

**Piedmont City Unified School District  
760 Magnolia Avenue  
Piedmont, CA 94611**

**REQUEST FOR PROPOSALS  
PROGRAM MANAGEMENT SERVICES  
G. O. BOND PROJECT - MEASURE E**

**(RFP NO. 01-06-07)**

**July 10, 2006**

The Piedmont City Unified School District invites proposals from qualified individuals or firms to provide comprehensive construction program management services to the District.

The District will be undertaking major modernization and seismic projects at the District's schools. Further details are stated in the Project Description and List of Measure E projects attached as Exhibit A. The construction costs under management are initially expected to be in the range of \$15 million, but may be extended to future construction projects. Construction on the campuses is expected to begin in 2006.

Interested firms are invited to submit their proposals as described below, with one (1) original and five (5) copies of requested materials to:

**Constance Hubbard, Superintendent  
Piedmont City Unified School District  
760 Magnolia Avenue  
Piedmont, CA 94611  
Facsimile 510.654.7374  
Phone 510.594.2614  
Email: [chubbard@piedmont.k12.ca.us](mailto:chubbard@piedmont.k12.ca.us)**

**Mandatory Walk-through: July 26, 2006 -12:00 noon  
Meet at District Office at 760 Magnolia Avenue, Piedmont, CA**

Questions regarding this RFP and the scheduling of an alternate date for the mandatory site visit may be directed to Constance Hubbard, Superintendent, 510.594.2614 or [chubbard@piedmont.k12.ca.us](mailto:chubbard@piedmont.k12.ca.us). Also, questions on this RFP will not be accepted unless they are in writing by letter, electronic mail, or facsimile and submitted by 4:00 pm, July 28, 2006. Answers to all questions will be distributed via email on August 2, 2006 by 6:00 pm.

**All responses to this RFP must be received by noon, August 11, 2006. The submittal package should be no more than five pages in its entirety.**

**This is neither a formal request for bids, nor an offer by the District to contract with any party responding to this request. This RFP does not commit the District to award a contract or to reimburse any applicant for costs incurred in submitting qualifications. The District, in its sole discretion, reserves the right: to reject any or**

**all responses submitted; to choose any combination of firms or qualifications; to interview any, all, or none of the respondents; to negotiate with any respondent on a proposal; or to amend or cancel in part or in its entirety this RFP.**

## **INSTRUCTIONS FOR SUBMITTING PROPOSALS**

### **1. GENERAL**

The District intends to select one or more individuals or firms or both that best meet the District's needs to perform the planning, program management, and project/construction management services as described below in this RFP. **The District may assign all or parts of the work described below to one or more of the successful individual(s) or firm(s).** The criteria on which the District makes its determination will not be limited to the schedule of fees, but will also be based on ability and experience as described herein.

### **PROPOSED INITIAL PROJECTS**

The scope of work shall include the services related to the list of projects listed in Measure E as per Exhibit A. The initial scope of work is directed towards the buildings that were identified as most hazardous in preliminary seismic evaluations.

The initial projects consist of the seismic strengthening/modernization or replacement of the main classroom building at Havens Elementary School ("Havens"); the seismic strengthening/modernization of the Piedmont High School (PHS) buildings: 30's/Library building, the Alan Harvey Theater, the Student Center; and the modernization of other school buildings that have been identified as having seismic concerns.

As part of the seismic deficiencies identified at the Havens main classroom building are two wings that are designated as highly vulnerable such that the students assigned to those classrooms are being moved to portables on the playground in time for the start of the 2006-07 school year. Seismic concerns coupled with accessibility issues (which are compounded by the age of the building and the mechanical operating systems) require that significant construction work be done to mitigate the deficiencies at Havens. Modernization cost must be compared with the cost of replacement. The successful firm will manage the seismic repair, either by use of the current facility or by total replacement of Havens, including accessibility and fire/life safety work required by the Division of the State Architect (DSA). Also, any firm selected will provide the necessary information to the Board of Education and the Havens' parent community as to the most cost-effective course to pursue, i.e., modernization or demolition and new construction.

The Piedmont High School 30's/Library, Alan Harvey Theater and Student Center buildings have also been identified as needing immediate attention. Preliminary design information indicates that work may be able to be done while school is in session and that the building may be used during construction. Management of that process will be required.

The firm(s) selected as a result of this process (“Program Manager”) shall be responsible for the following general categories of work:

- Master Planning: Verify and update the cost estimates in the Facilities Master Plan; advise the District on phasing, grouping of projects, and other cost-saving methods.
- Program Management: Work with the District on overall scheduling, budgets, and communication for all Bond Measure E projects and decisions related to these projects; report to the District on program and individual project status on a regular basis.
- Project/Construction Management: Provide design-phase services in conjunction with all architecture firms awarded work by the District; assist with bidding; manage the construction contracts; close out the projects. The District may utilize multiple-prime bidding on these projects.

The phasing and scoping of each project will be determined in the planning process with the involvement of the selected Program Manager(s).

**The District may contract immediately with a single individual or firm to provide all of the services described herein, but it may elect to divide the scope of work into phases as follows:**

- 1. Project Management for specific projects;**
- 2. Program Management and Master Planning for all sites;**
- 3. Selected Project/Construction Management services for various projects and school sites.**

## **2. RESPONSIBILITIES OF PROGRAM MANAGER**

**It is vital that the selected individuals or firms have the ability to work cooperatively and effectively with the Board, the Superintendent, the various advisory committees, and the community. The District places great emphasis on facilitation and communication with all of the District staff and the stakeholders in the Piedmont area. Furthermore, close daily contact and communication with the Superintendent and the ability to take direction and delegation of responsibilities and make decisions while keeping all parties apprised of issues is likewise crucial. The Program Manager(s) retained by the District will be part of the District team and be expected to operate in a team environment.**

## 2.1 INITIAL PLANNING PHASE

Advise the District on decision-making with regards to the seismic retrofit program. Define a methodology that relates the cost of proposed solutions to the benefit from each seismic upgrade option.

Advise the District on phasing, grouping of projects, and other potential cost-saving approaches to construction. Develop scopes of work, including recommendations regarding interim housing and deferred maintenance. Assist and advise the District in prioritizing projects.

Verify and update the cost estimates in the Facilities Master Plan. Develop final construction program Master Plan.

Develop master project communication plan, incorporating project participants, District administration, site personnel, community, parents, and website.

Based on performance in Initial Planning phase, the District may approve going forward with one or more phases of the following work.

Work cooperatively and effectively with all stakeholders and keep communications open and timely.

## 2.2 PROGRAM MANAGEMENT DUTIES

Work with the District to develop scope, sequencing, scheduling, budgets, and communication for all modernization and seismic projects. Develop and maintain reporting systems for each of those components. Report to the District on program and project status on a regular basis throughout the course of the construction program.

Advise District regarding project delivery systems and bid packaging strategies. Make recommendations to District regarding ongoing modifications to the Master Plan and bond funded projects to account for changes in sequencing, delays, and cost issues.

Assist in selection of and communication with architects and Inspectors of Record. Advise on and coordinate work of subconsultants such as soils consultants. Participate in planning workshops. Attend meetings with site committees and the District Modernization Committee. Provide training to District staff and Board of Trustees.

Advise on an ongoing basis regarding communication with state and other agencies involved in construction process, including the City of Piedmont Public Works Department, Division of the State Architect ("DSA"), and State Department of Education ("CDE"). Assist, as requested, with compliance with the California

Environmental Quality Act (“CEQA”) and other regulatory requirements. Assist, as requested, on extra services basis, with applications for state funding.

## 2.3 PROJECT MANAGEMENT/CONSTRUCTION MANAGEMENT DUTIES

### 2.3.1 Design Phase

Work with the architects to develop and refine designs to correlate design to budget and Master Plan. Perform constructability reviews at appropriate stages of design. Prepare cost estimates. Assist with verification of site conditions. Assist in segregating bid packages for maximum cost-effectiveness for the District. Advise regarding owner-supplied equipment and other potential cost-saving measures.

Report to District on status of design and state approval versus the schedule for each project. Attend meetings to coordinate design efforts for the bond program. Assist in identifying and obtaining all necessary approvals.

### 2.3.2 Pre-Construction and Bidding Phase

Develop master schedules and construction schedules for each project. Develop budgets for each project.

Conduct pre-bid conferences. Schedule and conduct preconstruction meetings. Assist with prequalification and evaluating responses. Conduct bidding and report to District on results. Assist and advise regarding bid protests. Coordinate contracting with low bidders, including evaluating bonds and insurance.

### 2.3.3 Construction Phase

Note: The District may utilize multiple-prime construction contracting on these projects. Proposals should assume that the District will use a mix of general contracting and multiple-prime contracting, and should provide fee proposals under each methodology.

Administer and coordinate the work of the contractors on a daily basis. Enforce performance, scheduling and notice requirements. Monitor schedule and cost information for each prime contractor on each project. Document the progress and costs of each project. Report and advise proactively on potential schedule and budget variances and impacts. Recommend potential solutions to schedule and cost problems.

Work cooperatively with District, architects, and contractors to ensure that projects are delivered on time and within budget. Attend weekly job site meetings and prepare and circulate minutes. Evaluate and process payment applications and verify progress. Evaluate and process change order requests.

Evaluate and track requests for information (“RFI’s”) and responses. Advise District as to status and criticality of RFI’s. Work with District 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 closeout documentation.

#### 2.3.4 Post-Construction Phase

Ensure completion of punchlist work. Coordinate contractor closeout requirements, including guarantees, keys, manuals, record drawings, daily logs, and verified reports. Set up programs to obtain and monitor warranty work. Advise District staff on systems operations and training. Advise on closeout of projects.

### 3. REQUIRED INFORMATION IN PROPOSAL

All materials submitted to the District in response to this Request for Proposals shall remain the property of the District. **Please complete the Form attached to respond to this Section 3.**

Extensive experience with the Office of Public School Construction (“OPSC”), CDE, DSA, Uniform Building Code (“UBC”), and Title 24 of the California Code of Regulations is **mandatory**.

#### 3.1 FIRM INFORMATION

Provide a brief history of your 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. Identify proportion of program and construction management of overall business, and of K-12 public school projects of overall business.

Identify each K-12 public school project performed by your firm(s) in the past 5 years, including:

- Name of project and district;
- Contact person and telephone number at district;
- Firm person in charge of each project;
- Dollar value of each project.

List all litigation arising from any K-12 public school project on which your firm(s) provided program or project/construction management services in the past 5 years. State the issues in litigation, the status of litigation, names of parties, and outcome.

### 3.2 PROPOSED PROGRAM STAFFING

The selected individual or firm shall employ, at its expense, professionals properly licensed and skilled in the execution of the functions required for the planning, program management, and project/construction management of the projects. All services are to be performed under the direction and control of an architect, registered engineer, and/or contractor, each of whom is required to be licensed by the State of California.

Identify the key personnel you would assign to the District's program for each phase of work, including their roles. Include at least the overall Program Director, Program Manager(s), and Project Managers. Describe for each his or her experience with K-12 public school construction projects, including identifying those projects for the past 5 years. List license numbers and dates.

### 3.3 PROPOSED METHODOLOGY AND CAPABILITIES

Describe the firm's technical capabilities with regards to seismic retrofitting and decision-making related to the seismic retrofit of buildings and, in particular, the retrofit of school or public school buildings. Describe experience in decision-making related to the retrofit versus replacement decisions in a seismic retrofit program.

Describe the firm's technical capabilities for scheduling, budgeting, cost estimating, document control, and the production of data for public information websites. Provide recent examples of reports for each category.

Describe the firm's approach to and experience with energy management/conservation, integrated communications systems, "green buildings," and evaluating technology infrastructure.

Describe the firm's experience with state and other agencies involved in the planning, design, and construction process for K-12 public school projects. Describe the firm's quality control systems, including ability to monitor subconsultants, if any.

### 3.4 COST AND FEE SUMMARY

Provide a preliminary fee schedule for the work described in this Request for Proposals. The District may negotiate alternative fee payment structures after time. If fee schedule will vary between general contracting and multiple-prime contracting management, summarize fee structure for each.

## 4. DISTRICT'S EVALUATION PROCESS

### 4.1 SCHEDULE

4.1.1 Walkthrough/Site Visit: Wednesday, July 26, 2006 – 12:00 noon

4.1.2 Questions on RFP Cutoff: 4:00 pm, July 28, 2006.

- 4.1.3 Submittals: due by 12:00 noon, August 11, 2006
- 4.1.4 Finalists notified: August 16, 2006
- 4.1.5 Finalists to Submit detailed confidential fee schedule: August 18, 2006  
by 4:00 pm
- 4.1.6 Interviews: August 21, 2006
- 4.1.7 Final determination: August 23, 2006

## 4.2 SELECTION OF FINALISTS

Based on the information submitted in the Proposals, a committee will select a group of up to five (5) finalists for further evaluation. The criteria for selecting finalists may include, without limitation:

- Experience and performance history of the firm with similar programs;
- Experience and results of proposed personnel;
- References from clients contacted by the District;
- Technical capabilities and track record of their use, and
- Overall responsiveness of the proposal.

## 4.3 INTERVIEWS

The finalists will be required to submit in advance of the interview a detailed fee proposal. This fee proposal shall include all charges and costs proposed to be charged to the District, including rates for extra work. The fee proposals shall remain confidential except to the extent that a successful firm's proposal may be incorporated into an agreement with the District.

The finalists who elect to pursue the work with the District will be invited to meet with the District's selection committee. The key proposed project staff will be expected to attend the interview. The interview will start with an opportunity for the firm to present its proposal and its project team. The interview will be an opportunity for the District selection committee to review the proposal, the firm's history, and other matters the committee deems relevant to selecting the firm. The committee may inquire as to the firm's suggested approaches to the projects and the issues identified in this Request for Proposals.

The District will provide a form of agreement to finalists before the interview. Any comments or objections to that form of agreement shall be provided in writing before the interview, and may be the subject of inquiry at the interview.

The District may perform investigations of proposing firms that extends beyond contacting the districts identified in the proposals. Following the interviews, the selection committee will make recommendations to District staff and the Board regarding the candidates and awarding the contract. The criteria for these recommendations will include those identified above, as well as cost considerations based on the fee proposals.



#### 4.4 FINAL DETERMINATION AND AWARD

The District reserves the right to contract with any entity responding to this Request for Proposals for all or portions of the above-described phases, to reject any proposal as non-responsive, and not to contract with any firm for the services described herein. The District makes no representation that participation in the Request for Proposal process will lead to an award of contract or any consideration whatsoever. The District reserves the right to seek proposals from or to contract with any firm not participating in this process. The District shall in no event be responsible for the cost of preparing any proposal in response to this Request for Proposals.

The awarding of a contract is at the sole discretion of the District. The District expects to award contract(s) for the services identified in this Request for Proposals at the Board meeting of August 23, 2006.

The District may, at its option, determine to award contract(s) for only phases of the work or for only portions of the scopes of work identified herein. In such case, the successful proposing firm will be given the option not to agree to enter into the contract and the District will retain the right to negotiate with any other proposing firm selected as a finalist. If no finalist is willing to enter into a contract for the reduced scope of work, the District will retain the right to enter into negotiations with any other firm responding to this Request for Proposals.

**PROGRAM MANAGER FIRM QUALIFICATION FORM**

**1. FIRM INFORMATION**

Provide a brief history of your firm, and, if a joint venture, of each participating firm.

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Identify legal form, ownership, and senior officials of company(ies).

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Describe number of years in business and types of business conducted. Identify proportion of program and construction management of overall business, and of K-12 public school projects of overall business. (Please attach a separate sheet, if needed.)

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Identify each K-12 public school project managed by your firm(s) in the past 5 years, including: (Please attach a separate sheet, if needed)

Name of Project and District: \_\_\_\_\_  
Contact Person and Telephone Number at District: \_\_\_\_\_  
Firm Person in Charge of Each Project: \_\_\_\_\_  
Dollar Value of Each Project: \_\_\_\_\_

Name of Project and District: \_\_\_\_\_  
Contact Person and Telephone Number at District: \_\_\_\_\_  
Firm Person in Charge of Each Project: \_\_\_\_\_  
Dollar Value of Each Project: \_\_\_\_\_

Name of Project and District: \_\_\_\_\_  
Contact Person and Telephone Number at District: \_\_\_\_\_  
Firm Person in Charge of Each Project: \_\_\_\_\_  
Dollar Value of Each Project: \_\_\_\_\_

List all litigation arising from any K-12 public school project on which your firm(s) provided program or project/construction management services in the past 5 years. (Please attach a separate sheet, if needed.)

State the issues in litigation: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Status of litigation: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Names of parties: \_\_\_\_\_  
\_\_\_\_\_

Outcome: \_\_\_\_\_  
\_\_\_\_\_

2. PROPOSED PROGRAM STAFFING

The selected individual or firm shall employ, at its expense, professionals properly licensed and skilled in the execution of the functions required for the planning, program management, and project/construction management of the projects. All services are to be performed under the direction and control of an architect, registered engineer, and/or contractor, each of whom is required to be licensed by the State of California.

Identify the key personnel you would assign to the District's program for each phase of work, including their roles.

Program Director: \_\_\_\_\_  
Program Manager(s): \_\_\_\_\_  
Project Manager(s): \_\_\_\_\_

Describe for each his or her experience with K-12 public school construction projects, including identifying those projects for the past 5 years:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

List license numbers and dates:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. PROPOSED METHODOLOGY AND CAPABILITIES

Describe the firm’s technical capabilities for scheduling, budgeting, cost estimating, document control, and production of data for public information websites. Provide recent examples of reports for each category. (Please attach a separate sheet, if needed.)

Scheduling \_\_\_\_\_

Budgeting \_\_\_\_\_

Cost Estimating \_\_\_\_\_

Document Control \_\_\_\_\_

Data for Public Information Websites \_\_\_\_\_

Describe the firm’s approach to and experience with energy management / conservation; integrated communications systems, “green buildings,” and evaluating technology infrastructure.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. COST AND FEE SUMMARY

Provide a preliminary fee schedule for the work described in this Request for Proposals. The District may negotiate alternative fee payment structures after time. If fee schedule will vary between general contracting and multiple-prime contracting management, summarize fee structure for each.

7-11-05  
3:45 p.m. / bf

## **EXHIBIT A**

### **FULL TEXT OF BOND MEASURE for PIEDMONT CITY UNIFIED SCHOOL DISTRICT**

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#### **PIEDMONT CITY UNIFIED SCHOOL DISTRICT SCHOOL SEISMIC RISK REDUCTION SAFETY AND ACCESS PROGRAM MEASURE**

##### **INTRODUCTION**

To repair, reconstruct, or replace Piedmont public school buildings to reduce dangers from earthquakes and to meet state and federal recommended seismic safety standards, provide safe classrooms and facilities and to improve the likelihood of Piedmont schools qualifying for state matching funds, shall the Piedmont City Unified School District issue a maximum of \$56 million in bonds, with interest rates within legal limits, and appoint a Citizen's Oversight Committee to guarantee all money raised in our community benefits local children?

The Piedmont City Unified School District operates 3 elementary schools, 1 middle school, a traditional high school, and an alternative high school serving 2,600 students. Each of these school campuses contains a mixture of old and new buildings and facilities. For the safety of the District's students, parents, visitors, teachers, and staff, the Board of Education commissioned a comprehensive study of the seismic safety and accessibility of the District's school buildings and facilities. This professional study has determined that many of the District's school buildings and facilities are at risk of damage or collapse in the event of an earthquake, and many do not meet modern requirements for handicapped accessibility. As a result of this study, the Board of Education is proposing a series of projects designed to bring these school buildings and facilities up to current state and federal earthquake safety standards and meet modern handicapped accessibility requirements, in order to better protect and serve the District's students, parents, visitors, teachers, and staff.

##### **SCHOOL FACILITIES PROJECTS TO BE FUNDED FROM BOND PROCEEDS**

The following list includes both projects that can be completed using the bond proceeds, along with State matching funds and other building funds the District is projected to receive, and projects that are planned and needed but whose construction is contingent on the amount of bond funds available, plus the amount of State matching and other building funds the District may receive in the future, which is a function of the State building program rules, passage of State bonds, and the growth rate of the District. The completion of specific projects is also contingent on final project costs.

## **Projects to be Addressed in Approximate Priority Order**

- First group to be addressed. These are the structures that are used the most by students and the community and have been designated a collapse hazard. Sequence will depend on many factors, including time required for plan development and Division of State Architect approval, student placement during work and cost of project.
  - Havens Elementary School buildings - rehabilitation, reconstruction, or replacement;
  - Piedmont High School '30's/Library buildings - rehabilitation, reconstruction, or replacement;
  - Piedmont High School Student Center - rehabilitation, reconstruction, or replacement;
  - Wildwood Elementary School auditorium - rehabilitation or reconstruction.
  
- Second Group to be addressed:
  - Beach Elementary School's '30's vintage classroom buildings and auditorium – rehabilitation or reconstruction;
  - Wildwood Elementary School's '30's vintage classroom portion of buildings not addressed as part of auditorium - rehabilitation or reconstruction;
  - Alan Harvey Theater at Piedmont High School – rehabilitation, reconstruction, or replacement;
  - Ellen Driscoll Auditorium at Havens Elementary School - rehabilitation, reconstruction, or replacement.
  
- Third group to be addressed:
  - Piedmont Middle School – improve handicapped accessibility of buildings and campus;
  - Piedmont High School - improve handicapped accessibility of buildings and campus;
  - Piedmont High School – rehabilitation, reconstruction, or replacement of maintenance yard facilities.

Unless otherwise specified, the specific work to be done for each project will address both seismic safety and ADA handicapped accessibility issues. Modifications in the project definition and sequence to be made based on revenue eligibility from the State and cost of prior projects.

The Board of Education hereby certifies that it has evaluated the safety, class-size reduction, and information technology needs of the District in developing this list of school facilities projects.

## **ACCOUNTABILITY MEASURES**

If the bonds are approved, the Board of Education will implement the following accountability measures in accordance with State law:

- (a) Use the proceeds from the sale of the bonds only for the purposes of construction, reconstruction, rehabilitation, or replacement of school facilities, including the furnishing and equipping of school facilities, as specifically set forth in this Exhibit A, and paying costs incident thereto, but not for any other purpose, including board member, administrator, teacher, or staff salaries or benefits or other school operating expenses;
- (b) Conduct an annual, independent performance audit to ensure that the bond proceeds have been expended only on the projects listed in this Exhibit A;
- (c) Conduct an annual, independent financial audit of the proceeds from the sale of the bonds until all of those proceeds have been expended for school facilities projects listed in this Exhibit A;
- (d) Establish and appoint members to an independent citizens' oversight committee made up of local residents representing the local business community, senior citizens' organizations, taxpayers' organizations, parents of District students, and members of the District's Parent-Teacher organization and School Site Councils, to ensure the bonds are used only for the projects listed in this Exhibit A;
- (e) Create an account into which the bond proceeds shall be deposited; and
- (f) Provide for an annual report to the Board by the District's chief fiscal officer pursuant to Government Code section 53411 containing (i) the amount of bond funds collected and expended; and (ii) the status of any project required or authorized to be funded by the bonds.

### **STATE MATCHING FUNDS**

California Education Code section 15122.5 requires the following statement to be included in this sample ballot:

"Approval of this bond measure does not guarantee that the proposed projects in the Piedmont City Unified School District that are the subject of bonds under this measure will be funded beyond the local revenues generated by this bond measure. The school district's proposal for certain of the projects assumes the receipt of matching state funds, which are subject to appropriation by the Legislature or approval of a statewide bond measure."