



# **REQUEST FOR PROPOSALS**

## **FOR**

### **RFP 2019-20.06**

## **BOND STRATEGY ADVISORY SERVICES**

Request for Proposals Issued  
Friday July 19, 2019

Deadline for Submittal of Proposals  
Friday, August 2, 2019, 2 PM

Interviews will be scheduled on  
Tuesday, August 6, 2019, between 1 and 5 PM

Ellen Rebosura, Purchasing Coordinator  
Pleasanton Unified School District  
4750 1st Street  
Pleasanton, CA 94566

## **I. INTRODUCTION**

The voters of the Pleasanton Unified School District ("District" or "PUSD") passed a \$270 million General Obligation Bond measure (Measure I1) on the November 8, 2016 ballot to address facility needs, safety improvements and building modernizations to support 21st-century education. The District received the 1st issuance of bond proceeds (Issuance A) in October 2017. The District is scheduled to receive the proceeds from the 2nd issuance (Issuance B) in September 2019. Issuance C is scheduled for 2022 and Issuance D is scheduled for 2024. There is a potential opportunity for another bond measure in 2020 that would extend the expiring tax rate from the previous bond measures from 1988/1997. The District is seeking proposals from qualified firms to serve as a bond strategy advisor which could advise the District regarding a communication plan to educate the community about the new bond measure. Proposals should be submitted as requested below and should include all elements described under "Contents of Proposal."

The overall objective of this Request for Proposal is to permit firms the opportunity to submit their relevant school experience, client references and proposed fees for consideration. The successful firm(s) shall be required to enter into the District's standard professional services contract before commencing work. Such contract would be subject to termination by the District at any time.

The contract shall commence August 14, 2019, subject to subsequent Board approval. The District will not guarantee any minimum level of activity or business. No exclusive rights are granted, or are intended to be granted, pursuant to any award under this request for proposals and the agreement(s) with the provider(s) of service(s) shall be only for services for such matters as the District, in its sole discretion, shall deem appropriate.

## **II. BACKGROUND**

The Pleasanton Unified School District (PUSD) is a suburban school district serving 14,500 students from preschool through grade twelve. PUSD has nine elementary schools, three middle schools, two comprehensive high schools, an alternative education program, an adult education program, a special education preschool, and a before- and after-school child care program. Like many California school

districts, it faces significant challenges in identifying sufficient funding to maintain or expand its facilities and upgrade infrastructure.

### **III. INSTRUCTIONS**

Interested firms are invited to submit one original signed proposal and one electronic copy on USB drive. The proposal shall be made in the format provided and the complete proposal, together with any and all additional materials, shall be enclosed in a sealed envelope addressed and delivered no later than 2 PM on Friday, August 2, 2019, to the following address:

Ellen Rebosura, Purchasing Coordinator  
Pleasanton Unified School District  
4750 1st Street  
Pleasanton, CA 94550

The sealed envelope shall be marked on the outside with the words "Bond Strategy Advisory Services RFP." It is the Proposer's sole responsibility to ensure that its proposal is received prior to the scheduled closing time for receipt of proposals. No corrected or resubmitted proposals will be accepted after the deadline.

**Email copies of the proposal received prior to the submission deadline are acceptable, provided that the original hard copy is provided within five working days.** Proposals may be emailed to [erebosura@pleasantonusd.net](mailto:erebosura@pleasantonusd.net).

This Request for Proposals does not commit the District to award a contract or pay any costs incurred in the preparation of a proposal responsive to this request. The District reserves the right to accept the proposal that it considers to be in the best interest of the District. The District further reserves the right to accept all or part of any proposal or to cancel in part or in its entirety this Request for Proposals.

All requirements must be addressed in your proposal. Non-responsive proposals will not be considered. All proposals, whether selected or rejected, shall become the property of the District.

Questions related to this RFP should be submitted in writing to Ellen Rebosura, [erebosura@pleasantonusd.net](mailto:erebosura@pleasantonusd.net), no later than Tuesday, July 26, 2019, by 12 noon.

Answers will be posted on the District's website at <http://go.pleasantonusd.net/bids> no later than Wednesday, July 29, 2019, by 12 noon.

#### **IV. SCOPE OF WORK**

It is anticipated that the successful firm will be asked to provide all or some of the following pre-election planning and community outreach services. **NO POLITICAL ADVOCACY SERVICES ARE TO BE PERFORMED AT DISTRICT EXPENSE.**

1. Coordinate or prepare informational (**non-advocacy**) materials to assist District in informing community members about how the District receives funding, the programs supported by that funding, and the reasons why the District has elected to place a general obligation bond ballot measure on the ballot.
2. Advise the District regarding communication methods which will enable the community to be well-informed regarding District issues.
3. Perform such other functions normally contemplated to be within the scope of a public information consultant.

#### **V. CONTENTS FOR PROPOSALS**

In order for a proposal to be considered, it must be clear, concise, complete, well organized and demonstrate both respondent's qualifications, and its ability to follow instructions. The quality of answers, not length of responses or visual exhibits is important in the proposal.

The proposal shall be organized in the format listed below. Respondents shall read each item carefully and answer each of the following items accurately to ensure compliance with District requirements. The firm's response to each lettered item below should be indexed with a separate tab in the proposal.

**A. Submittal Letter**

Include the RFP's title and submittal due date, the name, address, fax number and telephone number of the responding firm. Include a contact person and corresponding email address. The letter shall state that the proposal shall be valid for a 60-day period and that the staff proposed is available immediately to work on this project. The person authorized by the firm to negotiate a contract with the District shall sign the cover letter.

**B. Description of Firm**

This section should provide an overview and history of your firm, and its services it has provided to public entities in California. This section should also clearly convey the firm's understanding of the nature of the work described above in Section IV; the general approach the firm will use in its ability to provide the requested services; and how the District will benefit from the firm's expertise.

**C. References**

This section should identify at least three (3) similar projects for school districts that the firm has completed. Include the names of individuals familiar with your work who can be contacted by District staff.

**D. Team**

Please provide the names of the employees in your firm who would be assigned to this contract, provide résumés, and give a brief description of each person's relevant experience. Please indicate who the primary contact will be and who will be responsible for the day to day work with the District. If junior staff are to be assigned to the engagement, explain their role, how they are supervised, and how their work product is reviewed by more senior staff. Also, explain what percentage of the services will be provided by junior as compared to senior-level staff.

**E. Fees**

Please provide your firm's proposed fee and billing arrangements for this engagement, broken out for each item in Section IV (Scope of Work) to the extent possible. If applicable, include the hourly rates of the individuals identified in (E) above. If your firm has discounted rates for governmental entities such as the District, please provide these rates.

**F. Conflict of Interest**

Does your firm have any existing relationships with the Pleasanton Unified School District? If so, please describe.

**G. Sub-Contracting**

Does your firm "subcontract" any work? If so, what are the names and addresses of these firms? Describe in detail the work these firms would be expected to perform.

**H. Insurance**

Does your firm carry errors and omissions insurance coverage? If so, please state the policy limits of such coverage and provide evidence of coverage.

**VI. SELECTION CRITERIA**

Firms submitting proposals are advised that all proposals will be evaluated to determine the firm deemed most qualified to meet the needs of the District. The District reserves the right to weigh its evaluation criteria in any manner it deems appropriate. The selection criteria will include, but not be limited to, the firm's knowledge, experience, references, and proposed fees.

Interviews will be conducted on Tuesday, August 6, 2019, between the hours of 1 and 5 PM. Please reserve this time on your calendar.