrete Cylinders – **4 Field Samples** (ASTM C29)
 - Concrete Cores (ASTM C39)
 - Lightweight Concrete (ASTM C495)
 - Insulating Concrete (ASTM C332)

C. Materials Testing Services:

Inspection services shall be provided for concrete batch plant and field sampling including, but not limited to, slump, air entertainment, unit weight and yield tests, concrete coring, and proof testing (installed epoxy). Consultant shall transport all samples to the laboratory for compression testing in strict accordance with ASTM requirements and specifically include four (4) cylinders per sample (one 7 day, two 28 day, and 1 hold). Compression test reports shall be distributed to the appropriate parties.

Consultant to perform required reinforcing steel laboratory testing and is to include all costs associated with pick-up, laboratory testing, and report distribution.

Perform all field inspection of masonry installation including, but not limited to, preparation of masonry wall prisms, sampling and placing of all masonry units, placement of reinforcement, inspection of cleanouts, and during all grouting operations.

Note- All associated, direct and indirect costs associated with the travel/room/board of personnel within a fifty (50) mile radius of the project site to the location of the plant/shop to be the responsibility of the selected firm. If the District has approved, then the District will reimburse mileage only at the current federal reimbursement rate for inspection services provided at a plant/shop which is located more than 50 miles and less than 100 miles from the project site – firms are responsible for all other direct and indirect travel costs including, but not limited to, room/board. All costs are to be presented and approved by the District prior to performance of inspection with such travel costs.

1. Consultant shall review the proposed concrete mixes, masonry grout and mortar mixes in its laboratory for conformance with the specifications.
2. Consultant shall perform the following tests and field inspectionservices:
 - Concrete Compression Tests:
 - Concrete Cylinders – **4 Field Samples** (ASTM C29)
 - Concrete Cores (ASTM C39)

- Lightweight Concrete (ASTM C495)
- Insulating Concrete (ASTM C332)
- Concrete Flexural Tests:
 - Flexural Test (ASTM C293/C78)
- Steel Reinforcing Laboratory Tests:
 - Tensile (ASTM A615)
 - Bend (ASTM A615)
 - Steel Tagging, Pick-up & Delivery
- Masonry Compression Tests:
 - Mortar (UBC 21 - 16)
 - Grout (UBC 21 - 18/ASTM C1019)
 - Masonry Prism (ASTM E447)
 - Masonry Cores (ASTM C42)
 - Shear Tests - Masonry Cores (UBC 2405(c)4.C)
 - Dry Shrinkage - Masonry Units (ASTM C426)
 - Sample Pick-up & Delivery
- Masonry Field Inspection:
 - Review mill test certifications of block and reinforcing steel
 - Inspect to determine size and spacing of dowels prior to placement of concrete foundations and/or the start of masonry installation
 - Inspect to determine that cleanouts are provided for high-lift grouting methods
 - Inspect proper lay-up of block units
 - Inspect reinforcing steel prior to grouting
 - Inspect anchor bolts and inserts to make sure they are in place and properly secured prior to grouting
 - Inspect to determine proper consolidation of grout
 - Check that curing requirements are being followed
- Steel Shop and Field Inspection
 - Verify WPS welder qualifications and equipment
 - Field and Shop Welding (groove, multi-pass, fillet, stairs, railings, metal stud, metal backing, reinforcing steel)
 - High Strength Bolting
 - Metal Decking
 - Welded Stud Connectors
 - Fabrication Shop
 - Ultrasonic Examination
 - Magnetic Particle Examination
 - Liquid Penetrant Examination
 - Radiographic Examination
- High Strength Bolt Laboratory Tests:
 - Hardness Test (ASTM A325)
 - Tensile Strength (ASTM F606)
- Wood Fabrication Inspection:
 - Inspect fabrication of structural glue-laminated timber

II. SUBMITTAL REQUIREMENTS

A. General Information:

The District invites qualified Firms to submit an SOQ related to its ability to provide the services, as described herein (for inclusion on a list of qualified firms for future projects). Firms must have experience with the Uniform Building Code (UBC), California Geologic Survey, and the Division of the State Architect (DSA). Firms must have experience in testing and inspection of public-school sites and facilities, working with Project Managers and other District personnel.

1. Each Firm submitting a Statement of Qualifications (SOQ) shall submit one (1) electronic copy in PDF format and three (3) paper copies in a sealed envelope prominently marked with: Request for Qualifications, title, the due date and time, and the name of the organization submitting the statement.
2. Submittals shall be signed by an authorized individual or officer of the firm submitting the statement.
3. Please use only 8 ½" x 11" paper size formatting.
4. Limit the entire proposal to no more than twenty (20) pages (tabs, covers, and resumes not included in page count).
5. In order to control information disseminated regarding this RFQ, organizations interested in submitting qualifications are **not** to make personal contact with the District Superintendent or members of the Governing Board.
6. The Board of Education of the Saddleback Valley Unified School District reserves the right to accept or reject any or all submissions, to negotiate with any or all responsible submitters, and to waive any irregularity in the RFQ. Submitters shall be responsible for any and all expenses that may occur in preparing statements.

B. Submittal Format & Contents:

1. Table of Contents with Inclusions
 - a. **Letter of Interest** - Include name of firm, address, telephone number, fax number, name of principal contact, and number of years in business. Letter must be signed by representative of firm with authorization to bind firm by contract. Please include location of office managing the District projects.
 - b. **Qualifications** - Describe the legal entity under which your organization operates.
 - c. **Experience/Project References** - Include at a minimum, the (3) most recent projects where your firm provided the required services for educational facilities specifically K-14 located in Southern California. For each reference provide the year services were provided and the contract amount.
 - d. **Team Members** - Identify at a minimum the "Key Personnel" that would make up your team for District projects.
 - e. **Litigation/Arbitration/Termination with Owner** - If you have been part of or in any litigations, mediation, or arbitration with the owner, or if you have been terminated for cause while under agreement, describe each event and indicate the final results.
 - f. **State and Agency Coordination** - Describe your organization's familiarity with the procedures and requirements of the state and local agencies and their approval process.
 - g. **Fee Schedule** - Include your firm's fee schedule and billing rates.

The District is not obligated to accept or respond to requests for justification from firms not

selected. The District reserves the right to accept or reject any and all proposals, or any portion or combination thereof, to contract services with whomever and in whatever manner the District decides, to abandon the services entirely, to award on the basis of the total proposal, and to waive any informality or non-substantive irregularity, as the interests of the District may require. The award of a contract is at the sole discretion of the District, acting through the Board of Education.

III. SELECTION PROCESS

A. Selection of Qualified Firms

1. Based on its evaluation of SOQs, the District's selection committee will select firms to include in the pool of qualified firms to receive Request for Proposals on specific projects.
2. The District may perform investigations of proposing parties that extend beyond contacting the districts identified in a Firm's SOQ.
3. 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

B. 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.

All 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.