

**Piedmont Unified School District  
760 Magnolia Avenue  
Piedmont, California 94611**

**March 12, 2008**

**REQUEST FOR QUALIFICATIONS**

**CONSTRUCTION OF HAVENS ELEMENTARY SCHOOL**

**RFQ NO. 01-07-08**

Piedmont Unified School District invites responses from qualified firms, partnerships, corporations, associations, persons, or professional organizations to enter into agreements with the District to construct a new Havens Elementary School ("Project") pursuant to the lease leaseback structure (Education Code section 17406, et seq.) and to leaseback a "turn key" Project to the District.

Interested firms or persons are invited to submit their qualifications as described below, with one (1) original unbound copy, and five (5) bound copies of requested materials to be **hand-delivered (no email submittals) to the Office of the Superintendent no later than 3:00 p.m. on Thursday, March 20, 2008.**

**Piedmont Unified School District  
Attn: Constance Hubbard, Superintendent  
760 Magnolia Avenue  
Piedmont, California 94611  
Telephone: 510-594-2614**

Questions regarding this Request for Qualifications ("RFQ") may be directed to Constance Hubbard (510) 594-2614.

The District may, at its discretion, interview some of the respondents. The District intends to schedule these interviews **on Wednesday, March 26, 2008.**

This RFQ is not a formal request for bids, nor an offer by the District to contract with any party responding to this RFQ. The District reserves the right to reject any and all responses. The District also reserves the right to amend this RFQ as necessary. All materials submitted to the District in response to this RFQ shall remain property of the District.

Piedmont Unified School District (hereinafter "District") invites qualified firms to submit qualifications related to its ability to provide development and construction services with respect to the design and construction of the Project described herein. In general, the firm(s) selected as a result of this process ("Firm") will provide a proposal to the District to perform the Project and thereafter work cooperatively with the District Board, staff and consultants, the architect of record and design team, and the Project inspectors, to facilitate the timely completion of the Project. The District wishes to retain a Firm that has the financial strength, management and expertise to assist the District with delivering the Project within the proposed schedule. The District reserves the right to choose individual members of the Firm or the entire Firm. The Firm will be selected based on qualifications and demonstrated competence that include relevant experience with public construction, experience with State of California school construction approval process, and a proven track record for cost-efficient and timely construction Project. The "best value" method of selection will be utilized. The "best value" method includes, but is not limited to, the following selection criteria:

1. Technical expertise;
2. Lifecycle / maintenance / operation costs;
3. District management / compliance cost potential;
4. Skilled labor force;
5. Safety record;
6. Design / value engineering approach;
7. Project approach;
8. Project features;
9. Schedule; and
10. Warranty

### **Description of Project**

The Project for which the District is seeking responses is to construct a new Havens Elementary School, as more specifically described in **Exhibit "A,"** attached hereto.

### **Description of District Needs and Project Administration**

#### **General Information**

This Project is still in the design phase. The District's Architect of Record for the Project will be ATI Architects and Engineers.

The District intends to select the Firm that best meets the District's needs to perform the development and construction services as described in this RFQ. The Firm will be the District's representative in relation to any trade contractors hired by the Firm, and will insure compliance with the Project Plans.

In addition to constructing the Project, the Firm's responsibilities during the planning stages will include:

- Value engineering,
- Facilitating meetings with members or representatives of the school community with an interest in the Project,
- Master scheduling the Project per preliminary master schedule, milestones established by the District, and
- Budgeting for the Project.

#### Lease Leaseback Structure

The Project will be funded from various sources, and any agreement reached will conform to the statutory framework for the lease/leaseback delivery method (Education Code section 17406, et seq.).

Prior to commencing with the Project, the Firm shall enter into a pre-construction services agreement with the District to perform a constructability review, develop estimates, review the Project Plans, and develop specific cost reduction strategies to address budgetary constraints maximizing the value to the Project of those cost reduction efforts.

The Firm may be responsible for financing a portion of the construction of the Project. During construction, the District shall pay tenant improvement payments at a pre-determined payment amount. If financing is required, once the Project are complete, the Firm shall lease the facilities constructed back to the District for a pre-determined monthly lease payment amount. The District intends the lease to include an early termination payment option for the District. The amount which the Firm may be asked to finance may be as much as twenty-five million dollars (\$25,000,000).

#### Schedule

The Project must be fully complete by August 1, 2010.

#### Project Estimates

The current construction estimate for the Project (hard and soft costs) is \$20 million. The District expects significant cost reductions to be realized through cost cutting efforts with the Firm as described herein.

## District Project Management Description

The Piedmont Unified School District's Superintendent, Assistant Superintendent, Construction Manager or their designee will be the primary point of contact between the Firm and the District.

## **Submittal Requirements**

All responses should include the following items in the order set forth below:

Cover Letter

Table of Contents

### Firm Information

- Name, address, and brief history of the Firm. Please include any former names of the Firm and the number of years the Firm has participated in construction as a general.
- Organizational chart of the Firm.
- A description of the Firm and its organizational structure. Resumes of personnel to be involved with the Project should be included, including their school construction experience. Upon engagement, any change in personnel must be approved by the District. The Firm shall be responsible for any additional costs incurred by the engagement of a change in personnel.
- Provide the volume of construction in dollars for each of the past five (5) years.
- Provide a statement regarding the Firm's availability and resources.
- Provide a statement on financial resources, bonding capacity, and insurance coverage.
- Provide a claims statement: Submit a statement indicating any and all suits or claims in which the Firm or its personnel instigated litigation regarding construction projects within the past five (5) years.
- Contractor license number and whether license has been revoked or suspended in the last five years.
- Provide signatory status.

- Location of nearest local office and main office, if different.

### Prior Relevant Experience

- Description of the Firm's experience with respect to the areas of school or similar construction over the past five (5) years. Specifically, please provide:
  - A list of all projects your Firm has been involved with for the past five (5) years where the total project contracts exceeded \$50 million per project. Within that list:
    - Include all projects involving public and private schools;
    - Provide a contact name and number for the owners and indicate which key Firm personnel worked on each project.
  - Include examples of other similar project assignments on the part of the Firm.
  - List projects your Firm has successfully completed that have some or all of the following obstacles, including the creative solutions from the Firm on how these obstacles were overcome:
    - A very aggressive schedule;
    - Significant budgetary restrictions.
    - Be prepared to expand upon the following:
      - what you did to accommodate the complexity of the project,
      - the needs of the clients on site,
      - minimize inconveniences, and
      - maximize their safety.

### Other

Examples of involvement in the community.

### Assurances

The Firm must acknowledge each of the following items and confirm that it will be willing and able to perform these items:

- **Preconstruction Services:** The Firm shall provide services that relate to the organization and development of the Project prior to the start of construction including the following:

- **Site Evaluation:** Consult with District staff in relation to the existing site. The Firm should make site visits, as needed to review the current site conditions. During this evaluation, the Firm may make recommendations relating to soils investigations and utility locations and capacities, in order to minimize unforeseen conditions.
- **Plan Review:** Provide plan review and constructability services with an emphasis on ensuring that the Project can be completed within the established schedule and within the available budget.
- **Design Team Meetings:** Attend meetings in Piedmont with the Architect of Record and the design team every two weeks (approximately 2 hours).
- **Value Engineering:** Provide a detailed analysis of all major Project systems with an emphasis on possible value engineering possibilities.
- **Detailed Construction CPM Schedule:** Produce detailed construction CPM schedules to be incorporated into the Project documents including identification of the Project critical path and agency approvals.
- **Preliminary and Detailed Estimates:** Provide preliminary construction estimates using like-kind construction costs. Upon receipt of the Project Plans, provide detailed construction estimates showing the values of all major components of the Project.
- **Trade Contractors:** Provide the name(s) and scope(s) of work of each trade contractor for the following trades that the Firm intends to use on the Project:
  - Earthwork
  - Storm Drainage
  - Structural Steel
  - Roofing
  - Metal Framing
  - Elevators
  - Plumbing
  - HVAC
  - Electrical
- **Construction Planning:** Plan the phases and staging of construction, staging areas, temporary fencing, office trailer placement, access, etc. as required.

- **Method and Strategic Plan:** Describe your proposed method and strategic plan.
- **Other services:** Any other services that are reasonable and necessary to control the budget and schedule. List those areas where subconsultants will be required and where the Firm has in-house expertise. Provide resumes of persons providing each of these services and for key personnel assigned to the Project.
- **Construction Services**
  - **Project Accounting and Management Systems:** Project Accounting and Management Systems: In concert with District staff, develop the Project accounting and budget management systems. A process of up-to-date costs will be necessary. During construction, monthly reporting will be required.
  - **General Conditions:** List what is included in the Firm’s general conditions (including full-time and part-time personnel) and a monthly value of the general conditions. Indicate what would be included as a cost of work vs. a line item in the general conditions.
  - **Management of Projects:** Administer and coordinate on a daily basis the work of all trade contractors the Firm hires to work on the Project. Enforce strict performance, scheduling, and notice requirements. Document the progress and costs of the Project. Report proactively on potential schedule impacts. Recommend potential solutions to schedule problems.
- Work cooperatively with District, and the design team, and all of the Firm’s trade contractors to ensure the Project is delivered on time and within budget.
- Coordinate and attend weekly job site meetings and prepare and circulate minutes. Evaluate and process payment applications and verify progress. Evaluate and process change order requests if the Firm intends to seek reimbursement from the District.
- Evaluate and track requests for information (“RFIs”) and responses. Advise District as to status and criticality of RFIs. Evaluate and track submittals, substitutions and change orders. Work with District, and the design team to develop lists of incomplete or unsatisfactory work (“punchlists”).

- Submit necessary reports to state authorities, including DSA verified reports. Ensure that all other Project participants submit necessary documentation.

### **District's Evaluation Process**

A review and selection committee that the District intends to be composed of key personnel from within and outside the District will review and evaluate all submitted documents received per this RFQ.

Submittals will be opened privately to assure confidentiality and avoid disclosure of the contents to competing respondents prior to and during the review, evaluation and negotiation processes. However, to the extent that the submittals are public records under California law, the submittals may be released to the public if requested by members of the public.

Submittals will be reviewed for responsiveness and evaluated pursuant to established objective criteria, with particular attention to, without limitation, each respondent's qualifications, demonstrated competence in like construction, and the Firm's ability to integrate its personnel with the District's staff and consultants.

After the submittals are evaluated and/or ranked, the District, at its sole discretion, may elect to interview the top Firm(s). The District may elect to interview one or more Firms. Interviews are scheduled for Wednesday, March 26, 2008. Adequate time will be allowed for presentation of qualifications followed by questions and answers.

If a commitment is made, it will be to the most qualified respondent with whom the District is able to successfully negotiate the terms and conditions of the required agreement documents.

Final selection of a Firm, terms and conditions of any and all agreements and authority to proceed with noted construction services, shall be at the discretion of the District.

The selection committee will recommend the most qualified Firm to the District's Board and will issue a letter of intent to commence negotiations of services to the most qualified Firm.

If the District is unable to successfully negotiate a satisfactory agreement with terms and conditions the District determines to be fair and reasonable, the District may then commence negotiations with the second most qualified Firm in sequence until an agreement is reached or determination is made to reject all submittals.

## **Exhibit “A”**

### **Description of Project**

#### **PROJECT INFORMATION**

This project will replace Havens Elementary School with the exception of the Ellen Driscoll Theater which will be seismically retrofitted and modernized under a separate design contract. The project includes all building related construction, hazardous material abatement, demolition of existing structures, new site utilities, site improvements, landscaping and irrigation. The character and layout of the school will be based upon a design developed by a Piedmont parent and presented to the School Board on January 29, 2008. The replacement school will include 22 classrooms, an administrative area, a multipurpose building, a library, support facilities as well a “Schoolmates” facility owned by the City of Piedmont. Site improvements will include a grass field and a paved playground, perimeter fencing, play structures and matting, striping for games and activities, low level site lighting, drinking fountains, trash containers etc. There will be an area for recyclables as well as trash pickup. This will be a sustainable project; however, it may not achieve CHPS or LEED certification. The school shall meet the requirements of the 2007 California Building Code as well as the requirements of OPSC and CDE for new schools. The project will be permitted through the Division of the State Architect. The project will use a Lease-Leaseback method of project delivery allowing for early selection of a contractor while the design is underway.