

Oxnard School District



Request for Qualifications and Proposals

Lease Lease-Back Preconstruction and Construction Services for McAuliffe Elementary School Modernization Project

Prequalification Questionnaire Due: Wednesday, August 7, 2024 at 1:00 PM

RFQ/P Responses Due: Wednesday, August 21, 2024 at 1:00 PM

There is a Prequalification component to this RFQ/P. Please see instructions and complete the forms required through Quality Bidders: <https://www.qualitybidders.com/pages/contractor>. All prequalification documents are due by 1:00 p.m., on Wednesday, August 7, 2024.

Respondents must mail or deliver sealed proposals containing five (5) bound copies of their Statement of Qualifications and Proposals conforming to the requirements of this RFQ/P by 1:00 p.m., on Wednesday, August 21, 2024 to:

OXNARD SCHOOL DISTRICT
C/O CALDWELL FLORES WINTERS, INC.
521 N. 1st Avenue
Arcadia, CA 91006

Respondents must also transmit one (1) PDF copy via email to gschober@cfwinc.com.

Only Firms that have registered with the California Department of Industrial Relations (DIR) regulations are eligible to be further considered for a construction contract. For any public project, as defined in subdivision (c) of Section 22002 of the Public Contract Code, for which the District uses funds received pursuant to the Leroy F. Greene School Facilities Act of 1998 (Chapter 12.5 (commencing with Section 17070.10) of Part 10 of Division 1 of Title 1 of the Education Code) or any funds from any future State school bond for a public project that involves a projected expenditure of one million dollars (\$1,000,000) or more, the District shall require that prospective general contractors and prospective electrical, mechanical and/or plumbing subcontractors ("Firms") complete and submit a standardized prequalification questionnaire and financial statement, verified under oath.



**Oxnard School District
Request for Qualifications and Proposals (RFQ/P)
for Lease Lease-Back Preconstruction and Construction Services for
McAuliffe Elementary School Modernization Project**

I. INTRODUCTION

Interested firms are invited to submit qualifications and proposals for Preconstruction and Construction Services for the Oxnard School District's McAuliffe Elementary School Modernization Project to be provided through a Lease Lease-Back method of construction delivery. Firms are invited to submit qualifications and a proposal for the project.

Section 2 of this RFQ/P outlines the desired preconstruction and construction scope of work for the project. Section 3 provides a project description including a summary of the scope, budget, and schedule of the McAuliffe Elementary School Modernization Project. Sections 4 through 10 and related attachments outline the RFQ/P submittal requirements and selection procedure as well as general information, and requirements.

At the conclusion of the selection process, a recommended firm will be considered by the District's Board of Trustees for the project. Subject to Board approval and upon notification to proceed, the selected firm shall perform preconstruction services, including reviewing design documents for constructability, completeness, scheduling, clarity, consistency and coordination; undertaking a value-engineering analysis, soliciting subcontract bids, and preparing reports with recommendations to the District and the architect to maintain the established budget, pursuant to a Lease Lease-Back Agreement.

The project shall be performed under the direction of Caldwell Flores Winters, Inc. (CFW), the Program Manager, and the Oxnard School District (District). The selected firm shall work with the assigned architect for the project as needed to conduct the proposed scope of work. Following the completion of preconstruction services, the District may begin negotiations with the selected Lease Lease-Back (LLB) firm to enter into a Construction Services Agreement and requisite documents establishing a Guaranteed Maximum Price (GMP) pursuant to a Lease Lease-Back method of construction delivery.

II. SCOPE OF WORK

The District desires to select a firm capable of providing LLB preconstruction and construction services for the project. The selected firm for the project should expect to perform preconstruction services as established by the District pursuant to a Preconstruction Services Agreement. If the District proceeds with the construction of the project, the selected firm may be retained as a LLB contractor pursuant to a Construction Services Agreement, Lease, and Sub-lease and may contract with separate specialty trade contractors to perform the required scope of work.

Preconstruction Services are anticipated to include the following:

1. Review design and support documentation for content, constructability, completeness, scheduling, clarity, consistency and coordination
2. Undertake value-engineering analysis and prepare reports with recommendations to District and Architect of Record to maintain established program budget and specifications
3. Provide detailed cost estimates at construction document design
4. Expedite design reviews, including modifications, if any, based on value analysis
5. Provide a proposed guaranteed maximum price for the construction of the project

Construction Services are anticipated to include, but not be limited to the following:

1. Provision of a proposed Guaranteed Maximum Price (GMP) for the construction of the project with identified subcontractor bids and self-performed work
2. Construction of the Project
3. Coordination of record drawings and specifications
4. Compilation of operations and maintenance manuals, warranties/guarantees, and certificates
5. Obtaining occupancy permits and coordinating testing, documentation, and governmental inspections and approvals
6. Preparation of accounting and closeout reports and occupancy plan reports
7. Other responsibilities as necessary for the completion of the program

III. PROJECT DESCRIPTION

The McAuliffe Elementary School modernization project improves 28 existing classrooms, provides for repurposing of existing spaces to STEAM Academy and piano labs, and improves support spaces to comply with the District's vision and specification for 21st Century K-5 classrooms and support school facilities. Upgrading the library into a Media Center is proposed which provides for the inclusion of two breakout rooms. The repurposing of two adjacent supply rooms into administrative and counselor space is also provided. Other interior improvements include allowances for modernized improvements to floors, walls and ceilings, sinks, electrical systems, and furnishings, as well as data and other technology upgrades consistent with those available at similarly reconstructed schools, where possible. The project has received approvals from both the Division of the State Architect (DSA) and the California Department of Education (CDE).

The project design documents were approved by the DSA on April 19, 2021. Since DSA approval of the design documents, additional scope of work for the project is under consideration to be added to the project through an addendum process including minor improvements to the administrative office area, roofing, security cameras and access controls, ADA requirements in parking lot, and removal of portables. The approved DSA plans and specifications are available for download at the following link:

[McAuliffe Elementary School DSA Approved Plans and Specs](#)

Project Budget and Schedule

The total construction budget for the project is \$6,500,000. The anticipated project timeline is subject to adjustment based on the timing and processing of administrative approvals, prevailing market conditions, weather and environmental conditions, and unforeseen site conditions. The timeline for the project is as follows:

- **Start Construction:** January 2025
- **End Construction:** March 2026

Work will need to be completed in phases and the school will remain operational during the academic year with students and staff in place. It is currently anticipated that the scope of work will be completed in four (4) phases and proposals should account for this accommodation.

IV. SUBMITTAL FORMAT AND REQUIREMENTS

Prequalification: There is a Prequalification component to this RFQ/P. Please see instructions and complete the forms required through Quality Bidders:

ATTACHMENT A

<https://www.qualitybidders.com/pages/contractor>

Please refer to Quality Bidders for detailed instructions and scoring process for evaluation.

ALL PREQUALIFICATION DOCUMENTS ARE DUE BY 1:00 P.M., ON WEDNESDAY, AUGUST 7, 2024

RFQ/P Response: Firms responding to the project are required to prepare a response to this RFQ/P that includes general information about the firm's qualifications as well as a proposal that assesses and evaluates the design of the project as to construction recommendations, logistics, cost, value engineering, and schedule.

Firm Qualifications: submittals are required to provide a response regarding the firm's capabilities, prior experience, and past projects. This information should include, but need not be limited to, the following:

- A. Provide three (3) or more references of elementary school modernization projects or similar facilities as examples of the Firm's experience on projects such as this with respect to size and complexity.
- B. Description of size of Firm with respect to the number of personnel by management category. Please provide an organizational chart identifying the key staff members assigned to each role and their level of experience on projects such as this.
- C. Description of the Firm's practices for managing project schedules, budgets, subcontracts, change orders, project documents, and other construction issues. Provide a description of the Firm's project control systems. Sample project specific progress reports are encouraged for inclusion in the Firm's response to this question (not counted toward page limit of the RFQ/P).
- D. Provide a description of the Firm's safety record and Experience Modification Rating (EMR).
- E. Provide a letter from the Firm's bonding company on their letterhead that states the bonding capacity of the Firm.

Proposal: Submittals are required to include a response to the following site-specific questions for the project. This information should include, but need not be limited to, the following:

- F. Review of the DSA approved plans for the Project, providing at minimum:
1. A narrative identifying any potential construction issues or other challenges that may arise during the project and proposed solutions to ensure that said challenges do not create unnecessary delays or added cost to the project.
 2. A conceptual site logistics plan identifying site access, parking for contractors, access for delivery and storage of materials, and provisions for the safety of students and faculty.
 3. A conceptual cost estimate, demonstrative of the firm's estimating capability, for the project as specified and as conceptually proposed in uninflated 2024 dollars.
 4. Detailed proposal of the Firm's preconstruction fee and how it would be broken down based on the deliverables identified in the Form Preconstruction Services Agreement.
 5. Detailed breakout of the factors or elements that are anticipated to comprise the calculation of a future "Guaranteed Maximum Price" (GMP) including the above conceptual estimate of direct construction costs as well as an anticipated break-down of overhead, general conditions, markups, insurance, bonds, and fees.
- G. Brief description of 2-5 value engineering opportunities that the Firm would propose to keep the project within the proposed budget identified herein.
- H. Identification of trades that the firm will propose bidding and those that the firm proposes to self-perform. Also include trade contractor costs, self-performance costs, general contracting requirements, contractor soft costs (without fee), contractor fee and GMP allowance and contingency. Respondents should put forth proposals that clearly identify estimations of costs of work to be self-performed, as well as estimations of costs to be performed by sub-contractors. The intention is that the cost estimations and work plan provided clearly identify a breakdown of the respondents' overhead costs, and not just a lump sum. The expectation is a breakdown of anticipated overhead costs that clearly defines the general conditions, bonds, insurance, fee, and other costs to provide the District information necessary to select a firm that provides the best value.
- I. Description of the Firm's approach to keeping the project delivered on schedule, while minimizing impact on existing school facilities and neighboring communities throughout construction. Please provide a proposed Project schedule that demonstrates this approach, including preconstruction milestones that the Firm will help to establish to optimize the construction phase.

RFQ/P Response Format:

Responses shall be concise, well organized and demonstrate respondent's qualifications and proposed approach to the project. Each response should have a single cover letter briefly discussing the firm's conceptual understanding of the project and an executive summary of the proposal.

Limit response for the *Firm Qualifications* requested to no more than ten (10) single sided 8 ½ x 11 pages. *Firm Qualifications* includes the cover letter indicated above. For the *Proposal* requested, limit response for the project to no more than ten (10) single sided 8 ½ x 11 pages. In total, the Firm Qualifications and Proposal is limited to a grand total of twenty (20) single sided 8 ½ x 11 pages.

Excluded from the page count limitation are pages exclusively used for layout and organization of the submittal package (e.g. front and back covers, table of contents, tabbed dividers, etc.) as well as sample materials representative of prior project work included as addenda (e.g. schedules, progress reports, graphics, etc.). Also excluded from the page count limit are materials indicated for prequalification.

Submit five (5) printed proposals to:

OXNARD SCHOOL DISTRICT
C/O Caldwell Flores Winters, Inc.
521 N. 1st Avenue
Arcadia, CA 91006

Respondents must also transmit one (1) PDF copy via email to gschober@cfwinc.com.

The printed and email copies are due by no later than:

Wednesday, August 21, 2024 at 1:00 PM

Please be advised that the District reserves the right to decline all responses and to amend, abandon, or modify the Project or the method of delivery at its sole discretion in whole or in part.

V. METHOD OF SELECTION

The District's Selection Committee shall review and evaluate all responses received by the deadline. Each Firm will be evaluated based on the Evaluation Criteria identified in Section VI. Based on these criteria and rating system, points are assigned to each Respondent, with each respondent ranked according to the average total points awarded by members of the Selection Committee. Failure to satisfy a pass/fail requirement will result in the immediate rejection of the proposal. Final point totals of all respondents will be considered to determine the best value for the School District.

The firm determined to have the best value for the District for the project will be invited to perform Lease Lease-Back preconstruction and construction services for the project. Following the completion of Preconstruction services, and at the discretion of the District, the selected firm may be recommended to the Board for entering into a Lease Lease-Back Construction Services Agreement for the project. The District retains the right in its sole discretion to reject all submittals or revise this request for said services.

VI. SUBMITTAL EVALUATION CRITERIA

Pursuant to District Board Policy (BP) and Administrative Regulations (AR) 3311, proposers shall be selected based on total best value score as determined by the District, based on the following evaluation criteria and rating system provided in the table below:

EVALUTION CRITERIA	MAXIMUM POINTS
Follows page length and layout direction and includes requested document attachments as described by the RFQ/P	Pass/Fail
Experience with the local environment and a local presence for interfacing with the District	Pass/Fail
Provides germane and relevant responses to questions contained within the RFQ/P	25
Details a proposed method and overall strategic approach	25
Proposed detailed estimate of the Firms(s) costs, including direct construction costs and break-down of overhead, general conditions, markups, insurance, bonds, and fees	15
Demonstrates specialized experience and technical competence of the Firm(s), including principals, joint venture-partners, and sub-consultants regarding the types of service required and the complexity of the projects	15
Relevant experience of key personnel	5
Overall financial condition of the firm, including the principal contractor and/or contractor team	5
Ability to meet the insurance requirements unless district, at its sole discretion, decides to modify or waive the insurance requirements or elects to provide program insurance	5
Litigation and arbitration history for the past five (5) years	5
TOTAL: 100 POINTS	

VII. SELECTION SCHEDULE

The following is a proposed schedule for selection. The District reserves the right to modify this schedule in its sole discretion.

Request for Qualifications/Proposals Released: **Wednesday, July 17, 2024**

Deadline to submit questions related to project: **Wednesday, July 31, 2024 at 1:00 p.m.**

Prequalification Submittal Due: **Wednesday, August 7, 2024 at 1:00 p.m.**

Announcement of prequalified firms: **Wednesday, August 14, 2024**

Responses due: **Wednesday, August 21, 2024 at 1:00 p.m.**

Interviews: **Week of August 26, 2024**

Firm Ranking Established: **Week of August 26, 2024**

Board approval: **October 16, 2024 or thereafter**

If interested parties wish to visit the school site, all coordination must be through the Gerald Schober, Vice President, Implementation Services, gschober@cfwinc.com (626) 829-8701.

VIII. GENERAL INFORMATION

A. Compliance

Submittals must be in strict accordance with the requirements of the request for services. Any response not submitted in accordance with the requirements of the request for services will not be considered.

B. Amendments

The District reserves the right to cancel or revise in part or whole this request for services. If the District cancels or revises this request for services, all respondents will be notified by addendum. The District also reserves the right to extend the date responses are due.

C. Inquiries

All questions about the meaning or intent of this request for services shall be submitted to the District's Program Manager, CFW, in writing via letter or email no later than **Wednesday, July 31, 2024 at 1:00 p.m.** Responses to all questions received may be issued at the District's discretion by addendum via email to all parties recorded by CFW as having received this document. Questions received after the **July 31, 2024** deadline will not be answered. If interested parties wish to visit the school site, all coordination must be through the Gerald Schober, Vice President, Implementation Services, gschober@cfwinc.com (626) 829-8701.

D. Late Response to Proposals

It is the respondent's responsibility to ensure its response to this request for services is received by the District's Program Manager on or before the time and date specified. Submittals received after the date and time specified will not be considered.

E. Special Conditions

1. **Public Record.** All Responses submitted in response to the request for services become the property of the District's public records and as such, might be subject to public view.
2. **Non-Discrimination.** The District does not discriminate on the basis of race, color, national origin, religion, age, ancestry, medical condition, disability or gender in consideration for an award of contract.
3. **Drug-Free Policy and Fingerprinting.** The selected Firm(s) shall be required to complete any and all fingerprinting requirements and criminal background checks required by State law and shall also be required to complete a Drug-Free workplace certificate.
4. **Costs.** Costs of preparing a response to this request for services are solely the responsibility of the respondent.
5. **Prevailing Wages.** Respondents are advised that these projects are a public work for purposes of the California Labor Code, which requires payment of prevailing wages. District will obtain from the Director of the Department of Industrial Relations the general prevailing rate of per diem wages and the general prevailing rate for holiday and overtime work. These rates will be on file at the District and will be available to any interested party upon request. Any Firm(s) to which a contract is awarded must pay the prevailing rates, post copies thereof at the job site, and comply with applicable provisions of State law.
6. **Securities.** Respondents are advised that if awarded a contract they will be permitted, at their request and expense and in accordance with Section 22300 of the California Public Contract Code, to substitute securities equivalent to retention monies withheld by District to insure performance under the contract.
7. **Contractor Registration.** No contractor or sub-contractor may be listed on a bid proposal for a public works project (submitted on or after March 1, 2015) unless registered with the Department of Industrial Relations (DIR) pursuant to Labor Code Subsection 1725.5.
8. **Contractor Prequalification.** A proposer must be prequalified in accordance with subdivisions (b) to (m), inclusive, of Section 20111.6 of the Public Contract Code. In addition to this requirement, all responding firms are required to complete the attached Prequalification Questionnaire. These prequalification requirements shall be included in a Lease Lease-Back instrument created pursuant to California Education Code Section 17406(a)(1).

9. Prequalification of Designated Subcontractors. Contractors holding C-4, C-7, C-10, C-16, C-20, C-34, C-36, C-38, C-42, C-43, and/or C-46 licenses (collectively, “MEP subcontractors”) shall be prequalified to perform construction work as a first-tier subcontractor on the Project pursuant to Public Contract Code section 20111.6. MEP subcontractors must be prequalified prior to negotiation and acceptable of a Guaranteed Maximum Price (GMP).
10. Bonding. The Firm(s) will be required to furnish a Performance Bond in the amount of one hundred percent of the contract price, and a Payment (Material and Labor) Bond in the amount of one hundred percent of the contract price.
11. Limitations. This request for services does not commit District to award a contract, to defray any costs incurred in the preparation of a response pursuant to this request for services, or to procure or contract for work.

IX. HOLD HARMLESS/INDEMNIFICATION

The Firms shall indemnify, defend, and save the District, its Board of Trustees, officers, agents, and employees harmless from any and all claims, damages, losses, causes of action and demands, including reasonable attorney’s fees and costs, incurred in connection with or in any manner arising out of the Firms’ performance or failure to perform any duties contemplated by this request for services or subsequent agreement.

The responding Firms and their employees are not employees of the District and are deemed to be independent contractors. Nothing contained in this request for services or subsequent agreements shall be deemed to create any contractual relationship between the Firms and any of the other contractors or material suppliers for the Program, nor shall anything contained in this request for services or subsequent agreements be deemed to give any third party any claim or right of action against the District or Firms which do not otherwise exist.

X. CONSTRUCTION SERVICES RELATED AGREEMENTS

The following links provide interested firms with copies of the Oxnard School District’s form construction services related agreements:

- A. Quality Bidders
<https://www.qualitybidders.com/pages/contractor>
- B. [Form Construction Services Agreement](#)
- C. [Form Site Lease](#)
- D. [Form Sublease](#)

Any questions or concerns regarding the above form agreements should be addressed in writing to Gerald Schober, Vice President, Implementation Services via email: gschober@cfwinc.com by **Wednesday, July 31, 2024 at 1:00 p.m.**

ATTACHMENT A
Oxnard School District

Please see instructions and complete the forms required through Quality Bidders:
<https://www.qualitybidders.com/pages/contractor>

ATTACHMENT B
Oxnard School District

Form Construction Services Agreement

ATTACHMENT C
Oxnard School District

[Form Site Lease](#)

ATTACHMENT D
Oxnard School District

[Form Sublease](#)