



PASADENA UNIFIED SCHOOL DISTRICT
351 South Hudson Avenue
Pasadena, CA 91109

REQUEST FOR QUALIFICATIONS/PROPOSAL – RFP #13-23/24

LEGAL SERVICES RELATED TO REAL PROPERTY ASSETS

ISSUE DATE:	NOVEMBER 21, 2023	
PROPOSAL DUE:	NOVEMBER 30, 2023	No later than 2:00pm (PST)
INTERVIEWS (IF NEEDED)	TBD	
Governing Board Meeting- Tentative Award of Contract	DECEMBER 14, 2023	

REQUEST FOR QUALIFICATIONS AND PROPOSALS
RFP #13-23/24 LEGAL SERVICES RELATED TO REAL PROPERTY ASSETS

RESPONSES ARE DUE:

NO Later than 2:00PM(PST) on Wednesday, November 29, 2023

SUBMIT VIA EMAIL TO:

Teresa Castaneda, Consultant, Procurement & Contracts: spo-castaneda@pusd.us

and

CC: Kingsley Udo, Interim Chief Business Officer: udo.kingsley@pusd.us

Pasadena Unified School District (PUSD) is seeking a qualified firm to provide legal services related to real property assets.

BACKGROUND

Pasadena Unified School District (PUSD) is a public K-12 school district with enrollment of more than fourteen thousand (14,000) students in grades TK-12th grade in a 76-square mile area that includes Altadena, Pasadena, Sierra Madre and unincorporated areas of Los Angeles County. PUSD currently operates twenty-eight (28) schools and programs. Thirteen (13) elementary schools (grades K-5), one (1) K-8, three (3) middle schools (grade 6-8), two (2) 6-12th grade schools, two (2) high schools (grades 9-12), one (1) continuation high school, one (1) alternative education program, five (5) children centers. There are additional sites used for special programs, maintenance and operations, and education center. All sites are listed in Attachment A in this RFQ/P document.

The PUSD (District) invites qualified Firms to submit Qualifications and Proposals for the provision of legal services related to real property assets.

The District is seeking to select one Firm to provide the requested Services but reserves the right to select more than one Firm for the Services.

Proposals must contain all requested information about the Firm. Proposals should be complete and prepared to provide an insightful, straightforward, and concise overview of the Firm's proposal to provide the Services. Firm's Proposal must be signed by an individual or individuals authorized to execute legal documents on behalf of the Firm.

A. SCHEDULE The following is the schedule for this RFQ/P, which is subject to change:

RFP Issuance Date: November 21, 2023

Deadline for Proposal Submission: November 30, 2023 2:00PM

Interviews (IF needed): TBD (Notification of at least 2-day notice)

Recommendation to Governing Board: December 14, 2023

PUSD shall not, under any circumstance, be liable for any pre-contractual expenses incurred by potential bidders shall not include any such expenses as part of their bids. Pre-contractual expenses are defined as any expenses incurred by a potential bidder in: (1) preparing its bid in response to this RFP; (2) submitting that bid to PUSD; (3) negotiating with PUSD any matter related to this RFQ/P, including a possible contract; or (4) engaging in any other activity prior to the effective date of award, if any, of a contract resulting from this RFQ/P.

Withdrawal of Proposal: Any proposer may withdraw a proposal, either personally or by written request at any time prior to the scheduled closing time. To withdraw your proposal, please contact:
Teresa Castaneda, Consultant, Procurement & Contracts: spo-castaneda@pusd.us

B. QUALIFICATIONS

The selected Firm shall carry out the responsibilities briefly delineated in the scope of services set forth below. Such services shall be performed consistent with the highest standard of care for professionals performing similar scopes of services. Respondents to this RFQ/P should be able to demonstrate their current capability and possess a record of successful past performance in providing substantially similar services as those specified in this RFQ/P.

The ideal Firm shall possess the following desired qualifications:

- At least ten (10) years of legal experience with at least five (5) years of experience representing a K-12 public-school district in California.
- Substantial knowledge and experience in the interpretation of state, federal and local laws and codes as they relate to California K-12 Districts.
- Knowledge of building development, leasing/brokerage, lease agreements, and property management.
- Knowledge of the Education Code.
- Knowledge of the Brown Act, Political Reform Act, and Govt. Code 1090.
- Current member of the California State Bar

C. SCOPE OF SERVICES

The Firm shall be readily available to perform the following legal services:

1. Provide advice and consultation with the Board of Education, the Superintendent, and Key Personnel in connection with their general and specific powers and duties.
2. Provide legal services concerning building development, leasing/brokerage, lease agreements and property management.
3. Review RFPs for building development
4. Review (or draft) and negotiate lease agreements.
5. Advise on responses to subpoenas and court orders related to real estate.
6. Defend lawsuits or legal claims regarding lease agreements.
7. Provide information on new federal and state law that may impact the District operation and advise appropriate action.
8. Provide updates related to senate bills, assembly bills, legal matters, public law, and state mandates that may impact the District operation and advise appropriate

action.

9. Attend, if necessary, and be physically present on days of Board meetings as requested by District representative(s).

The Firm, upon the District's request, shall provide guidance through the legal perimeters ensuring the District's due diligence on projects related to real property assets. The following are examples of such projects:

1) Evaluate property for reuse in accordance with Education Code requirements and Board Policies and assist the District in consideration of potential Community Use options, including Community-serving/Non-Profit, Recreational, Educational, Residential;

- a. Make recommendations regarding options for leasing, exchange, sale, or potential development opportunities consistent with Board policies;
- b. Support Community Engagement efforts, including meetings (both virtual and in-person), outreach to stakeholders through survey work, and development of summary expectations for community-supported reuse of sites;
Stakeholder outreach may include both school and community groups, city entities, and other local agencies, community-based organizations, and potentially interested site users

2) Property valuation services to assess the potential for revenue generation for District sites, considering various scenarios;

Prepare and update a matrix of valuations under the identified re-use scenarios;

3) Assist the District in engaging parties potentially interested in District property;

- a. Assist in coordinating work for an identified project under the California Environmental Quality Act (CEQA).
- b. Provide transparent and open public processes to engage potential site users;
- c. Coordinate processes and seek firm proposals for property use in accordance with Board direction, Education Code requirements and Board Policies
 - Assist the District with the preparation of required offerings and notifications specific to the property based upon anticipated use
 - Provide analysis of proposals received for specific property uses to ensure responsiveness
 - Provide best value financial analysis of proposals received for specific property reuse options
 - Present confidential transaction information on options for specific property to the Board as allowed by Education Code
 - Assist in negotiating best value for the District in leases or other uses

D. INSTRUCTION TO BIDDERS & CONTENT OF PROPOSALS

Firm's Proposal must be concise, well organized, demonstrate Firm's proposed services and formatted as outlined below.

- **Responses shall be numbered corresponding to the numbered sections D.1. through D.4. below.**
- **Bid Form A (pg.8):** Company Contact Information must be signed and included in proposal submission.
- **Bid Form B (pgs.9-10):** References must be complete, signed and included in proposal submission.
- Please keep your proposal concise and avoid lengthy presentations about your firm's history or member's resumes.
- Submittals are to be submitted in pdf format as an email attachment.

RFQ/P CONTENT REQUIREMENTS

1) COVER LETTER (maximum of 1 page)

- (a) Provide a letter of introduction signed by an authorized officer of the company
- (b) Include a brief description of why your firm is well suited for, and can meet, the District's needs.

2) PROJECT APPROACH AND RELEVANT QUALIFICATIONS

- (a) Describe your firm's approach to and experience with property valuation, understanding of opportunities and limitations on school district property re-use.
- (b) Describe how your firm has worked with local communities and public agencies to seek compatible and community supported uses for school property while maximizing revenue to school districts.
- (c) Describe your firm's experience with long-term property planning for school districts.
- (d) Describe your experience with building public-private partnerships to leverage funding opportunities for development.
- (e) How does your firm approach community engagement? Provide examples of work with previous districts.
- (f) Firm and team experience in working with District 7-11 or Property Asset Committees.

3) RELEVANT PROJECT EXPERIENCE AND REFERENCES

- a) Provide information about prior legal services related to real property assets furnished by your firm in the last ten (10) years on a minimum of five (5) K-12 School Districts in California.
- b) Key individuals of the firm involved and their roles in the project(s) and any sub-consultants that worked with the firm.

4) FEES

Provide a detailed list of all fees to be charged, including hourly rates, travel time costs, and costs for support services of word processing, copying, etc.

- a. If applicable, reflect the method of determining charges for work performed; and include hourly rates for the following:
 - Principal
 - Senior Partner
 - Partner

- Senior Associate
- Mid-Level Associate
- Associate
- Of Counsel Attorney
- Graduate Legal Assistant
- Law Clerk
- Paralegal Staff
- Any other potential personnel

- b. Describe adjustments to the fees for subsequent years of the contract.
- c. Describe, in detail, charges for telephone calls/consultation, e-mail correspondence, fax transmission/receiving, travel time, attendance of evening Board meetings, court litigation and administrative proceedings, and any other expenses to be separately billed.
- d. Identify billing increments (i.e., 1/10 hour, 1/4 hour, etc.).

E. SELECTION PROCESS

District will evaluate responsive proposals and will determine which, if any, proposals are in the District's overall best interest to accept. During the evaluation process, the District may request additional information, clarifications, explanations, and answers from any proposing respondent.

INTERVIEWS

The District may request any or all proposing respondents to participate in a presentation and/or interviews regarding their proposal. The invited respondents must be able to be available for the presentation and/or interviews (if any) within two days of the request unless another date has been agreed upon.

The District reserves the right to conduct negotiations with any number of respondents, or with only a single respondent, as determined by the District, before entering into contract agreements.

SELECTION CRITERIA

The selection will be based upon, but not limited to, the following criteria:

- A. Quality and comprehensiveness of the response.
- B. Background and experience in providing work as identified in the Scope of Services section of this RFQ/P.
- C. Knowledge of applicable state laws and regulations, and other governmental requirements for K-12 California public school districts.
- D. Professional and technical expertise of proposed key personnel.
- E. Strong client references and firm's professional reputation of past work.
- F. Cost-effectiveness and competitive pricing.

The Selected Firm will be selected based on qualifications and demonstrated competence that includes relevant experience with public agencies, including local agencies, and a proven track record of success for these types of

Services based on the designated relative weight given to each criterion as a percentage of the RFQ/P's total points possible:

Selection Criteria Relative Weight (%):

Experience 40

Pricing 30

Responsiveness of Proposal 15

References 15

F. FINAL DETERMINATION AND AWARD

The District reserves the right to contract with any entity responding to this RFP for all or any portion of the work described herein and/or in an Agreement offered to the entity, to reject any RFQ/P as non-responsive, and/or not to contract with any firm for the services described herein. The District makes no representation that participation in the RFQ/P process will lead to an award of contract or any consideration whatsoever.

Issuance of this RFQ/P does not commit the District to pay any costs incurred with the preparation of a response proposal. All Firms should note that the execution of any contract pursuant to this RFQ/P is dependent upon successful negotiation of terms and fees as well as approval by the District's Governing Board.

BID FORM A
Company/Contact Information

This form is required to be signed and submitted with your Proposal

TO: PASADENA UNIFIED SCHOOL DISTRICT, a California Unified School District, acting by and through its Governing Board ("District"), 351 South Hudson Ave., Pasadena, CA 91109

FROM:

Name of Company Address

City, State, Zip Code

Phone

Email

Authorized Signature and Print Name

Name(s) of Bidder's Authorized Representative(s) & Title

Date: _____

Bid Form B
REFERENCES

FIRM NAME: _____

Provide no less than five (5) California K-14 district references where your firm provided legal services related to real property assets.

1. District Name _____

Address _____

Phone Number _____ Fax Number _____

Contact Name _____ E-Mail _____

2. District Name _____

Address _____

Phone Number _____ Fax Number _____

Contact Name _____ E-Mail _____

3. District Name _____

Address _____

Phone Number _____ Fax Number _____

Contact Name _____ E-Mail _____

Bid Form B
(Continued)

REFERENCES

4. District Name _____

Address _____

Phone Number _____ Fax Number _____

Contact Name _____ E-Mail _____

5. District Name _____

Address _____

Phone Number _____ Fax Number _____

Contact Name _____ E-Mail _____

Proposer/Firm Name: _____ **Date:** _____

Signature: _____

Attachment A PUSD SITE LOCATIONS

Elementary K-5

School Location	School	Address	Zip Code
004	Altadena	743 E. Calaveras St. Altadena	91001
061	Don Benito Fundamental K-5	3700 Denair St. Pasadena	91107
018	Field	3600 Sierra Madre Blvd. Pasadena	91107
026	Hamilton	2089 Rose Villa St. Pasadena	91107
028	Jackson	593 W. Woodbury Rd. Altadena	91001
038	Longfellow	1065 E. Washington Blvd. Pasadena	91104
040	Madison	515 Ashtabula St. Pasadena	91104
060	Norma Coombs	2600 Paloma St. Pasadena	91107
048	San Rafael	1090 Nithsdale Rd. Pasadena	91105
050	Sierra Madre Elementary	141 W. Highland Sierra Madre	91024
075	Washington Accelerated School	1520 N. Raymond Ave. Pasadena	91103
056	Webster	2101 E. Washington Blvd. Pasadena	91104
058	Willard	301 S. Madre St. Pasadena	91107

MIDDLE SCHOOLS 6-8

School Location	School	Address	Zip Code
070	Eliot Middle	2184 N. Lake Ave. Altadena	91001
052	Sierra Madre Middle	160 N. Cañon Ave. Sierra Madre	91024
079	Octavia E. Butler Magnet	1505 N. Marengo Ave. Pasadena	91103

Attachment A -Continued PUSD SITE LOCATIONS

SENIOR HIGH SCHOOLS 9-12

082	Muir High	1905 N. Lincoln Ave. Pasadena	91103
084	Pasadena High	2925 E. Sierra Madre Blvd. Pasadena	91107

SPECIAL SCHOOLS

080	Blair IB 6-12	1201 S. Marengo Ave. Pasadena	91106
088	Rose City High School 10-12	351 S. Hudson Ave. Pasadena	91109
064	Marshall Fundamental Secondary 6-12	990 N. Allen Ave. Pasadena	91104
072 (K-5) 073 (6-8)	McKinley School	325 S. Oak Knoll Ave. Pasadena	91101
085	Center for Independent Study 10-12	300 Madre St. Pasadena	91107
093	Twilight Adult School	524 Ventura St. Altadena	91001

CHILDRENS' CENTERS

Cleveland CC	524 Palisade St., Pasadena	91103
Jefferson CC	391 N. Sierra Bonita Ave., Pasadena	91106
Longfellow CC	1377 N. Mar Vista Ave., Pasadena	91104
Washington CC	1520 Raymond Ave., Pasadena	91103
Willard CC	345 S. Halstead St., Pasadena	91107

Additional Sites

Pasadena Unified School District, Education Center, 351 S. Hudson Avenue, Pasadena, CA 91109

District Service Center, 740 W. Woodbury Road, Pasadena, CA 91103

Special Education Department, 315 N Pasadena Ave., Pasadena CA 91103

Child Development Department, 524 Palisade St., Pasadena, CA 91001 PUSD

Mental Health, 1520 N Raymond, Bldg. 2-7, Pasadena CA 91103

Community Ed. Center (3035 E. Foothill)