

VENTURA UNIFIED SCHOOL DISTRICT

REQUEST FOR PROPOSALS

Program and Construction Management Services

Responders to this Request for Proposals (RFP) must deliver four signed originals and one electronic copy of the proposal.

Proposal Submission Deadline: **July 10, 2023 at 4:00 pm**

Submit Proposal to: **Ventura Unified School District**
 Vanessa Cordero
 255 W Stanley Ave #100
 Ventura, CA, 93001
 vanessa.cordero@venturausd.org

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REQUEST FOR PROPOSALS

Program and Construction Management Services

SECTION 1 - INTRODUCTION

On March 14, 2023, the Board of Education of Ventura Unified School District (VUSD) adopted Resolution No. 23-13 which authorized the issuance and sale of general obligation bonds pursuant to the bond election that was held on November 8, 2022, known as the Measure E Bonds. Pursuant to this Board direction, VUSD is soliciting proposals to provide professional services related to the management of various construction related projects to be funding through the Measure E Bonds which shall collectively constitute the District's Bond funded "Program." In general, the work will consist of the management and services necessary for the District to identify, establish, and complete construction related projects using Measure E Funds in coordination with the District's team involving all of the District's school sites.

VUSD intends to select one firm that best meets the District's needs to perform program management services and may choose to select the same firm to provide construction management services as described in this RFP. The District may also choose to assign all or parts of the work described to one or more of the successful firm(s). The criteria on which the District makes its determination will be based on the best value to the District, which includes approach to scope, ability and experience as described herein.

VUSD will use a "Qualifications Based Selection" process in determining which Respondent(s) to select for a contract. The process will include an evaluation and ranking of Respondents based on set evaluation criteria as established in this RFP. VUSD, at its sole discretion, may invite select Respondents participate in oral interviews and/or direct negotiations regarding its proposed terms of the potential agreement to establish the specific scope of services as discussed herein. However, any such negotiations and interviews will be conducted at VUSD's sole discretion and therefore, all Respondents are encouraged to provide their best and complete offers within their written proposal submission.

VUSD reserves the right to retain all proposals submitted and to use any of the information contained or suggested within any of the submitted proposals regardless of whether that proposal is selected at no cost to VUSD or compensation to the respondent.

Proposals submitted will be evaluated by individuals from VUSD, and may include Board members. During the evaluation process, VUSD reserves the right, where it may serve VUSD's best interest, to request additional information from respondents, or to allow corrections of errors of omission. The internal analysis conducted by the District is protected from public disclosure except for the ultimate decision of the Board which will be announced during a public meeting.

Submission of a proposal indicates acceptance by the firm of the conditions contained in this RFP, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between VUSD and the selected respondents. VUSD reserves the right, without prejudice, to reject any or all proposals.

1.1 General Description of RFP

This RFP describes the general Scope of Services, necessary RFP components, the selection process, and required format of the RFP.

1.2 RFP Schedule

Release of the RFP	May 19, 2023
Deadline for Questions	June 20, 2023
Response to Questions	June 27, 2023
Deadline for RFP Submittal	No later than 4:00 PM, July 10, 2023
Consultation Selection Interviews	After deadline, to be scheduled appointment
Final Respondent Selection	Anticipated August 8, 2023

1.3 General Selection Process

VUSD intends to select a respondent based on demonstrated competence and qualifications for the types of services to be performed at a fair and reasonable price to the public. VUSD will review all proposals and evaluate them according to the following criteria:

- Qualifications of Team
- District Program Understanding and Innovation
- Work Plan / Scope of Work
- Schedule
- Similar Experience / References
- Price Schedule
- Demonstrated Ability to Meet VUSD's needs as set forth herein

As set forth in Section 3.5 below, VUSD may post additional information about this RFP on its website, including responses to questions. Thus, Respondents are responsible for reviewing VUSD's website to obtain further information to be incorporated into their responses.

Respondents are encouraged to submit all information necessary to address the criteria set forth herein and established throughout this RFP. VUSD, at its sole discretion, may use further negotiations or interviews to identify the respondent that best meets VUSD's needs and requirements.

SECTION 2 - SCOPE OF SERVICES

The selected respondent will work cooperatively with the District staff and other entities hired separately by VUSD, including respondents and architects, to facilitate the timely completion of the Project(s) within the Board approved budgets. The selected respondent will be the District's representative in relation to architects, inspectors, contractors and other respondents and will ensure compliance with plans, specifications and other documentation for each contract.

The District reserves the right to divide up responsibilities among projects or phases of work. The District may contract with a single firm to provide all of the services described herein, or it may

elect to divide the scope of work into phases as follows:

- Program management and design management;
- Construction management for specific sites; or
- Selected services within various projects and sites.

A firm may choose to submit for program management services only, construction management services only, or both; but it is the responsibility of the submitting firm to make it clear which services are being submitted for in the RFP.

Firms may not participate as a General Contractor, Architect of Record, or provide other services that may be deemed as a conflict of interest if they are selected as the District's Program Manager and/or Construction Manager.

The selected project manager shall be responsible for generally performing the following categories of work as applicable to the District's construction Program, including, but not limited to:

A. Anticipated Scope of Work: Program Manager

The Program Management Services will include all services necessary to develop, oversee, and guide the District's Program including:

- a) Develop scope, schedule and sequencing of projects (including a master program schedule), updated at regular intervals to account for changes in the Program and develop specific project budgets;
- b) Prepare a project manual describing a comprehensive document control and approval system to insure that documents are properly approved, handled and maintained;
- c) Develop a communication plan, including the preparation of weekly reports for the District staff, monthly reports for the Board, and participate in the preparation of annual audits conducted by an outside auditing agency.
- d) Manage content for the bond website and coordinate with the District's IT department for timely posting of information, including photos, presentations, and information as needed to update the public on the status of the bond.
- e) Recommend and assist in implementing a financial reporting system, complying with bond mandates.
- f) Develop a filing structure and document control system for a common bond server and actively participate in managing the data stored on the server;
- g) Assist in developing specific vendor solicitations (RFQ/Ps) and vendor "pools" and maintain a database of qualified firms. Extensive knowledge of the public contract code and public procurement procedures is mandatory.

- h) Assist the District in the management and evaluation of separately hired architectural, engineering, CM firms and other specialty respondents.
- i) Assist the District with the implementation of an outreach program to attract and increase participation of local, emerging and Disabled Veterans Business Enterprise (DVBE) firms.
- j) Advise the District regarding project delivery methods for individual projects, based on goals expressed by the District.
- k) Work closely with DSA (and other agencies), design team, construction team and others to receive timely approvals, close-out and submittal review.

B. Anticipated Scope of Work: Management of Design Services

Programming and Design Phase:

Coordinate programming and design work with District faculty and staff, including:

- a) participation in planning workshops, attendance and note taking at meetings and implementation of District standards.
- b) Manage agency input including DSA, OSHA, Fire, Water, Sewer, CEQA, SWPPP, and others involved in the design and construction process. Attend meetings as the District's agent and work with design professionals to obtain all necessary agency approvals.
- c) Coordinate the work of design respondents with District-hired respondents and internal District departments, such as IT and M & O.
- d) Provide value engineering and life cycle cost analysis of drawings.
- e) Review design documents for constructability, consistency, and coordination during Schematic and Design Development phases of work. Coordinate owner-supplied information and expedite design reviews with appropriate user groups. Keep accurate meeting notes.
- f) Advise the District on appropriate procurement method including Lease/Lease- back and Design-Build. Develop contracts for use by LLB and/or DB entity, prepare appropriate Division 0/1 specifications and otherwise advise on all aspects of these procurement methods.

C. Anticipated Scope of Work: Construction Manager

Design Phase:

- a) Prepare a constructability review at 50% CD phase, working with architect to integrate comments in a timely manner. Review and advise District on Division 0/1 documents.

- b) Prepare an independent budget estimate and conduct a budget reconciliation process with the architect/engineer of record.
- c) Prepare a construction coordination plan to include lay down areas, access, construction fence line, temporary paths and signage, and other items that will affect the ability of the District to hold class.

Contractor Procurement Phase (bid phase):

- a) Assist Program Manager with a pre-qualification process for the selection of prime and/or sub-contractors.
- b) Conduct a pre-bid walk through on site.
- c) Coordinate all bid-phase activities with the District, including: public notices, addenda, bid evaluations, reference checks and post-bid conferences.
- d) Assist with bid protests, and assist with the evaluation of bonds and insurance.
- e) Coordinate submittals required by governing agencies and support Program Manager in preparation of reports and other presentations.

Construction Phase:

- a) Review contractor's preconstruction submittals, including submittal schedule, construction schedule, bonds, insurance and schedule of values.
- b) Provide daily management of the contractor and enforce performance, adherence to milestones (including the implementation of a recovery schedule if required), review
- c) contractors' submittals and coordinate with architect to provide efficient timeframe for turn-around.
- d) Attend and chair weekly job-site OAC meetings and review minutes prepared by others. Establish team communication procedures.
- e) Evaluate and process payment applications and verify progress. Evaluate Potential Change Requests and prepare Change Orders for board approval.
- f) Evaluate and insure that requests for information ("RFIs"), shop drawings, sample review, and other submittals are timely.
- g) Assist and support architects' construction administration processes.
- h) Determine substantial completion date and manage release of retention. Coordinate procurement and installation of Furniture, Fixtures, and Equipment (FF&E), swing plan (temporary housing) and move-in process.

Close-Out Phase:

- a) Coordinate contractor training of District staff on systems operations.
- b) Coordinate contractor close-out requirements in a timely manner, including the completion of punch list items, turn-over of warranties, certificates, keys, manuals, as-built drawings, record drawings, daily logs, and verified reports.
- c) Track and coordinate operational reviews with District staff during warranty period and manage corrective work as necessary. Coordinate and arrange for an “11th month” warranty walk-through.
- d) Ensure that building commissioning requirements are fulfilled in a timely manner by District commissioning agents.
- e) Provide DSA close-out; coordinate final testing, documentation, and other regulatory inspections.
- f) Prepare final accounting reports for financial close-out of project.

SECTION 3 - RFP SUBMITTAL REQUIREMENTS

The intent of these requirements is to assist respondents in the preparation of their proposal and to simplify the review process for VUSD. Four wet signed and one electronic copy of the proposal must be received, and date stamped by VUSD no later than **July 10, 2023 at 4:00 PM**. If a proposal is sent by mail or other delivery system, the sender is totally responsible for the mail or delivery system delivering the proposal to VUSD on or before the deadline. Proposals shall be clearly marked “Request for Proposals for Program and Management Services,” and submitted to:

**Ventura Unified School District
Vanessa Cordero
255 W Stanley Ave #100
Ventura, CA, 93001
vanessa.cordero@venturausd.org**

Note: Late submittals or submittals delivered to the wrong location will be rejected regardless of the cause.

VUSD requires the respondent to submit a concise proposal clearly addressing all the requirements outlined in this RFP. The proposal must be signed by respondent’s representative authorized to execute a contract between VUSD and respondent. The proposal must include, at a minimum, the following sections; however, the respondent is encouraged to expand on the scope as needed:

A. Cover Letter

- List the name, address, and telephone number of the firm.
- Signed by an authorized representative of the respondent. The Respondent shall furnish documentation that the person signing the proposal is empowered

with signatory authority for the Respondent. The form could be a Corporate Resolution.

- State the proposal is firm for a 90-day period from the proposal submission deadline.
- Provide the name, title, address and telephone number of the individual to whom correspondence and other contacts should be directed during the Respondent selection process.
- Provide the location of your headquarters. In addition, provide the location of any local support offices, which will provide service to VUSD.
- Acknowledge that you will provide any insurance and indemnification required.

B. Project Team Information

Respondents must provide the names and positions of all staff proposed including staff for proposed sub-respondents. The proposal should also designate who will be the project manager in charge of overseeing all work with VUSD, and who will be VUSD's contact. It is allowable for a single individual to fulfill multiple roles by the Respondent's staff.

C. Work Plan / Understanding of Project Scope

Include a work plan/scope of work meeting the minimum requirements listed in the Scope of Services. Respondents are encouraged to modify or expand the minimum Scope of Services if they believe it is necessary to achieve the goals. Please also include information on what tools, i.e. Microsoft Project, Primavera, or other will be used to manage the work.

D. Proposed Schedule

Respondents can propose the timeline to provide the services identified in the Scope of Services by estimating the time it will take to complete the initial services necessary to start the District's Program, noting that the specifics of the timeline will depend on when the District begins the Program and specific projects.

E. Sub-respondent & Work by Others

Identify any and all sub-respondent proposed to serve on the project, with background information for each and particular experience of key personnel, including project descriptions and resumes.

This section should describe all work not included in the proposal. Any work that is needed to complete the project that is not listed in the "Work Done by Others" will be considered part of the work provided by the Respondent and included in the proposal. Please include a list of tasks which the Respondent expects VUSD staff to perform, information the Respondent expects VUSD to provide, and an estimated amount of VUSD staff time required for each task of the scope of work.

F. Relevant Experience and References

The Respondent must state the qualifications and experience of the proposed team, emphasizing the specific qualifications and experience acquired while providing services similar to those being sought by VUSD, particularly for the Project Manager and other key project staff members assigned to the project. Except under circumstances beyond the Respondent's control, VUSD will not accept substitutions of key members of the team put forth as part of the winning proposal.

For all staff members, describe their role giving not only their title but also the specific services they will perform and illustrate clearly the applicability of the individual's background, education, and experience to his or her assigned role.

Provide a brief description of at least three similar projects for which the Respondent has provided services during the past five years. For all referenced projects list the:

- Client (contact person, address and phone number)
- Project description and location
- Description of services by Respondent
- Total value of services provided by Respondent
- Respondent's project manager
- Key personnel involved
- Sub respondent employed

G. Rate Schedule

A fee schedule capital project management services must be submitted and will be the basis for which the Respondent will be compensated. The rates quoted will remain in effect for the duration of the Agreement, unless amendments are approved by VUSD. Rates shall be included for all employment categories necessary to perform the work outlined in this RFP.

Failure to provide a fee schedule can be grounds for VUSD, at its sole discretion, to determine the submittal to be non-responsive and the proposal may be rejected.

SECTION 4 - SELECTION PROCESS AND EVALUATION CATEGORIES

Proposals submitted will be evaluated by individuals from VUSD. During the evaluation process, VUSD reserves the right, where it may serve VUSD's best interest, to engage in direct negotiations or discussions with selected Respondents, which may involve requests for additional information or requests for clarifications regarding potential respondent errors or omissions within the proposal. However, VUSD, at its sole discretion, may reject any proposal for any reason and only engage in direct negotiations with selected Respondents.

4.1 Selection Criteria

VUSD intends to select a Respondent based on demonstrated competence and qualifications for the types of services to be performed at a fair and reasonable price to the public. VUSD will review all proposals and evaluate them according to the criteria identified in Section 1.3 above.

VUSD may conduct interviews with selected Respondents, which will be scheduled at the

District's convenience.

Respondent will be selected based on all information received by VUSD through this RFP and any interviews and direct negotiations conducted at VUSD's sole discretion.

SECTION 5 - GENERAL TERMS AND CONDITIONS

5.1 Limitation

This RFP does not commit VUSD to award any contract for any of the services set further herein. In no event shall any party be entitled to reimbursement or payment for VUSD for any costs incurred for the preparation or submission of a proposal, or for any costs associated with participating in VUSD's process. VUSD is not responsible for proposals that are delinquent, lost, mismarked, and sent to an address other than that given above, or sent by mail or courier service. VUSD reserves the right to accept or reject any or all RFP responses received because of this request or to cancel all or part of this RFP.

5.2 Public Records

All proposals shall become the property of VUSD and will become public records and, as such, may be subject to public review.

5.3 Contract Agreement

Once a proposed contract agreement is accepted, the Respondent will be required to sign the Agreement for Respondent Services and submit all other required certifications and documentation within ten (10) calendar days of the Notice of Selection from VUSD.

The contents of the submitted proposal will be relied upon and incorporated into the awarded contract and shall become a contractual obligation. Failure of the Respondent to agree to include the proposal as part of the contractual agreement will result in the cancellation of the award. VUSD reserves the right to reject those parts that do not meet with the approval of VUSD, or to modify the Scope of Services, as agreed by Respondent, in the final negotiated contract.

The Respondent selected will be required to sign a Professional Services Agreement. VUSD will require the selected Respondent to provide the indemnification and insurance required per that Agreement. Respondent is advised to pay close attention to the indemnification and insurance requirements. Execution of an agreement does not guarantee Respondent will receive any assignments. Assignment of work under this Agreement will be by task order as approved by the District Director. Thus, Respondent shall not be entitled to any retainer fee or preparation fee as a result of entering into an agreement but will only be paid for work requested and received by VUSD.

SECTION 6 - QUESTIONS

If you have any questions regarding this RFP, prior to **June 20, 2023**, please email:

Vanessa Cordero

Email: vanessa.cordero@venturausd.org

All questions must be submitted in writing on or before **June 20, 2023**. VUSD will post all questions and answers of VUSD's website at <https://www.venturausd.org/about/measure-e> by **June 27, 2023**. Thus, all Respondents are encouraged to review VUSD's website and incorporate the answers into their final proposal. Respondents may not contact any other VUSD employee, representative, or officer included Board of Trustee members regarding this RFP and therefore, must limit its questions to the process set forth herein.