SAN LEANDRO UNIFIED SCHOOL DISTRICT
Business & Operations Department
14735 Juniper Street
San Leandro, CA 94579

_____, 2017

REQUEST FOR QUALIFICATIONS AND FOR PROPOSALS FOR PRELIMINARY AND CONSTRUCTION SERVICES (LEASE-LEASEBACK)

The San Leandro Unified School District ("**District**") is requesting submission of:

- A prequalification questionnaire ("**Prequalification Questionnaire(s)")**, and
- A statement of qualifications and a proposal ("**Proposal**")

(together, "**Response(s)**") from qualified firms, partnerships, corporations, associations, persons, or professional organizations ("**Contractor(s)**" or "**Firm(s)**") to perform preliminary services and construction services for the project identified here in **Attachment 1** ("**Project(s) Description**") pursuant to a lease-leaseback structure. (Education Code section 17406.)

Basic Requirements. Contractors that intend to submit a Response to this Request for Qualifications and for Proposals for Preliminary and Construction Services (Lease-Leaseback) ("**RFQ/P**"). must be:

- Insured;
- Hold a Class B Contractors License, which is current, valid, and in good standing with the California Contractor's State License Board; and
- Must maintain a full-service office within seventy-five (75) miles of the District.

Responses. Interested Contractors are invited to submit a Response as described below, with one (1) original and five (5) copies of requested materials as well as a digital copy on a thumb drive, to: **San Leandro Unified School District, 14735 Juniper Street, San Leandro, CA 94579, Attn: Aaron Kerrigan, Director of Facilities and Operations.**

- **Prequalification Questionnaires must be received on or before _____, 20___, no later than 3:00 p.m.**
- **Proposals must be received on or before _____, 20___, no later than 3:00 p.m.**

Questions. Questions regarding this RFQ/P must be in writing and directed only to **Aaron Kerrigan at** akerrigan@slusd.us. Contractors are directed to not contact any other person regarding this RFQ/P.

Pre-Response Meeting (Mandatory). A pre-Response meeting will be held **at _____ A.M. on _____, 2017_, at _____, San Leandro, CA.** The District anticipates this meeting will last _____ (__) hours, but will continue the meeting until the District determines that it has answered all substantive questions. All participants are required to sign in. **Failure to attend or tardiness will render the Contractor ineligible to submit a Response.**

RFQ/P Addenda. If the District issues addenda to this RFQ/P, Contractors are solely responsible for and must acknowledge receipt of addenda in the Contractor's Proposal. Failure to acknowledge and respond to any addenda issued by the District may, in the District's sole discretion, render the Contractor's Proposal to be deemed non-responsive and may be rejected.

Thank you for your interest in working with the San Leandro Unified School District.

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1. General Information.

1.1. General Services. The District invites qualified Contractors to submit a Response related to its ability to provide the Services, as more fully indicated herein. Contractors must have extensive experience with the Office of Public School Construction ("OPSC"), the Uniform Building Code ("UBC"), Title 24 of the California Code of Regulations, and the Division of the State Architect ("DSA"). Contractors must have extensive experience in the construction of public school facilities, working with public school district representatives, working with architects, contractors and other school facility related consultants, and establishing project scope, project budgets, and bidding procedures under both the Public Contract Code's formal bidding process and under alternative construction delivery methods.

1.2. Lease-Leaseback Structure. The Project may 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.) The Contractor will be responsible for financing a portion of the construction of the Project. During construction, the District shall pay tenant improvement payments. Once the Project is complete, the Contractor shall lease the facilities constructed back to the District for a pre-determined monthly lease payment amount and lease period.

1.3. For each project, the District intends to use the Lease-Leaseback Agreement forms attached hereto as **Attachment 2** ("**Agreement**").

2. Prequalification.

2.1. Contractor Prequalification. All Contractors must submit by the dated indicated in this RFQ/P, a Prequalification Questionnaire attached hereto in **Attachment 3 ("Prequalification Questionnaire")** related to its ability to provide the Services as indicated herein. (Public Contract Code section 20111.6.)

2.2. Subcontractor Prequalification. In addition, all subcontractors with the following license classifications that the Contractor intends to list as a first-tier subcontractor are required to have been prequalified by the District: C-4, C-7, C-10, C-16, C-20, C-34, C-36, C-38, C-42, C-43, and/or C-46.

3. Contractors' Proposals. Contractors' Proposals 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 Contractors' Proposal shall **be no longer than seventy-five (75) pages, 8½" x 11" paper**, inclusive of résumés, forms, and pictures, and tabbed according to the numbering system reflected below. Please provide the District with a Proposal that includes the following:

3.1. Content of Proposals. Each Contractor's Proposal must be concise, well organized, and demonstrate Contractor's qualifications, and shall include the following items and information:

3.1.1. **Letter of Interest**. A dated Letter of Interest must be submitted, including the legal name of the Contractor, address, telephone, emails, and the name, title, and signature of the person authorized to submit the Proposal on behalf of the Contractor. The Letter of Interest should provide a brief statement of the Contractor's experience indicating the unique background and qualities of the Contractor, its personnel, and what will make the Contractor a good fit for work in the District.

3.1.2. **Table of Contents**. A table of contents of the material contained in the Proposal must follow the letter of interest.

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3.1.3. **Executive Summary**. An executive summary that outlines the Contractor's philosophy, along with a brief summary of the Contractor's qualifications.

3.1.4. **Proposed Personnel/Contractor 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. Indicate each person's availability to provide the Services.

3.1.5. **Contractor's History.** Provide a brief history of the Contractor, and, if a joint venture, of each participating entity.

3.1.6. **Contractor's Approach to Work.** Describe how the Contractor intends to work with the District's administration officials to perform the Services, including assistant superintendents, facilities directors, teachers and site principals, to develop management techniques and responses related to the unique challenges of the District's educational program requirements.

3.1.7. **Letters of References.** Include letters of reference or testimonials, if available. Contractor should limit letters of references or testimonials to no more than ten (10).

3.1.8. **Professional Development.** Indicate ongoing commitment to professional education of staff, total number of permanent employees, and any other data that may assist the District in understanding Contractor's qualifications and expertise.

3.1.9. **Schedule.** Discuss the Contractor's ability to prepare and meet achievable construction schedules for lease-leaseback projects, Contractor's schedule management procedures, and how the Contractor has successfully handled potential delays.

3.1.10. **Budget.** Discuss the Contractor's ability to manage costs and stay within budgets on comparable projects.

3.1.11. **Cost Savings / Value Engineering**. The District is seeking a Contractor that has direct experience and/or can demonstrate an aptitude to "value engineer" or analyze a project's plans, components, and features, and find more efficient and cost-effective methods or alternatives. Describe your Contractor's suggestions, recommendations, alternatives or other valuation determinations that the Contractor could implement on the Projects.

3.1.12. **Political Environment.** Describe Contractor's experience managing projects within political environments including facilitation of community involvement in the construction process.

3.1.13. **Local Outreach.** Describe the Contractor's knowledge and understanding of the local environment and a local presence for interacting with the District. Provide a plan for implementing local outreach and including local trade contractors.

3.1.14. **Local Community**. Describe the Contractors involvement in the community and community outreach.

3.1.15. **Contractor's Current Work Commitments**. Specify the current and projected workload of Contractor.

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3.1.16. **Additional Data**. Provide additional information about the Contractor as it may relate to Contractor's Proposal.

3.1.17. **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 Projects, or the District that may have a potential to conflict with Contractor's ability to provide the Services described herein to the District. Contractors cannot submit, propose, bid, contract, subcontract, consult, or have any other economic interests in the Project to which the Contractor may provide Services. The Contractor selected to provide the Services and any subsidiary, parent, holding company or affiliate of the selected Contractor, may not perform any construction work or submit a bid for the Project.

3.2. **Cost Proposal.**
The Project will be awarded based upon the Contractor's cost of performing services rather than a lump sum bid.

3.2.1. **Contractor's Cost of Performing Services.** Please complete the worksheet attached hereto as **Attachment 1.**

3.2.2. **Cost Savings / Value Engineering.** Please provide recommendations to the District to maintain or reduce the established budget. The District is seeking "value engineering" and analyses of the Project's plans, components, systems and features, to find more efficiency, cost-savings, or other value to the District.

3.3. **Agreement Form.** If a Contractor has any comments or objections to the Agreement attached as hereto as **Attachment 2** to this RFQ/P, it shall provide those comments or objections in its Proposal. **PLEASE NOTE: The District will not consider any substantive changes to the form of Agreement if they are not submitted at or before the time the Proposal is due.**

4. **District's Evaluation / Best Value Selection Process**. The District shall evaluate Firms' Responses based on a best value determination process

4.1. **Criteria for Best Value Selection Process.** The District wishes to retain Contractors that have the financial strength, management and expertise to deliver a Project within a proposed schedule and within an established budget. The Contractor will be selected based on qualifications and demonstrated competence that include relevant experience with California public school construction, with State of California's School Facilities Program, and a proven track record for cost-efficient and timely construction projects.

4.2. **Scoring.** The following table indicates how the District will score steps 1 – 4. The scoring and criteria for all steps are included in **Attachment 4** to this RFQ/RFP. Only Firms that receive the minimum qualification points as required at each step will move to the next step.

STEP 1: Scoring of Prequalification Questionnaire	**Minimum qualification points required in STEP 1 for Firms to proceed to STEP 2:** **36** (Total maximum possible points at the end of STEP 1 is **52**.)

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The District will only go to STEPS 2 & 3 for Firms with the required minimum score after STEP 1.	
STEP 2: Scoring of Proposal	**Minimum qualification points required in STEP 2 and STEP 3 <u>COMBINED</u> for Firms to proceed to STEP 4: <u>250</u>**
STEP 3: Scoring of References	(Total combined maximum possible points at the end of STEPS 2 & 3 is **<u>310</u>**.)
The District will only interview Firms that have the required minimum score after STEPS 2 & 3.	
STEP 4: Scoring of Interviews	**Minimum qualification points required in STEP 4 to be considered for the Project. <u>100</u>** (Total maximum possible points from the interview is **<u>140</u>**.)

4.3. During the evaluation of the Responses, contact shall only be through the individual identified in the RFQ/P. Firms shall neither contact nor lobby evaluators during the evaluation process. Attempts by a Firm to contact and/or influence the District may result in disqualification of that Firm.

4.4. The District reserves the right to contract with any Contractor responding to this RFQ/P, to reject any Response as non-responsive, and not to contract with any Contractor for the Services described herein. The District makes no representation that participation in the RFQ/P process will lead to an award of a contract or any consideration whatsoever. The District reserves the right to seek Responses from or to contract with any Contractor not participating in this process. The District shall in no event be responsible for the cost of preparing any Proposal.

4.5. All Proposals will become the property of the District and subject to the California Public Records Act, Government Code sections 6250, et seq. Those elements in a Proposal 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 Contractor that indiscriminately identifies all or most of its Proposal 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 Proposal marked "Confidential," "Proprietary," or "Trade Secret," the Contractor agrees, by submission of its Proposal, 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.

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Attachment 1

PROJECT(S) DESCRIPTION

[DESCRIBE HERE THE HVAC MOD PROJECT]

CONTRACTOR'S COST OF PERFORMING SERVICES:

The construction cost estimate for this Project is _____ **dollars ($_____)** ("Construction Cost Estimate"). Please use this estimate for purposes of calculating Contractor's Cost of Performing Services on the worksheet below.

Subcontractors	**Bare Cost**	**Sub's OH&P**	**Total**
Sheet Metal & Duct Work Fab.& Install	$	$	**$**
Plumbing	$	$	**$**
Electrical	$	$	**$**
Concrete	$	$	**$**
Equipment Rental	$	$	**$**
Other	$	$	**$**
Total			**$**

Preliminary Services		
	Review of design documents	$_____
	Value engineering	$_____
	Constructability review	$_____
	Budgeting	$_____
	Phasing plan	$_____
	GMP Estimation	$_____
	Other (identify item) _____	$_____
General Conditions / General Requirements		
The costs for, without limitation, all expenditures for labor, equipment and materials for the items identified therein that are necessary for the proper management of the Project, and shall include all costs paid or expenditures incurred by the Contractor for permits, taxes, and all contributions, assessments and benefits, holidays, vacations, retirement benefits, and incentives, whether required by law or collective bargaining agreements or otherwise paid or provided by Contractor to its employees.	Project manager	$_____
	Project engineer	$_____
	Project superintendent	$_____
	Foreman	$_____
	Clerical	$_____
	Safety officer/coordinator	$_____
	Vehicles	$_____
	Trailer	$_____
	Communications	$_____
	Office equipment/supplies	$_____
	Security	$_____
	Temporary utilities	$_____
	Toilets	$_____
	Dust control (erosion control)	$_____
	City/other fees to permit or entitle construction	$_____
	Submittals, shop drawings	$_____
	Miscellaneous	$_____
	Other (identify item) _____	$_____

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	Other (identify item) _____	$_____
	Other (identify item) _____	$_____
	Other (identify item) _____	$_____
Additional Items		
	Bonds / Insurance (Do not include in General Conditions)	$_____
	Mark-Up Fee	$_____
	Overhead & Profit (If not part of Mark-Up Fee)	$_____
	Other (identify item) _____	$_____
	Other (identify item) _____	$_____

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Attachment 2

LEASE LEASEBACK AGREEMENT

[ATTACH HERE THE LLB CONTRACT DOCUMENTS WE PROVIDED TO THE DISTRICT.]

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Attachment 3

PREQUALIFICATION QUESTIONNAIRE

[ATTACH HERE THE DISTRICT'S FORM OF PREQUALIFICATION DOCUMENTS.]

CONTRACTOR (OR "FIRM") INFORMATION		
Contractor's company name:		
Address:		
Telephone:		
Mobile telephone:		
E-mail:		
Years in business under current company name:		
Years at the above address:		
Types of work performed with own forces:		
Gross revenue of the Firm for the past three (3) years:		
$	$	$
Submit an audited or reviewed financial statement for the past two (2) full fiscal years. A letter verifying availability of a line of credit may also be attached; however, it will be considered as supplemental information only, and is not a substitute for the required financial statement.		
Name of license holder exactly as on file with the California State License Board:		
License classification(s):		
License Number(s):		
License expiration date(s):		
Department of Industrial Relations registration number (Per Labor Code section 1725.5):		
Number of years license holder has held the listed license(s):		
Number of years Contractor has done business in California under contractor's license law:		
Number of years Contractor has done business in California under **current** Contractor's license:		
Has your Firm changed name(s) or license number(s) in the past five (5) years? (Y / N). If "yes", explain on a separate signed sheet, including the reason for the change.		
Has there been any change in ownership of the Firm at any time in the past five (5) years? **NOTE**: A corporation whose shares are publicly traded is not required to answer this question. (Y / N). If "yes", explain on a separate signed sheet, including the reason for the change.		
Is the Firm a subsidiary, parent, holding company, or affiliate of another construction firm? **NOTE**: Include information about other firms if one firm owns ten percent (10%) or more of another, or if an owner, partner, or officer of your Firm holds a similar position in another firm. (Y / N). If "yes", explain on a separate signed sheet, the name of the related company(ies) and the percent ownership.		
Indicate the form of Contractor's firm (type of business entity): ____ Individual ____ Sole Proprietorship ____ Partnership ____ Limited Partnership ____ Corporation, State: _____		

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____ Limited Liability Company
____ Joint Venture
____ Other: _____

List the following for each corporation officer, general partner, limited partner, owner, etc. (as applicable) for the Contractor's type of entity. For joint ventures, include this information for each entity in the joint venture and the percent ownership of each joint venture. Attach all additional information on separate signed sheets as needed.

Name	Position	Years with Co.	% Ownership

Identify every construction firm, contractor and/or construction management firm that the Contractor or any person listed above has been associated with (as officer, general partner, limited partner, owner, RMO, RME etc.) at any time during the **past five (5) years** ("Associated Firm"). Include all additional references and/or information on separate signed sheets. NOTE: For this question, "owner" and "partner" refers to ownership of ten percent (10%) or more of the business, or ten percent (10%) or more of its stock if the business is a corporation. include all additional information on separate signed sheets as needed.

Name of Person at Associated Firm	Name of Associated Firm	Contractor's License No. of Associated Firm	Dates of Person's Participation with Associated Firm

CONTRACTOR'S BONDING COMPANY (SURETY) INFORMATION

Name(s) of bonding company(ies) your Firm has utilized over the past five (5) years (not broker or agency):

Address(es) of those bonding company(ies):

Number of years Contractor has been with those bonding company/surety:

Name of broker/agent:

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Address of broker/agent:
Telephone number of broker/agent:
E-mail of broker/agent:
Contractor's total current bonding capacity: $

CONTRACTOR'S INSURANCE INFORMATION

Name of insurance company(ies) your Firm has utilized over the past five (5) years (not broker or agency):
Address of those insurance company(ies):
"Best" rating(s) for those insurance company(ies):

Number of years Contractor has been with those insurance company(ies):

Name of broker/agent:
Address of broker/agent:
Telephone number of broker/agent:
E-mail of broker/agent:
Contractor's current insurance limits for the following types of coverage:

Commercial General Liability	Combined Single Limit (per occurrence)	$
	Combined Single Limit (aggregate)	$
Product Liability & Completed Operations	(aggregate)	$
	(per occurrence)	$
Automobile Liability – Any Auto	Combined Single Limit (aggregate)	$
Automobile Liability – Any Auto	Combined Single Limit (per occurrence)	$
Employers' Liability		$
Builder's Risk (Course of Construction)		

Workers' Compensation Experience Modification Rate for the past five (5) premium years:

(1) Current year:	(2)	(3)
	(4)	(5)

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QUESTIONS

Pass/Fail Questions (Essential Criteria)

1.	Has your Firm contracted for and completed construction of a minimum of: • **Four** (**4**) California K-12 public school district construction projects, • Each with a value of at least **$500,000,** and • All within the past **five (5) years**? (Please circle one). **NOTE**: You **must** list these projects in the "**Contractor Project References**" Section.	YES NO NO = cannot prequalify
2.	Does your Firm currently hold all contractors' license(s) necessary to perform the work and have those license(s) been consistently active for at least five (5) years without revocation or suspension? (Please circle one).	YES NO NO = cannot prequalify
3.	Has your Firm or an Associated Firm been found non-responsible, debarred, disqualified, forbidden, or otherwise prohibited from performing work and/or bidding on work for any public agency within California within the past five (5) years? (Please circle one).	YES NO YES = cannot prequalify
4.	Has your Firm or an Associated Firm defaulted on a contract or been terminated for cause by any public agency on any project within California within the past five (5) years and, if so and if challenged, has that default or termination been upheld by a court or an arbitrator? (Please circle one).	YES NO YES = cannot prequalify
5.	Has your Firm or an Associated Firm or any of their owners or officers been convicted of a crime under federal, state, or local law involving: (1) Bidding for, awarding of, or performance of a contract with a public entity; (2) Making a false claim(s) to any public entity; or (3) Fraud, theft, or other act of dishonesty to any contracting party within the past **ten (10) years**? (Please circle one).	YES NO YES = cannot prequalify
6.	Has a performance bond surety for your Firm or a performance bond surety for an Associated Firm had to: (1) Take over or complete a project, (2) Supervise the work of a project, or (3) Pay amounts to third parties, related to construction activities of your Firm or an Associated Firm within the past five (5) years? (Please circle one).	YES NO YES = cannot prequalify



If you answered:
"NO" to questions 1-2 or
"YES" to questions 3-6, then STOP.
You are not eligible for prequalification at this time.

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Scored Questions		
1.	Has your Firm paid liquidated damages pursuant to a contract for a project with either a public or private owner within the past five (5) years? (Please circle one). If YES, explain and indicate on separate signed sheet(s) the project name(s), damages(s), and date(s).	YES NO
2.	Has your Firm paid a premium of more than one percent (1%) for a performance and payment bond on any project(s) within the past five (5) years? (Please circle one). If YES, explain and indicate on separate signed sheet(s) the project name(s), the premium amount(s), and date(s).	YES NO
3.	Has any insurer had to pay amounts to third parties that were in any way related to construction activities of your Firm within the past five (5) years? (Please circle one). If YES, explain and indicate on separate signed sheet(s) the project name(s), the amount(s) paid, and date(s).	YES NO
4.	Has your Firm's Workers' Compensation Experience Modification Rate exceeded 1.0 at any time for the past five (5) premium years? (Please circle one). If YES, explain and indicate on separate signed sheet(s) the EMR(s) and the applicable date(s).	YES NO
5.	Has there been a period when your Firm had employees but was without workers' compensation insurance or state-approved self-insurance within the past five (5) years? (Please circle one). If YES, explain and indicate on separate signed sheet(s) the reason(s) for not having this insurance and the applicable date(s).	YES NO
6.	Has your Firm declared bankruptcy or been placed in receivership within the past five (5) years? (Please circle one). If YES, explain and indicate on separate signed sheet(s) the type of bankruptcy, the Firm's current recovery plan, and the applicable date(s).	YES NO
7.	Has your Firm been denied bond coverage by a surety company, or has there been a period of time when your Firm had no surety bond in place during a public construction project when one was required within the past five (5) years? (Please circle one). If YES, provide details on a separate signed sheet indicating the date(s) when your Firm was denied coverage and the name of the company or companies which denied coverage; and the period(s) during which you had no surety bond in place.	YES NO
8.	Has a project owner, general contractor, architect, or construction manager filed claim(s) in an amount exceeding $50,000 against your Firm, or has your Firm filed claim(s) in an amount exceeding $50,000 against a project owner, general contractor, architect, or construction manager in the past five (5) years? If YES, explain and indicate on separate signed sheet(s) the project name(s), claim(s) and the date(s) of claim(s).	YES NO

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9.	Has your Firm or an Associated Firm been cited and/or assessed any penalties for non-compliance with state and/or federal laws and/or regulations, including public bidding requirements and Labor Code violations, within the past five (5) years? If "YES," indicate on separate signed sheet(s) the project name(s), violation(s), and date(s) of citation(s) and/or assessment(s).	YES NO
10.	Has your Firm been cited and/or assessed penalties by the Environmental Protection Agency, any air quality management district, any regional water quality control board, or any other environmental agency within the past five (5) years? If "yes," indicate on separate signed sheet(s) the project name(s), violation(s), and date(s) of citation.	YES NO
11.	Has CAL OSHA and/or federal Occupational Safety and Health Administration cited and assessed penalties against your Firm, including any "serious," "willful" or "repeat" violations of safety or health regulations within the past five (5) years? If "yes," indicate on separate signed sheet(s) the project name(s), violation(s), and date(s) of citation. If the citation was appealed and a decision has been issued, state the case number and the date of the decision.	YES NO
12.	Has your Firm been required to pay either back wages or penalties for its failure to comply with California's prevailing wage laws, with California's apprenticeship laws or regulations, or with federal Davis-Bacon prevailing wage laws within the past five (5) years? If "yes," indicate on separate signed sheet(s) the project name(s), the nature of the violation(s), the name and owner of the project(s), the number of employees who were initially underpaid and the amount of back wages and penalties that your Firm was required to pay.	YES NO
13.	Does your Firm require **weekly**, documented safety meetings to be held for construction employees and field supervisors during the course of a project?	YES NO
14.	Provide the name, address and telephone number of the apprenticeship program (approved by the California Apprenticeship Council) from whom you intend to request the dispatch of apprentices to your Firm for use on any public work project for which you are awarded a contract by the District.	

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CONTRACTOR PROJECT REFERENCES

List **ALL** projects in which your Firm has participated as a contractor or first-tier subcontractor during the past **five (5) years** with a Firm contract value of more than **$500,000.**

- You may limit your response to the **thirty (30)** most-recently completed projects, but you **must** include at least the **four (4)** most recent California K-12 public school projects with a contract value of more than **$500,000** performed by your Firm.
- Include all information indicated below on separate signed sheets as necessary, and explain or clarify any response as necessary

Project name/identification:
Project address/location:
Project owner, contact person, and telephone:
Project architect name and telephone number:
If contractor was a subcontractor on the project, name of general contractor and telephone number:
Indicate if the project was under lease-leaseback, design-build, design-bid-build or other delivery structure:
Scope of work:
Original completion date:
Date completed:
Initial contract value (as of time of bid award):
Final contract value:

CERTIFICATION

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct:

Date: _____

Proper Name of Contractor: _____

Signature: _____

By: _____ (Print Name)

Title: _____

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Attachment 4

SCORING FOR BEST VALUE SELECTION PROCESS

STEP 1 – PREQUALIFICATION SCORING

1. **Confirm Firm has passing answers for the "Pass/Fail Questions."**

2. **Confirm Firm has submitted the required financial statements**. If not, notify Firm in writing that its Proposal is non-responsive for failing to include the required financial statements.

3. **Score the "Evaluated Questions."**

Topic/Question	*Scoring & Max. Poss. Score*		Score
1. Liquidated Damages	No = 8 points; Yes = 0 points	8	
2. Surety Premium	No = 2 points; Yes = 0 points	2	
3. Insurer Pay	No = 2 points; Yes = 0 points	2	
4. EMR	No = 2 points; Yes = 0 points	2	
5. Workers' Comp.	No = 2 points; Yes = 0 points	2	
6. Bankruptcy	No = 8 points; Yes = 0 points	8	
7. Denied Bond	No = 8 points; Yes = 0 points	8	
8. Filed Claims	No = 8 points; Yes = 0 points	8	
9. Labor Code Citations	No = 2 points; Yes = 0 points	2	
10. EPA Citations	No = 2 points; Yes = 0 points	2	
11. OSHA Citations	No = 2 points; Yes = 0 points	2	
12. Prevailing Wage Penalties	No = 2 points; Yes = 0 points	2	
13. Safety Meetings	Yes = 2 points; No = 0 points	2	
14. Apprenticeship Program	Listed = 2 points; None listed = 0 points	2	
Total Score		**52**	

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STEP 2 – PROPOSAL SCORING

The following scoring will be used in evaluating the Firm's Proposal responses to the following criteria, which will be determined by review all portions of the Proposal, including the "Content of Proposals" section of the RFQ/P and the "Contractor Project References" section of the Prequalification Questionnaire.

Item	Description	Maximum Qualification Points	Firm's Qualification Points
1. Personnel / Subconsultants	Firm's team members, especially team leaders, demonstrate applicable experience and expertise to perform Services in response to District's needs.	40	
2. Approach to Work	Firm demonstrates how it intends to work with the District and develop management techniques related to the District's educational program requirements.	30	
3. LLB Projects	Firm demonstrates past experience and expertise with LLB process.	20	
4. Preliminary Services	Firm demonstrates past experience and expertise to perform all Preliminary Services.	**[N/A]**	
5. Cost Savings / Value Engineering	Firm demonstrates past experience and expertise to perform value engineering services for the Projects.	20	
6. Budget	Firm demonstrates past experience and expertise to manage costs and stay within budgets on LLB projects.	20	
7. Schedule	Firm demonstrates ability on LLB projects to prepare and meet achievable construction schedules schedule management procedures, and successful handling of potential delays.	10	
8. Political Environment	Firm demonstrates experience managing projects within political environments including facilitation of community involvement in the construction process.	5	
9. Local Outreach	Firm demonstrates knowledge and understanding of the local environment and describes local outreach plan including local trade contractors.	5	
10. Local Community	Firm demonstrates involvement in community and efforts at community outreach.	5	
11. Environmental	Firm indicates its past experience performing in an environmentally responsible manner.	5	
12. Firm Education	Firm describes its commitment to ongoing professional education.	5	
13. Conflict of Interest	Any potential or actual conflict of interest.	5	
14. Current Work Commitments	Firm describes current and projected workload.	5	
15. Additional Information	Strength of additional information provided by Firm.	5	
	Total Score MAXIMUM POINTS	**180**	

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STEP 3 – REFERENCES SCORING

1. Contacts references from the Firm's response to the "**Contractor Project References**" section of the Prequalification Questionnaire and scores those responses.

2. Fill out the information in Section I of the Qualification Evaluation – Reference Form and then call the contact person.

3. Ask the questions in Section II of the Qualification Evaluation – Reference Form. Ensure that you obtain the information regarding whether the Firm's performance in that area was "unsatisfactory," "below average," "average" or "above average." Assign the corresponding score for each answer in Section III.

4. Complete Section III of the Qualification Evaluation – Reference Form with the information received during the call.

5. Use a separate Qualification Evaluation – Reference Form for each call.

6. Make three (3) complete reference calls for each Firm.

7. Enter the "Total Score for This Project" of all the Qualification Evaluation – Reference Forms for that Firm into an "Averaging" Worksheet.

Sample "Averaging" Worksheet for 3 reference calls per Firm – See next page	
"Total Score For This Project" from first call	
"Total Score For This Project" from second call	
"Total Score For This Project" from third call	
Total	
Total divided by three (÷ 3) **[DIVIDE SCORE BY NUMBER OF CALLS]** This is the score for the Firm for the References Step in the evaluation process.	

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STEP 3 – REFERENCES SCORING (CONTINUED)

References – Qualification Evaluation Form

Section I - General Project Information

Name of Firm:	Total Contract Costs:
	Contract Start/End Dates:
Project Title:	Actual Completion Date:
Scope of Work:	
Name of Public Agency:	Telephone Number of Contact Person:
Name of Contact Person:	Date and Time of Interview of Contact Person:
Architect Firm:	Principal Architect in Charge of Project:

Section II – Telephone Interview Questions

1. **Quality of Work**. Were there quality-related problems on the project? Were these problems attributable to the Firm? Was the Firm cooperative in trying to resolve problems? If not, provide specific examples. **Please rate the Firm with respect to quality of work as either unsatisfactory, below average, average, or above average**.

   _____

   _____

2. **Scheduling.** Rate the Firm's performance with regard to adhering to project schedules. Did the Firm meet the project schedule? If not, was the delay attributable to the Firm? **Please rate the Firm with respect to scheduling as either unsatisfactory, below average, average, or above average.**

   _____

   _____

3. **Subcontractor (Project) Management.** Rate the Firm's ability to manage and coordinate subcontractors (if no subcontractors, rate the Firm's overall project management). Was the Firm able to effectively resolve problems? If not, provide specific examples. **Please rate the Firm with respect to project management as either unsatisfactory, below average, average, or above average.**

   _____

   _____

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4. **Change Orders**. Rate the Firm's performance with regard to change orders and extras. Did the Firm unreasonably claim change orders or extras? Were the Firm's prices on change orders and extras reasonable? If not, provide specific examples. **Please rate the Firm with respect to change orders as either unsatisfactory, below average, average, or above average.**

   _____

   _____

5. **Working Relationships**. Rate the Firm's working relationships with other parties (i.e. owner, designer, subcontractors, etc.). Did the Firm relate to other parties in a professional manner? If not, provide specific examples. If not, provide specific examples. **Please rate the Firm with respect to working relationships as either unsatisfactory, below average, average, or above average.**

   _____

   _____

6. **Responsiveness**. Rate the Firm's responsiveness to telephone calls, emails, meetings, requests for action, etc. Did the Firm respond to inquiries promptly and substantively? If not, provide specific examples. **Please rate the Firm with respect to responsiveness as either unsatisfactory, below average, average, or above average.**

   _____

   _____

7. **On-Site Firm Staff**. Rate the Firm's on-site staff relating to their management of the site, communication and interaction with owner's staff, and familiarity with project scope and status. **Please rate the Firm's on-site staff as either unsatisfactory, below average, average, or above average.**

   _____

   _____

8. **Paperwork Processing**. Rate the Firm's performance in completing and submitting required project paperwork (i.e. submittals, drawings, requisitions, payrolls, etc.). Did the Firm submit the required paperwork promptly and in proper form? If not, provide specific examples. **Please rate the Firm with respect to paperwork processing as either unsatisfactory, below average, average, or above average.**

   _____

   _____

9. **Value Engineering**. Rate the Firm's performance in analyzing designed building features, systems, equipment, and material selections for the purpose of achieving essential functions at the lowest life cycle cost consistent with required performance, quality, reliability, and safety. **Please rate the Firm with respect to providing value engineering services as either unsatisfactory, below average, average, or above average.**

   _____

   _____

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Section III - Numerical Rating

If the contact person rates the Firm unsatisfactory in any area, please attempt to provide written comments in Section II to explain the rating(s) assigned.

Firm's Name: _____

	Unsatisfactory	Below Average	Average	Above Average	Rating
1. Quality of Work	0	5	15	20	
2. Scheduling	0	5	10	15	
3. Subcontractor (Project) Mgt.	0	5	10	15	
4. Change Orders	0	5	10	15	
5. Working Relationship	0	5	10	15	
6. Responsiveness	0	5	10	15	
7. On-Site Staff	0	5	10	15	
8. Paperwork Processing	0	2	5	10	
9. Value Engineering	0	2	5	10	
				Total Score for This Project	

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STEP 4 – INTERVIEW SCORING

Firms meeting or exceeding the minimum total qualification points through Step 3 will be invited to interview with the District. The subject matter for the interview will be at the District's discretion but shall include, at a minimum, the following topics.

Item	Maximum Qualification Points	Qualification Points
1. Current Project: Firm's articulation of how it will construct the Project, its ideas related to constructability, and other construction-specific ideas, concerns, or related issues (i.e. schedules, budgets, subcontractor selection, etc.).	**45**	
2. Past Projects/Experience: Firm's articulation of Firm's history, education, and background; Firm's experiences working with similar, past projects; issues faced and how addressed (i.e. claims, bonding/surety involvement, owner relations, citations, etc.); and questions, concerns, and highlights from Proposal.	**35**	
3. Overall Ability and General Suitability. Firm's articulation of its overall skills, ability to complete the Project, and general suitability for the District's purposes (i.e. implementation of District policies and procedures, compliance with District Programs, political atmosphere, additional information, etc.)	**30**	
4. Personnel/Leadership: Firm's articulation of its Project-designated personnel, leadership, subcontractor relations, apprenticeship program, etc.	**30**	
SUBTOTAL QUALIFICATION POINTS FROM STEP 4	**140**	

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