



**Rancho Santa Fe School District**

**REQUEST FOR  
QUALIFICATIONS/ PROPOSALS  
FOR  
ARCHITECTURAL SERVICES**

**October 26, 2017**



**Rancho Santa Fe School District**

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**REQUEST FOR QUALIFICATIONS (RFQ) / REQUEST FOR PROPOSALS (RFP)  
ARCHITECTURAL SERVICES**

**DATED: October 26, 2017**

Rancho Santa Fe School District (hereinafter District) is requesting proposals for architectural services from interested firms for updates to the facilities master plan and needs assessments, in addition to possible school design of modernization, new construction, and/or other capital projects. It is the intention of the District to identify a list of firms that can provide full service Architectural Services to the District including electrical, mechanical, civil and structural engineering for design of school facilities.

The Request for Qualifications (RFQ) / Request for Proposals (RFP) **must be received by 2:00 PM on November 14, 2017**, at Rancho Santa Fe School District, in the Business Services Department, located at 5927 La Granada, Rancho Santa Fe, CA 92067. Attention: Bradley Johnson, Chief Business Officer.

**A. INTRODUCTION**

The Rancho Santa Fe School District has provided quality educational programs and services for many thousands of students since opening in 1905. The Rancho Santa Fe School District currently serves approximately 641 students in grades K-8 and the vision of the District is Inspiration through Revolutionary Education. The District's values express our commitment to learning through active participation in an engaging, inspiring, and rigorous educational experience. Our caring community promotes mutual respect, interdependence, global awareness and service to others. We strive to have exceptional character and are personally responsible, accountable, and aware of our impact on others.

**B. SUBMITTAL INFORMATION**

The following format has been prepared as the guide for the development of the proposal in response to the RFQ/RFP. The District is very interested in the project team with which it will be working. All individuals that will be directly involved with the project should be identified and represent the firm in all discussions and interviews.

**1. Executive Summary:**

- a) Legal name of the architectural firm.
- b) Type of firm (individual, corporation, etc.).
- c) Provide a brief description of your architectural firm, including number of years in business.
- d) Number of employees (company-wide).
- e) Number of employees located in San Diego County.
- f) Date firm established.
- g) California Business License Number.
- h) Tax Identification Number.
- i) Name of the project architect who will serve as the School District's project contact throughout the project(s).



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- j) Address, telephone, and fax number of the office that will be primarily responsible for providing services for the proposal.

This introduction cover letter must be signed by the authorized officer of the firm.

### 2. Table of Contents

Provide a table of contents of the material contained in the Statement of Qualifications.

### 3. Staffing Resources

- a) Identify up to three (3) persons that will be principally responsible for working with the District. Indicate the role and responsibility of each individual. If the Proposer is chosen as a finalist, these principal individuals must attend the interview and in-person presentation.
- b) Provide a brief resume of individuals on the team that will be working directly with the District. These resumes must represent projects over the last 5 years. Please also indicate number of years employed by firm.

### 4. Project Experience and References (Company, Employees)

- a) Please provide at least four recent (over last five years) clients for whom your firm has provided full service architectural work similar to what is being requested in this RFQ/RFP **with particular emphasis where possible on public school projects**. Please include the following information as demonstrated below:

- |                             |  |
|-----------------------------|--|
| 1) Year(s):                 | i.e. 2014-2015   |
| 2) Institution:             | i.e. District  |
| 3) Contact Person:          | i.e. Smith, John   |
| 4) Title:                   | i.e. Director of Facilities                              |
| 5) Contact Phone Number:    | i.e. (619) 555-5555                                      |
| 6) Project Description:     | i.e. Modernization project conducted at XYZ High School. |
| 7) Dollar Value of Project: | i.e. \$1,000,000.00                                      |
| 8) Duration of Project:     | i.e. 9 Months  |

- b) If any of the following has occurred within the last five (5) years, please describe in detail:

- 1) Failure to enter into a contract or professional services agreement once selected.
- 2) Withdrawal of a proposal as a result of an error.
- 3) Termination or failure to complete a contract.
- 4) Debarment by any municipal, county, state, federal, or local agency.
- 5) Provide specific information on termination for default, litigation settled or judgments entered related to your firm, joint venture partners, or sub-consultants.
- 6) Conviction of the firm or its principals for violating a state or federal antitrust law by bid or proposal rigging, collusion, false claims, or restrictive competition between bidders or



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proposers, or conviction of violating any other federal or state law related to bidding or professional services performance.

- 7) Knowing concealment of any deficiency in the performance of a prior contract.
- 8) Falsification of information or submission of deceptive or fraudulent statements in connection with a contract.
- 9) Willful disregard for applicable rules, laws or regulations.

Information regarding any of the above may, at the sole discretion of the District, may be deemed to indicate an unsatisfactory record of performance.

c) **Technical Competence**

Provide a description of in-house resources (i.e. computer capabilities, software applications, modeling programs, electronic record keeping, Sharepoint, etc.) and ability to draw upon multi-disciplinary staff to address the services requested in this RFQ/RFP.

### **5. Fee Estimate Range/Terms**

Proposer must submit Fee Schedule per the attached Exhibit A in a separate, sealed envelope. A fixed fee or not-to-exceed fee shall be negotiated with the successful Proposer, should they be selected to perform the work. The contract term will be one (1) year with four one-year extensions, not to exceed a total of five years.

### **6. Selection Criteria**

The successful firms will demonstrate through the RFQ/RFP that the firm has the professional capability and resources to be a full service architect that can facilitate and oversee the planning (including updates to the facility master plan and needs assessments), design (including Prop 39 energy project design), bidding (alternative delivery methods may be used), construction, closeout and occupancy of the project, and work with state and local agencies where necessary. Please demonstrate:

- 1) Recent experience in facility master planning, school design for modernization, new construction, modular buildings, relocatables, school safety and/or other projects in California. Please describe the special strength your firm and team will bring to the project and how these strengths will set your firm apart from others. Identify proposed team in Exhibit C.
- 2) Ability of firm to meet short timelines with minimum plan errors or deficiencies. Explain your ability to get projects completed on time (timeliness of plans during design and administrative process during construction). What is your firm's experience in design and construction scheduling?
- 3) Demonstrate your ability to design within project budget. Demonstrative accuracy of cost estimates.
- 4) Describe your process for the review of shop drawings and submittals. What is your turn around time for distribution and review of same? How do you handle substitutions?



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- 5) Location of office and accessibility to project(s).
- 6) Use of energy savings and value engineering in design. How have your designs reduced construction costs?
- 7) Life cycle costing and maintenance durability analysis experience.
- 8) Current commitments and ability of firm to handle project(s).
- 9) Change Order Policy: How does your firm handle the change order process both with the Construction Manager and/or General Contractor and DSA? What method do you utilize to determine the validity and cost responsibility of a change order? What is your firm's change order history for similar projects on a percentage basis?
- 10) Level of computerization (CAD, BIM, etc) in office and with consultants. Explain use of technology in review and response to submittals, RFIs, change orders, as-builts, etc.
- 11) Thoroughness by firm in checking plans for errors and omissions/constructability reviews for design development and final construction drawings.
- 12) Satisfaction of previous clients in the firm's capacity and commitment to provide services to clients.
- 13) Experience working with project planning committees consisting of district staff, faculty, students, community members, Program Managers, and Construction Managers.
- 14) Experience in data, public address systems, communication systems, and other audio systems used in schools. How have your designs provided flexibility to meet changing technology needs without additional fees?
- 15) Cost of services. Cost to be provided on Exhibit A and B attached with this RFQ/RFP.
- 16) Project architect's experience in successful and timely approval of firms' projects through DSA, State Fire Marshall, and local agencies.
- 17) Project architect's knowledge and ability to work with applicable state laws and regulations and experience in processing plans and documents with the state agencies (CDE, DSA, OPSC, DTSC, etc.).
- 18) Ability to assist District and District's funding consultants in preparation of state funding applications; including site development cost work sheets, and/or other cost estimates as required by OPSC.
- 19) Communication - Ability to keep the District informed as to progress of work both during design and construction phases, including necessary changes during construction. Describe other means of effective communication between your firm and the district.
- 20) Quality Assurance: How does your firm assure that the highest quality of materials and construction techniques are being employed during various phases of construction?
- 21) Post Construction Follow-Up: What is the firm's role upon completion of construction? How, on previous school construction projects, have you handled punch list items and ensured that items function properly? How will the firm assist the District in enforcement of contractor's guarantees and warranties?
- 22) Maintenance Costs: how have your designs reduced district short-term and long-term maintenance costs?
- 23) Your experience with the different delivery methods i.e. Construction Management/Multiple Prime Construction, Design Bid Build, Lease-Leaseback, etc.



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### 7. Insurance

- a) A letter from insurance company indicating ability to provide insurance. Insurance requirements include the following:
- 1) A.M. Best financial rating of no less than A-:VII.
  - 2) Commercial General Liability Insurance: Commercial General Liability Insurance shall be at least as broad as Insurance Services Office General Liability Coverage (Occurrence Form CG 0001.) One Million Dollars (\$1,000,000) per occurrence for bodily injury, personal injury and property damage Two Million Dollars (\$2,000,000) aggregate.
  - 3) Automobile Liability Insurance: Automobile liability insurance shall be at least as broad as Insurance Services Office Form Number CA 0001 covering Automobile Liability, Code 1 (any auto). Two Million Dollars (\$2,000,000) for bodily injury and property damage each accident limit.
  - 4) Workers' Compensation and Employer's Liability Insurance: The respondent shall insure (or be a qualified self insured) under the applicable laws relating to workers' compensation insurance, all of their employees in accordance with the "Workers' Compensation and Insurance Act," Division IV of the Labor Code of the State of California and any Acts amendatory thereof. The respondent shall provide employer's liability insurance in the amount of at least One Million Dollars (\$1,000,000) per accident for bodily injury and disease.
  - 5) Professional Liability Insurance: The respondent shall provide professional liability insurance in the amount of at least Two Million Dollars (\$2,000,000) per claim and in the aggregate.
  - 6) All insurance will be in a form and with insurance companies acceptable to the District.
  - 7) Insurance carriers shall be qualified to do business in California and maintain an agent for process within the state.
  - 8) All insurance policies shall provide that the insurance coverage shall not be cancelled or reduced by the insurance carrier without thirty (30) days prior written notice to the District (10 day Notice for Cancellation due to non payment of premium is acceptable). Proposer agrees that it will not cancel or reduce said insurance coverage.
  - 9) Proposer agrees that if it does not keep the aforesaid insurance in full force and effect, District may either immediately terminate this agreement or, if insurance is available at a reasonable cost; District may purchase necessary insurance and pay, at Proposer's expense, the premium thereon.
  - 10) At all times during the term of the agreement, Proposer shall maintain on file with the District a certificate of insurance, on showing that the aforesaid policies are in effect in the required amounts. The policies shall contain an endorsement naming the District as an additional insured (except for the workers compensation and professional liability policies), providing that the policies cannot be cancelled or reduced, except on thirty (30) days written notice to the District (10-day Notice for Cancellation due to non-payment of premium is acceptable), and specifically stating that the coverage contained in the policies affords insurance pursuant to the terms and conditions set forth in this agreement. Proposer shall promptly file with the District Clerk such certificate or certificates.



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11) The insurance provided by the Proposer shall be primary to any coverage available to the District. The insurance policies shall include provisions for waiver of subrogation.

**8. Miscellaneous**

The RFQ/RFP shall not exceed twenty (20) pages, excluding front and back covers, tabs and appendices. Exhibits A, B, C and D **must be** included in the RFQ/RFP.

The individual or official of this firm who has the power to bind the firm contractually must sign the RFQ /RFP.

The RFQ /RFP preparation and associated direct costs are the sole responsibility of the Consultant and will not be reimbursed by the District.

**Ten (10) copies** of the RFQ /RFP shall be submitted, including an electronic copy. RFQ /RFP **must be received by 2:00 PM on November 14, 2017**, at Rancho Santa Fe School District, in the Business Services Department, located at 5927 La Granada, Rancho Santa Fe, CA 92067. Attention: Bradley Johnson, Chief Business Officer.

Submission of proposals by facsimile or e-mail is not acceptable. The Proposer is entirely responsible for the means of delivering the proposal to the appropriate office on time. Delays due to internal routing of misdirected proposals or due to verbal directions given by District staff shall be the responsibility of the Proposer. The proposal must be completed and delivered in sufficient time to avoid disqualification for lateness due to difficulties in delivery. **LATE PROPOSALS WILL NOT BE ACCEPTED.**

For directions to the office if needed: Call Hannah Clements at (858)-756-1141x116 or e-mail [hclements@rsf.k12.ca.us](mailto:hclements@rsf.k12.ca.us).

**C. QUESTIONS**

All questions, interpretations or clarifications, either administrative or technical **must be requested in writing via email** and directed to:

RANCHO SANTA FE SCHOOL DISTRICT  
Attn: Bradley Johnson [bjohnson@rsf.k12.ca.us](mailto:bjohnson@rsf.k12.ca.us)  
Chief Business Officer

**D. SCHEDULE**

The District anticipates the following time line for the process of selecting architectural teams:

<u>Action</u>	<u>Target Date</u>
1. Release of Request for Proposal	October 26
2. Last Day to Submit Questions (by email)	November 6



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4. Clarifications Issued by District	November 8
5. Deadline for Receipt of Proposals submitted on or before 2:00 p.m.	November 14
6. Notification of Finalist(s)	November 21
7. Interview of Finalist(s)	Week of November 27
8. Approval of Award – Tentative	December 7, 2017

### **E. EVALUATION & ACCEPTANCE OF STATEMENT OF QUALIFICATIONS / REQUEST FOR PROPOSALS**

Proposers are encouraged to follow the format of the RFQ/RFP in order to facilitate District review.

The District reserves the right to reject any and all RFQ/RFP, to amend the RFQ/RFP and the process itself, or to discontinue the process at any time.

All material submitted which has not been clearly designated as proprietary information becomes the property of the District and may be returned only at the District's option.

### **F. EVALUATION AND AWARD OF CONTRACT**

Upon selection of a firm(s), the District will endeavor to negotiate a mutually agreeable professional services agreement with the selected firm(s). In the event that the District is unable to reach agreement, the District will proceed, at its sole discretion, to negotiate with the next firm(s) selected by the District. The District reserves the right to contract for services in the manner that most benefits the District including awarding more than one contract if desired.

### **G. CONFIDENTIAL INFORMATION**

It is understood that proposals made in response to the RFQ/RFP may contain technical, financial, or other data, the public disclosure of which would cause substantial injury to the architect's competitive position or that would constitute a trade secret. To protect this data from disclosure, the architect should specifically identify the pages of the proposal that contain such information by properly marking the applicable pages and by inserting the following notice in the form of its proposal.

### **H. NOTICE**

The data on pages of the proposal response identified by an asterisk (\*) or marked along the margin with a vertical line, contain information, which are trade secrets, disclosure of which would cause substantial injury to the architect's competitive position. The architect requests that such data be used only for the evaluation of its proposal, but understands that disclosure will be limited to the extent that the District determines is proper under federal, state, and local law.





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### **I. ACCEPTANCE OF PROPOSAL CONTENT**

The contents of the proposal of the successful firm will become contractual obligations. Failure of the successful firm to accept these obligations in a subsequent contractual agreement may result in cancellation of the award.

### **J. DISTRICT FACILITIES AND RESOURCES**

The architect will be required to use his/her own office and facilities. Use of District facilities such as desks, telephone, and conference space will not be available. The District will provide staff as necessary for coordination. The architect will be required to be on site as necessary during the contract period as defined in the Owner Architect Agreement.

### **K. NON-APPROPRIATION OF FUNDS**

Any contract resulting from this RFQ/RFP is subject to appropriation of funds (by the School District Governing Board) for each fiscal year of services listed herein.

### **L. ADDITIONAL SERVICES**

The District may elect, at any time, to amend any contract awarded hereunder to require the selected firm to provide additional services. In this case, the selected firm and the District will agree mutually on the scope and fees associated with any additional services.

### **M. FINGERPRINTING**

The Architect and its consultants shall comply with Education Code section 45125.1 which stipulates that none of its employees that come in contact with District pupils have been convicted of a violent felony listed in Penal Code section 667.5(c) or a serious felony listed in Penal Code section 1192.7(c). Proposer acknowledges that required fingerprinting and clearances shall occur prior to those employees performing work on the District campus wherein those employees would come in contact with pupils.

### **N. TOBACCO AND DRUG-FREE WORKPLACE POLICY**

The District and all District projects are "tobacco" and "drug free" workplaces and, as such, require that all persons on District Property be subject to the requirements mandated by California Government Code section 8350, et seq. when on Project site.

### **O. NON-DISCRIMINATION**

The District does not discriminate on the basis of race, color, national origin, religion, age, ancestry, medical condition, disability, gender or any other protected status in consideration for an award of contract.



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**P. INDEMNIFICATION**

Any contract for architectural services the District may enter into following this RFQ shall include a clause obligating the architect to indemnify and defend the District to the fullest extent of the law. Any such agreement also shall address the Architect's responsibility project delays and construction change orders to the extent such are caused by the Architect's negligence, recklessness, or willful misconduct.



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**EXHIBIT "A"**

**PROPOSED ARCHITECT FEE SCHEDULE**

<b>CONTRACT AMOUNT</b>	<b>NEW CONSTRUCTION PERCENTAGE RATE</b>	<b>MODERNIZATION PERCENTAGE RATE</b>
<b>First \$500,000</b>		
<b>Next \$500,000</b>		
<b>Next \$1,000,000</b>		
<b>Next \$4,000,000</b>		
<b>Next \$4,000,000</b>		
<b>Excess of \$10,000,000</b>		

**\* THE ABOVE FEES ARE TO BE APPLICABLE TO A VARIETY OF DELIVERY METHODS**



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**EXHIBIT "B"**

**ADDITIONAL SERVICES – ROSTER OF RATES**

<b>POSITION</b>	<b>HOURLY RATE</b>
<b>Principal Architect</b>	
<b>Project Architect / Senior Associate</b>	
<b>Civil Engineering Coordinator Architect</b>	
<b>Senior Staff AutoCAD / Job Captain</b>	
<b>Interim Staff AutoCAD</b>	
<b>Assistant Staff AutoCAD / Drafting</b>	
<b>Clerical</b>	
<b><u>List additional below:</u></b>	



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**EXHIBIT "C"**

**TO BE COMPLETED BY ALL CONSULTANTS**

Consultant Name: \_\_\_\_\_

Identify those Businesses with which you intend to subcontract; the work to be subcontracted, the percentage of work to be subcontracted and the type of subcontractant i.e. Small, Local, Emerging, Disabled Veteran or other/decline to state. Definition of these categories can be found on the accompanying form.

<b>"A"</b> <b>BUSINESS NAME</b>	<b>"B"</b> <b>WORK SCOPE</b>	<b>"C"</b> <b>PERCENTAGE</b>	<b>"D"</b> <b>TYPE OF SUBCONSULTANT</b>

DUPLICATE THIS FORM AS NECESSARY



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**EXHIBIT "D"**

**TO BE COMPLETED BY ALL CONSULTANTS AND SUBCONSULTANTS**

Consultant/Subconsultant Name: \_\_\_\_\_

I declare under penalty of perjury that my business is (check all that apply):

- Small Business – A Small Business is one whose gross sales are less than \$1 million annually.
- Local Business – A Business headquartered in San Diego County.
- Emerging Business – An Emerging Business is one who has been business less than five years. I started my business on \_\_\_\_\_.
- Disabled Veteran-Owned Business – A Disabled Veteran-Owned Business is one that has a current certification from a California public agency. Certification must be attached.
- Other Businesses – A business, which does not meet any of the other definitions above, or for which the consultant or subconsultant declines to state its category.

If it is determined that the information contained herein is not true and correct, it could potentially eliminate the Proposer from consideration for work on Rancho Santa Fe School District Projects.

Consultant/Subconsultant: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

Name, Title: \_\_\_\_\_

Signature: \_\_\_\_\_