

“EXHIBIT A”

Santa Monica-Malibu Unified School District
2828 4th Street, Santa Monica, CA 90405
September 7, 2018

REQUEST TO PREQUALIFY AND FOR STATEMENT OF QUALIFICATIONS FOR PRELIMINARY AND CONSTRUCTION SERVICES (LEASE LEASEBACK) FOR SAMOHI DISCOVERY BUILDING PROJECT

Request for Qualifications (“RFQ”). The Santa Monica-Malibu Unified School District (“**District**”) is requesting submission of:

- A prequalification application (“**Prequalification Application(s)**”) through Quality Bidders, if contractor is not currently prequalified with the District; and
- A statement of qualifications (“**SOQ**”)

(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 **SAMOHI DISCOVERY BUILDING PROJECT** (“**Project**”) as described in **Attachment 1** (“**Project Description**”) pursuant to a Lease Leaseback structure in accordance with Education Code section 17406.

This request is not a formal request for bids or an offer by the District to contract with any Contractor responding to this RFQ. The District intends to issue a request for proposals to those Contractors that meet the minimum qualification points pursuant to this RFQ. Contractors that intend to submit a Response must:

- Hold a Class B Contractors License which is current, valid, and in good standing with the California Contractors State License Board;
- Prequalify through the District’s prequalification process; and
- **Have completed at least four (4) Lease Leaseback projects with an original contract value of \$25,000,000 or more during the past ten (10) years.**

Estimated Project Cost: \$110,000,000 - \$120,000,000.

Estimated Contract Time: 24 Months.

Project Labor Agreement: In accordance with Education Code section 17407.5, the Project is subject to the District’s Project Labor Agreement (“PLA”) (Exhibit L to Master Facilities Lease, attached hereto as a portion of **Attachment 5**). The PLA provides that as a condition of accepting a bid, the Contractor will abide by the terms and conditions of the PLA relating to, among other things, hiring practices, wage and rate benefits, union representation, union recognition, hours of work, overtime shifts, holidays, grievances, disputes, safety and working conditions. The PLA also provides that there will be no strikes, labor shutdown or slowdown, and no lockout. The Contractor and all subcontractors are required to abide by the terms and conditions of the PLA.

Responses. Interested Contractors are invited to submit a Response as described below.

- **Prequalification Applications must be completed through Quality Bidders** by the date indicated in the RFQ Schedule. The District highly recommends all Contractors complete the Prequalification Application as soon as possible to expedite Quality Bidders’ evaluation.
- **SOQs must be received** by the date indicated in the RFQ Schedule, with one (1) original and five (5) copies of requested materials as well as a digital copy on a thumb drive, to: Sheere Bishop – Director of Procurement and Contract Management - Consultant, Facility Improvement Projects Office, Santa Monica-Malibu Unified School District, 2828 4th Street, Santa Monica, CA 90405. The District reserves the right to waive any immaterial irregularities or informalities in any Response or in this RFQ process.
- **Responses must be received on or before October 8, 2018, no later than 3:00 p.m.**

Questions. Questions regarding this RFQ must be in writing and directed only to Sheere Bishop at smbishop@smmusd.org. Subject line of email to reference "RFQ SAMOHI Discovery Building Question". Contractors are directed to not contact any other person regarding this RFQ.

Pre-Response Meeting (Mandatory). A pre-Response meeting to address the RFQ will be held at **9:00 A.M. on September 13, 2018, at the Facility Improvement Projects Office, 2828 4th Street, Santa Monica, CA 90405**. The District anticipates this meeting will last 1 hour 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 Questions/Addenda. If the District issues addenda to this RFQ, Contractors are solely responsible for and must acknowledge receipt of addenda in the Contractor's SOQ. Responses to the questions received, along with any addenda to this RFQ will be posted to the FIP website at <http://fipcontractors.smmusd.org/fip-office-website.aspx>. It is the sole responsibility of each proposing firm to access the addenda and any responses to questions from the FIP website. If you are unable to access the FIP website, please contact Sheere Bishop at the email address listed above. Failure to acknowledge and respond to any addenda issued by the District may, in the District's sole discretion, render the Contractor's SOQ to be deemed non-responsive and may be rejected.

RFQ Schedule. The District has set the following RFQ Schedule that all Contractors must adhere to. The District reserves the right to modify this RFQ Schedule and will issue an addendum if it modifies this RFQ Schedule.

Event / Occurrence	Date / Deadline
District Issues RFQ	9/7/18
Pre-Response Meeting (Mandatory)	9/13/18 @ 9:00 A.M.
Deadline for Contractors to submit questions regarding this RFQ, the plans and specs	9/21/18 no later than 3:00 P.M.
Deadline for Contractors to complete and submit Prequalification Applications (if not already prequalified with the District)	9/24/18
District to respond to Contractors' questions regarding this RFQ, the plans and specs	9/28/18
District to issue Final Addendum	10/1/18
District to issue listing of Pre-Qualified Contractors (Step 1)	10/1/18
Deadline for Contractors to submit SOQ	10/8/18 no later than 3:00 P.M.
District to issue list of Contractors qualified after (Steps 2 & 3)	10/15/18
District to interview qualified Contractors (Step 4)	Week of 10/22/18
District to identify pool of Contractors qualified to submit proposal after (Step 4)	Week of 10/29/18

Thank you for your interest in working with the **Santa Monica-Malibu Unified School District**.

1. General Information.

- 1.1. **Construction Services.** The District invites qualified Contractors to submit a Response related to its ability to provide 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 and successfully working with public school district representatives, 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. **Scope of Services.** The selected Contractor for the Project must be willing and able to, in good faith, propose to construct the Project listed in **Attachment 1** if and when the District issues a request for proposals for the Project (“**Services**”), including the subcontractor procurement process that all Contractors are required to follow which will be detailed in the request for proposals. District will negotiate Project pricing with Contractors following the issuance of an RFP for the Project and prior to final GMP contract award. Those processes shall comply with the District’s subcontractor procurement process as indicated in **Attachment 4 (“Subcontractor Procurement Process”)**.
- 1.4. The District intends to use the Lease Leaseback Agreement forms for the Project attached hereto as **Attachment 5 (“Agreement”)**. Contractor will be required to substantially accept these forms for the Project solicited under this RFQ, including the indemnification provision(s) therein which encompass the subcontractor procurement process.

2. Prequalification.

- 2.1. **Contractor Prequalification.** Unless already prequalified with the District, Contractors must submit by the date indicated in this RFQ (at least 10 business days prior to the published date of receipt of Proposals), a Prequalification Application (“**Prequalification Application**”) in accordance with Public Contract Code section 20111.6. The District has contracted with Colbi Technologies, Inc. to provide a no-cost web-based process for prequalification called “Quality Bidders.” Contractors must complete and submit an on-line Prequalification Application found at www.qualitybidders.com by the date indicated in this RFQ. The District maintains a list of all prequalified contractors on its website at <http://fipcontractors.smmusd.org/fip-office-website.aspx>.
- 2.2. **Subcontractor Prequalification.** Pursuant to Public Contract Code section 20111.6, all mechanical, electrical, and plumbing subcontractors (contractors holding C-4, C-7, C-10, C-16, C-20, C-34, C-36, C-38, C-42, C-43, and C-46 licenses), regardless of the value of the work, must be prequalified as set forth therein. Those subcontractors must also be prequalified through Quality Bidders, but that subcontractor prequalification process will **not** be part of this RFQ step. The District will implement the subcontractor prequalification process when the District requests proposals for the Project and may, at that time, prescribe the dollar limit for each prequalified subcontractor for the Project.

3. **Contractor's SOQ.** The Contractor's SOQ must be concise, well-organized, and consecutively numbered on each page and must include the following information, using the following outline structure, except as may be otherwise directed. The Contractor's SOQ shall **be no longer than seventy-five (75) pages, on 8½" x 11" paper**, inclusive of résumés, forms, and pictures, and tabbed according to the numbering system reflected below. Each Contractor's SOQ must demonstrate Contractor's qualifications, and shall include the following items and information:
- 3.1. **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 SOQ 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.
 - 3.2. **Conflicts of Interest.** The proposing entity must affirmatively state that there are no known conflicts of interest or must disclose any potential conflict of interest involving any District employee, consultant, or member of the Board of Education. Subsequent discovery of an undisclosed actual conflict of interest shall be adequate ground for the District to terminate the agreement for cause. By submitting a response, the submitting entity consents to termination for cause in the event that an undisclosed actual conflict of interest is discovered. ***Failure to include this statement in the cover letter shall be grounds for immediate disqualification of the submitting entity without consideration of its submittal.***
 - 3.3. **Table of Contents.** A table of contents of the material contained in the SOQ must follow the letter of interest.
 - 3.4. **Executive Summary.** An executive summary that outlines the Contractor's philosophy, along with a brief summary of the Contractor's qualifications.
 - 3.5. **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 and time/years with Firm/Contractor.
 - 3.6. **Budget.** Discuss the Contractor's ability to manage costs and stay within budgets on comparable Lease Leaseback projects, including budgeted and utilized contractor and owner contingencies.
 - 3.7. **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.
 - 3.8. **Contractor's Approach to Work.** Describe how the Contractor intends to work with the District's representatives, design professionals, project inspector, subcontractors, and other Project participants to develop management techniques and responses related to the Project.
 - 3.9. **Contractor's Experience with Lease Leaseback.** Describe the Contractor's experience performing projects pursuant to a Lease Leaseback structure. In addition, the Contractor must provide the information requested on **Attachment 3** for the **ten (10) most recent** Lease Leaseback projects Contractor has performed or is performing. **Your Firm must have completed at least four (4) Lease Leaseback projects with an original contract value of \$25,000,000 or more within the past ten (10) years to qualify for this Project with the District.**

- 3.10. Ability to Perform Preliminary Services.** The form of Agreement attached hereto as **Attachment 5** includes a scope of work for Preliminary Services. Describe the Contractor’s ability and past experience performing those Preliminary Services.
- 3.11. 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 Firm’s experience in recommending and implementing project cost savings/value engineering.
- 3.12. Local Outreach.** Describe the Contractor’s knowledge and understanding of the local environment and Contractor’s local presence. Describe Contractor’s plans for providing local businesses and/or local trade contractors opportunities to participate in the Project.
- 3.13. Project Labor Agreement.** Describe the Contractor’s involvement on previous projects on which a project labor agreement, project stabilization agreement, community workforce agreement, or similar arrangement was in place.
- 3.14. Environmental.** Describe the Contractor’s experience and ability to ensure that it can perform its construction activities in an environmentally responsible manner. Also describe the Contractor’s experience in constructing either CHPS and/or LEED certified buildings.
- 3.15. Contractor’s Current Work Commitments/Project Limitations.**
 - 3.15.1. Specify the current and projected workload of Contractor. If applicable, provide a statement of all recent, current, or anticipated contractual obligations that relate in any way to similar work for the District that may have a potential to impede Contractor’s ability to provide the Services described herein to the District.
 - 3.15.2. Indicate Contractor’s limitations or restrictions related to the size of project that Contractor can contract for and can effectively perform. Provide a current letter from Contractor’s Surety confirming ability to provide required bonding for this project and bonding capacity.
- 3.16. Additional Data.** Provide additional information about the Contractor as it may relate to Contractor’s SOQ.
- 3.17. 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.
- 3.18. Form of Agreement.** If a Contractor has any comments or objections to the Agreement attached as hereto as **Attachment 5** to this RFQ, it shall provide those comments or objections in its Response. **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 Response is due.**
- 3.19. Compensation.** The District is not asking in this RFQ that Contractors provide a specific proposal for the Project or for a final price to construct the Project. District will negotiate Project pricing with Contractors following the issuance of an RFP for the Project and prior to final GMP contract award. At this time, Contractors must provide the following information only:

Item	Amount
Staffing that would be part of Preliminary Services	

Project Manager (hourly rate)	\$ _____
Constructability Reviewer (hourly rate)	\$ _____
Estimator (hourly rate)	\$ _____
Scheduler (hourly rate)	\$ _____
Staffing that would be part of General Conditions	
Project Executive (hourly rate)	\$ _____
Project Manager (hourly rate)	\$ _____
Project Superintendent (hourly rate)	\$ _____
Project Engineer (hourly rate)	\$ _____
Mark-up on subcontractor work	_____ %
Mark-up on self-performed work	_____ %
Fee / overhead & profit (as a percentage of direct costs)	_____ %
Bond & insurance cost (as a percentage of direct costs)	_____ %
Other costs (identify in sufficient detail for evaluation, either as a lump sum or a percentage of direct costs)	\$ _____ or _____ %

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 Lease Leaseback 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 2** to this RFQ. Only Firms that receive the minimum qualification points as required at each step will move to the next step.

STEP 1: Scoring of Prequalification Application	Only Contractors that are prequalified by the District will proceed to STEP 2.
STEP 2: Scoring of SOQ	Total maximum possible points is 380.

STEP 3: Scoring of References	Total maximum possible points is 145. Minimum qualification points required in STEP 2 and STEP 3 <u>COMBINED</u> for Firms to proceed to STEP 4: <u>420</u>
The District will interview only those Firms that have the required minimum score after STEPS 2 & 3.	
STEP 4: Scoring of Interviews	Total maximum possible points is 600. Minimum qualification points required in STEP 4 to be considered for the Project: <u>480</u>

- 4.3. Notification.** The District will notify Firms of their status after each Step. Firms that do not receive the required minimum qualification points from STEP 2, may request in writing a debriefing, which will be restricted to no more than two (2) persons from the Firm to have a discussion with the District staff regarding that Firm’s Response. All debriefings will take place after award and contract execution via a conference call or an in-person meeting, at the District’s sole discretion.
- 4.4. Restrictions on Lobbying and Contacts.** Beginning with the date of issuance of this RFQ and concluding on the date of execution of the contract for this project, no person or entity submitting a response to this RFQ, nor any person, officer, employee, consultant, agent, or representative of the same shall through any means contact any employee of the District, any Board of Education member, any consultant for the District (including any project architect or any member of the program management team), or any member of any District-appointed committee to engage in any discussion regarding (1) this RFQ, (2) the selection process or (3) award of this contract. ***Any such contact shall be grounds for the immediate disqualification of the submitting entity without consideration of its response.***
- 4.5.** The District reserves the right to contract with any Contractor responding to this RFQ for the Project, 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 process will lead to an award of 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 SOQ.
- 4.6.** All SOQs will become the property of the District and subject to the California Public Records Act, Government Code sections 6250, et seq. Those elements in an SOQ 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 SOQ 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 an SOQ marked “Confidential,” “Proprietary,” or “Trade Secret,” the Contractor agrees, by submission of its SOQ, 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.

Attachment 1

SAMOHI DISCOVERY BUILDING PROJECT DESCRIPTION

PROJECT DESCRIPTION:

The Project consists of site grading, construction of a new building, construction of a pool, and landscape and hardscape constituting approximately 265,000 square feet of improvements. The construction will include subterranean parking, surface parking, road construction, various utilities, a distribution center, approximately 28 classrooms, an aquatic center including a 50-meter pool, rooftop solar, rooftop learning areas, commissary kitchen, cafeteria, special education suites, computer labs, commons, administrative spaces, various appurtenant spaces, and exterior improvements.

Construction is scheduled to begin in early 2019.

Attachment 2

SCORING FOR BEST VALUE SELECTION PROCESS

STEP 1 – PREQUALIFICATION

1. Contractor must be prequalified by the District in accordance with this RFQ.

STEP 2 – SOQ SCORING

The following scoring will be used in evaluating the Firm’s responses to the following criteria, which will be determined by review of all portions of the Response, including the “Contractor’s Response” section of the RFQ and the “Contractor Project References.”

Item	Description	Maximum Qualification Points	Firm’s Qualification Points
1. District Format: Letter of Interest Table of Contents Executive Summary: 3.1; 3.2; 3.3	Firm has complied with the District’s requirements for formatting, including a Letter of Interest identifying the Firm with a brief statement of the Firm’s experience, personnel, and what will make the Firm a good fit for the Project; Table of Contents; and Executive Summary outlining the Firm’s philosophy and qualifications.	5	
2. Proposed Personnel / Project Team 3.4	Firm’s team members, especially team leaders, demonstrate applicable experience and expertise to perform Services for the Project.	50	
3. Budget 3.5	Firm demonstrates past experience and expertise to manage costs and stay within budget on LLB projects.	50	
4. Schedule 3.6	Firm demonstrates ability on LLB projects to prepare and meet achievable construction schedules, schedule management procedures, and successful handling of potential delays.	50	
5. Approach to Work 3.7	Firm demonstrates how it intends to work with District representatives and other Project participants and develop management techniques related to the Project requirements.	40	
6. Prior/On-Going Lease Leaseback Projects 3.8	Firm demonstrates experience and expertise with Lease Leaseback process.	30	
7. Ability to Perform Preliminary Services 3.9	Firm demonstrates experience and ability to perform Preliminary Services similar to those required for this Project.	30	
8. Cost Savings / Value Engineering 3.10	Firm demonstrates past experience and expertise to perform value engineering services for the Project.	20	
9. Local Outreach 3.11	Firm demonstrates knowledge and understanding of the District’s local outreach policies and describes local outreach plan including local trade contractors.	10	
10. Project Labor Agreement 3.12	Firm demonstrates knowledge and understanding of the District’s Project Labor Agreement for the Project.	10	

11. Environmental 3.13	Firm demonstrates experience and ability to perform its construction activities in an environmentally responsible manner and in accordance with CHIPS and/or LEED certification requirements.	10	
12. Current Work Commitments 3.14	Firm describes current and projected workload.	10	
13. Additional Information 3.15	Strength of additional information provided by Firm.	10	
14. Firm Education 3.16	Firm describes its commitment to ongoing professional education.	5	
15. Compensation 3.18	Firm's compensation information provided is competitive and within the District's past experience for compensation for similar construction projects.	50	
	Total Score MAXIMUM POINTS	380	

STEP 3 – REFERENCES SCORING

1. Contacts references from the Firm's response to the "**Contractor Project References**" 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 at least 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.	

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.**

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. **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, shop drawings, payment applications, 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.**

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	25	
2.Scheduling	0	5	15	25	
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					

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, Project philosophy, its ideas related to constructability, and other construction-specific ideas, concerns, or related issues (i.e., schedules, budgets, subcontractor selection, etc.).	200	
2. Budget/Schedule/Value Engineering. Firm’s articulation of its experience and expertise in managing project budget, construction schedule and value engineering.	100	
3. 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.)	100	
4. Overall Ability and General Suitability. Firm’s articulation of its overall skills, ability to complete the Project, ability to work with other project professionals/consultants and general suitability for the District’s purposes (i.e., implementation of District policies and procedures, additional information, etc.).	100	
5. Personnel/Leadership. Firm’s articulation of its Project-designated personnel, leadership, subcontractor relations, relationship with other Project participants, apprenticeship program, etc.	100	
SUBTOTAL QUALIFICATION POINTS FROM STEP 4	600	

Attachment 3

CONTRACTOR PROJECT REFERENCES

CONTRACTOR PROJECT REFERENCES

- Provide the information requested below for the **ten (10)** most recently completed Lease Leaseback projects your Firm has completed as a General Contractor.
- At least **four (4)** of these projects must be Lease Leaseback projects with an original contract value of \$25,000,000 or more completed within the last **ten (10) years**.
- If your Firm has not completed at least **ten (10)** Lease Leaseback projects, list those projects first and then list most recently completed California K-14 public school projects, preferably design-build projects, for a total of **ten (10)** projects (at least **four (4)** of which must be Lease Leaseback projects with an original contract value of \$25,000,000 or more completed within the last **ten (10) years**).
- Include all information indicated below on separate sheets 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:

Scope of Work:

Original completion date:

Date completed:

Initial contract value (as of time of contract award):

Final contract value:

Lease Leaseback?

Budgeted contractor contingency: \$ _____ Contractor contingency used: \$ _____

Budgeted owner contingency: \$ _____ Owner contingency used: \$ _____

Attachment 4

SUBCONTRACTOR PROCUREMENT PROCESS
(CONTRACTORS MUST FOLLOW FOR SUBSEQUENT RFP)

Bidding for Subcontractor Work. The request for proposal (“RFP”) that is later issued by the District shall require each Contractor to prequalify some or all subcontractors and shall comply with the requirements for the procurement of subcontractors set forth in Education Code section 17406 and as further detailed in the RFP. The subcontractor procurement process may be one or a combination of the following processes:

- **One Step Process of Low-Bid or Best-Value or Combination of Both.** The RFP may ask for a lump-sum cost for the project and the District will select the Contractor on a low-bid basis, a best-value basis, or a combination of both. All Contractors’ subcontractors in excess of ½ of 1% of that lump sum cost shall be identified in the Contractors’ proposals and shall be afforded the protections of the Subletting and Subcontracting Fair Practices Act. (Public Contract Code § 4100, et seq.)

- **Two-Step Process of Low-Bid or Best-Value or Combination of Both.**
 - Step 1.** The RFP may ask Contractors to provide (1) some initial pricing information (e.g., fee for preliminary services, general conditions, partial construction services, etc.) and (2) some subcontractors be identified in the proposal. The District will select the Contractor on a low-bid basis, a best-value basis, or a combination of both.

 - Step 2.** The selected Contractor, when directed later by the District, shall provide a final lump sum guaranteed project cost. At that time, the District will inform the Contractor whether the Contractor will award the subcontracts on a low-bid basis, a best-value basis, or a combination of both. Also at that time, the successful Contractor shall provide notice of bidding for all remaining subcontractors “in accordance with the publication requirements applicable to the District’s competitive selection process.” **The District intends to work with the successful Contractor for the Project to issue an advertisement to solicit subcontractors in compliance with statutory requirements and the District’s process.**

Best-Value Process for Subcontractor Selection. If the District directs the selected Contractor to award some or all of its subcontracts on a best value basis, the Contractor shall utilize the following best value criteria and process:

Best Value Criteria for Subcontractors	Required Response for a Subcontractor to Qualify
1. Has the subcontractor performed at least two (2) subcontracts for at least 90% of the value of the current subcontract?	Yes
2. Has the subcontractor 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?	No
3. Has the subcontractor defaulted on a contract, been substituted off a project after beginning performance, or been terminated for cause by any prime contractor or public agency on any project within California during the past five (5) years and has that default, substitution or termination been upheld by a court or an arbitrator?	No
4. Has the subcontractor paid liquidated damages pursuant to a contract for a project with either a public or private owner within the past five (5) years?	No
5. Has the subcontractor’s Workers’ Compensation Experience Modification Rate exceeded 1.5 at any time for the past five (5) premium years?	No

<p>6. Has the subcontractor failed in its performance of a contract with the Contractor during the past five (5) years and does the Contractor have documentation to support that failed performance? (If so, and if the Contractor does not wish to subcontract with that subcontractor and if it provides to the District with that documentation, the District shall, at its reasonable discretion, permit Contractor to list and contract with the next lowest subcontractor for the project.)</p>	<p>No</p>
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Attachment 5

LEASE LEASEBACK AGREEMENT