



# **Piedmont Unified School District**

## **Request For Proposals Regarding Facilities Master Planning Services**

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**RFP Deadline:** May 12, 2015

Constance Hubbard  
Superintendent  
Piedmont Unified School District  
760 Magnolia Avenue  
Piedmont, CA 94611-4047



## **Request For Proposals Regarding Facilities Master Planning Services**

The Piedmont Unified School District ("District") is soliciting proposals from experienced architectural firms that can help with the planning, development and related work associated with a Long-Range Facilities Master Plan ("Facilities Master Plan").

The purpose of this Request for Proposals ("RFP") is to obtain information that will enable the District to select an ideal candidate that can effectively partner with the District to perform various components of a Facilities Master Plan. Each Architectural firm responding to this RFP should be prepared and equipped to provide complete and detailed Facilities Master Planning services on behalf of the District in an expeditious and timely manner and enable the District to meet critical time deadlines and schedules.

If your firm is interested in providing Facilities Master Planning services for or on behalf of the District, please submit a detailed summary of your firm's qualifications in accordance with this RFP. The deadline for receipt of PROPOSALS is 4:00 PM, on May 12, 2015 ("Response Deadline"). Note that proposals delivered after the Response Deadline may not be considered. A minimum of five (5) hard copies and one (1) electronic copy on a CD or flash drive in PDF format of your proposal should be submitted to:

**Michael Brady**  
**Assistant Superintendent, Business Services**  
**Piedmont Unified School District**  
[mbrady@piedmont.k12.ca.us](mailto:mbrady@piedmont.k12.ca.us)

All submittals will become the property of the District. Information in the proposals will become public property and subject to disclosure laws. The District reserves the right to make use of any information or ideas in the proposals, reject any or all applicants, and to waive any irregularities or informalities in the RFP and RFP process. All costs associated with the preparation or submissions of qualifications, for this RFP are solely the responsibility of the candidates.

In order for the District to make an informed decision regarding selecting an architectural firm among responsible and responsive candidates, your proposal must contain the following described elements or evidence that the architectural candidate meets or exceeds the requirements stated hereto in this RFP.

## 1. SCOPE OF SERVICES

### 1.1 Meet with Facilities Master Planning Committee ("FMPC")

This task involves meeting with appropriate team members on the FMPC to obtain critical information on the existing facilities and conditions assessment.

The FMPC shall meet throughout the Facilities Master Plan process. Participants in the FMPC might include members from the following groups:

- Parent Advisory Committee and School District Principals
- Facilities Committee
- Board of Trustees
- Superintendent's Cabinet
- School District Staff

### 1.2 Community Outreach

In light of the significant community interest in the Facilities Master Plan process, this task involves selected architectural firm ("Architect") assisting with Community Input Forums allowing the community to weigh in on the Facilities Master Plan process. Community Input Forums will be held to provide community members information and seek feedback from them on facility needs.

### 1.3 Develop Conditions (Needs) Assessments (*see 1.3.1 & 1.3.2 below*)

#### 1.3.1 Evaluation of Current School District Facilities

This task involves Architect completing an evaluation of all of the School District's existing sites and their condition to understand the basis for growth/reduction at each site based upon the direction of the curriculum as defined in the Educational Specifications. The District recently conducted a thorough structural and accessibility analysis of its buildings as part of a \$70M seismic safety, accessibility, and modernization program between 2006 and 2012. A number of these documents are archived on the District's Bond Program website ([www.pusdbond.org](http://www.pusdbond.org)). Access to additional District architectural drawings will be made available to firms that sign a non-disclosure agreement.

Architect will evaluate each site, determine areas for possible growth/expansion/consolidation, the context of the schools, the visual definition of the campus and how the outdoor spaces function together. Once this overall diagrammatic evaluation of the existing facilities has been completed, Architect would begin to develop the schematic level Facilities Master Plan by utilizing statistical data and curriculum direction that we have gathered to form a basis for the determination of the needs of each campus.

#### 1.3.2 Develop Future Facilities Needs and Alternatives

This task involves Architect assisting with prioritizing needs of the School District, exploring community and joint use needs, preparing individual site Facilities Master Plans, providing recommendations for energy savings, incorporating deferred maintenance needs into each campus, facilitating and documenting FMPC input and assembling all material for the FMPC.

### **1.4 Educational and Maintenance Specifications**

This task involves Architect assisting with updating and/or establishing new Educational Specifications to reflect the District's facilities standards and educational goals. Architect will also assist the District with updates to the Strategic Plan (*as needed*), develop Equalization Standards, Sustainable Construction Guidelines, Maintenance and Operations Standards, and IT Standards.

### **1.5 Preparation of a Final Digital Facilities Master Plan**

This task involves Architect assisting with the preparation of a final digital Facilities Master Plan (in Adobe PDF format) that can be uploaded to the School District's website and can be easily accessed by the School District's constituents.

### **1.6 Facilitation of the FMPC Presentation**

This task involves Architect assisting with the facilitation of FMPC presentation/discussion of findings and recommendations to the Governing Board in a Board workshop setting.

### **1.7 Presentation to the Governing Board**

After receiving feedback from the FMPC presentation described in 1.6, Architect will assist with presentation of the draft Facilities Master Plan (including estimates, schedules, and possible funding scenarios) to the Governing Board for feedback prior to finalization and approval by the Board.

## **2. PROPOSAL FORMAT**

PROPOSALS should be typewritten, concise, straightforward, and must address each requirement and question. Submittals shall be signed by an authorized individual or officer of the firm submitting the statement. In addition, submittals are required to have the following:

- Materials must be in 8 ½ x 11 format.
- Table of Contents to include:
  - c Cover Letter
  - c Business Information
  - c Project Approach
  - c Relevant K-12 Experience
  - c References
  - c Piedmont Unified School District Vision
  - c Project Team Summary (including sub-consultants)
  - c Fees
  - c Litigation History
  - c Insurance

**An Architectural firm's proposal shall at a minimum, include all of the following:**

### **2.1. Cover Letter**

A cover letter containing an introduction, including the name, address, telephone number, and e-mail address of the person or persons authorized to represent the institution regarding all matters related to the proposal. Cover letter should also include number of years in business and date firm was established. The letter shall be signed by the individual authorized to bind the respondent to all statements and representations made therein and to represent the authenticity of the information presented.

### **2.2. Business Information**

Provide the following information for your firm and all sub-consultants:

- Company Name
- Address
- Telephone
- Fax
- Website URL (if applicable)
- Name and email of main contact
- Federal Tax I.D. Number
- License information including number and expiration date, if applicable
- Business Structure (Corporation, Partnership, etc.)
- A brief description and history of the firm
- Number of employees (licensed professionals, technical support, etc.)
- Number of current projects and present workload and where possible, projected workload for the period in question, for those individuals proposed to work the District's project
- Location of office where the bulk of services solicited will be performed
- Proof of Errors and Omission insurance and coverage amounts

### **2.3. Relevant K-12 Project Experience**

Provide information about prior services/designs prepared by your firm on at least five (5) prior Facilities Master Plans at the K-12 level. Include the following information:

- Briefly state the relevance for each project included for consideration in this RFP.
- Specify role of firm or individual if work was not exclusively completed by the firm (i.e. joint venture, etc.)
- Provide a list of the following for each project:
  - Project name and location
  - Beginning and end dates of project
  - Main program elements
  - School District and name of contact with contact information

- Key individuals of the firm involved and their roles in the project
- Any sub-consultants that worked with the firm.

## **2.4. References**

Provide the following reference information for your firm:

- Provide five (5) K-12 references who you have worked with in the past five (5) years. Four of the references can be for existing clients. However, one of the references must be for a client you no longer do work for. Please provide a written explanation as to why you no longer have a relationship with that client.
- Provide two (2) Program Manager or Construction Manager references that include a reference for construction administration services.
- Provide authorization of the "Architect" and all principals thereof to allow the District to make oral and/or written inquires of all references listed, regarding your qualifications, performance, reasonableness of fees and charges, and quality of final results.

## **2.5. Piedmont Unified School District Vision**

Explain how the District's Vision will be incorporated into all architectural services. Additionally, please describe how a local presence will be established and maintained.

## **2.6. Project Team Summary**

Identification of Architectural firm's project team and their specific expertise, experience, and resources to ensure suitable architectural services. Indicate key team members, years with the firm, resumes, and California Registration Numbers, as applicable.

## **2.7. Fees**

Provide your fee schedule. If you plan to propose charging any costs for additional services, describe the types of costs to be covered and a proposed fee schedule. Be sure to include overhead and other special charges.

## **2.8. Litigation History**

Provide a comprehensive five-year summary of the firm's litigation, arbitration and negotiated/settled

## **2.9. Insurance**

Provide proof of coverage for the types and amounts of insurance carried by the Architect, including CGL, automobile liability, Workers Compensation, and Professional Liability Coverage. Minimum limits of insurance required by the District for consultant and sub-consultants are as follows:

- Commercial General Liability Insurance (CGL) with a combined single limit of not less than \$1,000,000 each occurrence/\$1,000,000 in the annual aggregate.
- Business Automobile Liability Insurance with a combined single limit of not less than \$1,000,000 each accident.

- Professional Liability (Errors & Omissions) Insurance with a limit not less than \$1,000,000 each occurrence/\$2,000,000 in the annual aggregate.
- Workers' Compensation Insurance as required by the State of California.

### **3. CRITERIA FOR SELECTING PRE-QUALIFIED CONSULTANTS**

Although not necessarily exhaustive of the criteria to be utilized by the District, the District intends to use the following evaluation criteria in selecting an Architect to assist with the Facilities Master Plan. The evaluation criteria are as follows:

#### **3.1. Timeliness and Completeness of Proposal**

To receive maximum consideration, Architectural firm's PROPOSAL must be received by the Response Deadline. In addition, Architectural firm's PROPOSAL will be evaluated with respect to organization, clarity, completeness, and responsiveness to this RFP.

#### **3.2. Technical Qualifications and Competence**

This includes experience, expertise, and familiarity with applicable laws and requirements for school facility projects in general and Facilities Master Planning in particular.

#### **3.3. Record of Past Performance**

This includes work quality, completion of work on schedule, cost controls, contracts held with other K-12 school districts over the last 5 years as well as the response of references provided by the Architectural firm or any other references identified by the District.

#### **3.4. Approach to Work**

This includes project management and coordination methodologies, prioritization analysis and study approaches and ability to work cohesively with various stakeholders involved in long-term planning efforts.

#### **3.5. Fees**

This includes total fee amount proposed by Architect firm, any additional costs for sub-contractors required for completion of Facilities Master Plan and Architectural firm's policies respecting the pass-through to the District of overhead costs.

The District reserves the right to request that some or all of the respondents submit additional written information and/or that they consent to be interviewed by selected District personnel and/or representatives.

The District also reserves the right to: (i) extend the Response Deadline, (ii) send out additional RFPs, (iii) reject any and all submittals, and/or (iv) provide for mechanisms for Architectural firms to become Pre-Qualified to provide architectural services for the District. The District is not obligated to explain any deficiencies in their proposal, nor accept requests for justification from firms not selected.

#### 4. POLICIES APPLICABLE TO CONTRACT AWARDS

Acceptance by the District of any proposals submitted pursuant to this RFP shall not constitute any implied intent to enter into a contract for Architectural firms services. All work to be performed under any awarded contract must conform to the requirements of the District and, if applicable, the CDE and all other governmental agencies with jurisdiction.

#### 5. QUESTIONS REGARDING RFP PROCESS

Please call or email Michael Brady at 510-594-2717 or [mbrady@piedmont.k12.ca.us](mailto:mbrady@piedmont.k12.ca.us) if you have any questions. All questions must be submitted one (1) week prior to the Response Deadline.

**NOTE: Responders are cautioned to not contact members of the District’s Board of Trustees or any District staff. Failure to observe this criteria will result in responder disqualification.**

Interested firms should submit five (5) hard copies and one (1) electronic copy on a CD or flash drive in PDF format of the Response by May 12, 2015 at 4:00 PM to:

**Michael Brady**  
**Assistant Superintendent, Business Services**  
**Piedmont Unified School District**  
[mbrady@piedmont.k12.ca.us](mailto:mbrady@piedmont.k12.ca.us)

The District thanks you for your interest in providing services to the District and invites your Response hereto in accordance with the terms of this RFP.

#### 6. PRELIMINARY SCHEDULE

All dates are preliminary and subject to revision.

Date	Description
April 23, 2015	Release of RFP
May 2, 2015	Walk-through of District facilities
May 5, 2015	Deadline for submission of questions
May 12, 2015	Deadline for all submissions in response to the RFP
May 18-21, 2015	Interviews
May 27, 2015	Board meeting to select Architectural Firm