



SADDLEBACK VALLEY UNIFIED SCHOOL DISTRICT

REQUEST FOR QUALIFICATIONS RFQ #24-07 Construction Management 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 perform/provide Construction Management (CM) Services 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 CM 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 construction management 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 offer by the District to contract with any firm responding to this RFQ. The District reserves its right 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 with: 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 the Uniform Building Code (UBC), Title 24 of the California Code of Regulations, the Division of the State Architect (DSA), construction of public school facilities, working with architects, District personnel, contractors and other school facility related consultants, and establishing project scope and project budgets.

1. Scope of Services.

1.1 Preconstruction Services: Construction Manager shall provide services that relate to the organization and development of the project prior to the start of construction including, but not limited to, the following:

- a) Design Meetings: Attend meetings with staff, special consultants, and Architect to review scope, plans and specifications, logistics, project strategy, and phasing plan.
- b) Constructability Review: Perform a constructability review of the plans and specifications and provide a detailed report to the District and Architect. Coordinate with the Architect the correction or update to the items outlined in the constructability review report.
- c) Value Engineering: If the project is identified to be over budget, then provide a detailed analysis of all major project systems with an emphasis on possible value engineering items.
- d) Master Budgeting: Provide an estimate of construction costs broken down by multi-prime bid package based off the 90% CD's. Update the 90% CD budget as necessary to incorporate changes (resulting from code requirements, District directed, or value engineering de-scoping) in the documents up until the award of the construction prime contracts.
- e) Master Construction Schedule: Provide detailed construction Critical Path Method schedule to be incorporated into the project documents including identification of the project critical path.
- f) Prequalification of Contractors: CM to perform all services necessary to administer a project specific prequalification of Contractors to bid each increment of work and subsequent phases as required to successfully contract all work needed to build the facility. This will be administered as a combination bid and prequalification advertisement utilizing the District's Board approved Prequalification Questionnaire and Evaluation. Include creation of the Advertisement, generation of interest, score evaluation including reference checks, and a summary log of scores using the District's template.
- g) Bidding Strategies: Consult with District staff regarding bidding and strategies with an emphasis upon timing, development of alternates, and bid package scoping. CM to recommend bid package breakdown.
- h) Bid Document Preparation: Prepare all Front End Construction Documents (public works bid packet, scopes of work, bid schedule, supplement conditions) and transmit the Bid Documents to District for distribution.
- i) Bidding Procedures: Administer and expedite the construction contract bid and award process utilizing the District's document distribution process and procedures. CM to utilize an agreed to web site to coordinate the upload and distribution of all bid documents.
- j) Generate Bidder Interest: Maintain contact with potential bidders on a regular basis throughout the bid period. Provide the District with a report broken down by bid package with all Contractors who have verbally committed to provide a bid a minimum of (1) week before the bid due date.

- k) Pre-Bid Job Walks and Conference(s): Coordinate, manage, and document pre- bid job walk and conference(s) as required.
- l) Coordination and Inquiries: Coordinate communications related to bidder inquiries and seek resolution for the appropriate party. Include the management of all pre-bid RFI's, substitution requests, and the creation of the pre-bid Addendum with distribution coordinated District.
- m) Addenda Review: Review each addendum during the bid phase for the cost, or constructability impact, and make appropriate comments or recommendations. Coordinate with the Architect the creation and distribution of the Addenda.
- n) Bid Day: Coordinate and manage the Bid Opening process. Provide staff to receive bids and open and read all bids to the public.
- o) Bid Evaluation: Open bids and evaluate bids for completeness, full responsiveness, and price, including alternate prices and unit prices.
- p) Bid Review and Recommendations to Award: Conduct post-bid conference(s) as required. Review all bid documents, verify all information, and provide a complete bid result summary with recommendations for award to the District.
- q) Project Accounting and Management Systems: In concert with District staff, develop the project accounting and budget management systems.
- r) Notice of Award: Prepare the Notice of Award document utilizing the District's form and issue to the Prime Contractor.
- s) Agreement Documents: Administer the collection and verification of the Agreement with supporting documents and transmit to the District for execution. All documents are to be verified to be correct, packaged per District requirements in an organized manner, and transmitted to the District. District to issue the Notice to Proceed document to the Prime Contractors.

2.1 Construction Services: Construction Manager shall provide services that relate to the organization, management, and supervision of the facility construction including, but not limited to, the following:

- a) Construction Management: Manage and supervise the construction of the facility including coordination with all District Consultants, Public Agencies, and Contractors.
- b) Multi-Prime Delivery Method: Manage all Multi-Prime contracts, including all contract deliverables, pay applications, coordination with other Contractors, Disputes, Claims, etc. to fully implement the full execution of the Contract Documents.
- c) Construction Schedule: Create a base line construction schedule to be utilized in the bid process, perform monthly updates to the master schedule, and create and distribute a (3) week look ahead schedule to the Prime Contractors on a weekly basis.
- d) OAC Meetings: Facilitate a weekly Owner and Architect Coordination meeting, maintain meeting minutes, and provide current RFI's, Submittals, Allowance Usage, Change Orders, and Schedule.
- e) Document Control: Provide document control and maintain consistent communication between all team members. Issue all Construction Documents to all Prime Contractors.
- f) Contractor Change Orders: Prepare and facilitate the execution of all Change Order Requests and Contract Change Orders.
- g) Logistics: Ensure site logistics are modeled to keep safety, order, and a good working environment.

- h) Material Tracking: Maintain a material tracking log for all long lead time items with a lead time of more than (3) weeks.
- i) SWPPP: Oversee and manage the SWPPP process and coordinate the District provided monitoring.
- j) Record Set: Maintain a current set of electronic documents. The plans are to be hyperlinked and updated with all addendum, RFI's, and Architect plan modifications. The set is to be current on a weekly basis, and access to the plans via an online accessible file sharing site is to be provided to the District.

3.1 Construction Project Closeout: Construction Manager shall provide services to ensure that all closeout items identified in the Contract Documents are completed by Prime Contractors. Manage the completion of each Prime Contract and ensure that all forms are submitted for Prime Contractors and District Consultants including, but not limited to, the following:

- a) Prime Contractor Closeout: Close out and recommend to the District a Notice of Completion be filed for each Prime Contractor.
- b) M&O Manuals: Manage the collection and assembly of all Maintenance and Operation Manuals including manufacturer equipment and material warranties.
- c) Trainings: Facilitate the completion of all required trainings.
- d) Attic Stock: Manage the turnover of all attic stock items.
- e) As-Built Documents: Provide accurate As-Built documents in electronic and paper copy to the District.
- f) State/Local Closeout: Actively manage and oversee the filing and record keeping of all related State/Local required documents for project closeout.
- g) Punch List: Facilitate, document, and manage the Prime Contractor punch list of items identified to not be in conformance with the minimum requirements of the Contract Documents.
- h) Submittals: Turn over all submittal copies electronically with a log organized by CSI specification numbers.

2. Firm's SOQ. The submitted 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:

2.1 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 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.

Tab 5 Firm Information. Provide a comprehensive description of the CM 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, including assistant superintendents, facilities directors, teachers and site principals.
- 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.
- 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 approach to construction project.
- Describe your firm’s experience with construction cost reduction measures including how Firm intends to assist District in meeting established project budgets.
- How does your firm approach modernization projects compared to new construction projects?

- Describe your experience with DSA and DSA Inspector.
- 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.
- Discuss the Firm’s ability to meet construction schedules for projects with very tight timetables, Firm’s schedule management procedures, and how the Firm has successfully handled potential delays.
- Provide a list of relevant K-12 projects performed by Firm in the past five (5) years. Provide the information described below for the twenty (20) **MOST RECENT** projects.
 - Name of project and district,
 - Name of project architect,
 - 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,
 - Original construction budget and final construction cost, and
 - 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. This includes any litigation between a contractor and a school district and/or an architect in which Firm was or was not named.

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.

2.2 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.

3. District’s Evaluation / Selection Process.

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

3.2. **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;
- Firm capabilities and track record;
- Overall responsiveness of the SOQ.
- Firm’s pricing information.

The District will notify firms of the pool of qualified firms.

3.3. **Disqualification.** Contact between a proposing firm or a sub-consultant’s firm and any member of the District Administration or Board of Education regarding this project or proposal may result in disqualification of the subject firm from selection.

3.4. **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.

4. **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.