

**SAN MATEO COUNTY OFFICE OF EDUCATION
REQUEST FOR QUALIFICATIONS AND PROPOSALS (RFQ/P)
For
FACILITIES MASTER PLANNING SERVICES
INCLUDING FACILITY SUSTAINABILITY INITIATIVES**

April 9, 2025 (Issued)

Responses must be received by Tuesday May 13, 2025, no later than 2:00 PM

NOTICE IS HEREBY GIVEN that the San Mateo County Office of Education (“SMCOE”) is seeking proposals from qualified firms, partnerships, corporations, associations, persons, or professional organizations (“Consultants”) to provide proposals for Facilities Master Planning Services Including Facility Sustainability Initiatives (“Project”). These services are intended to comprehensively address selected SMCOE-owned and operated facilities, listed herein. The primary goal of the Facilities Master Plan Including Sustainability Initiatives (“FMP”) is to serve as a roadmap for future development, renovation, modernization, maintenance of facilities and facility sustainability guidance. The FMP will address the long-range and short-term goals and objectives of the SMCOE and inform operational efficiencies, leveraging available capital funds. Interested Consultants are encouraged to submit detailed proposals outlining their expertise and strategies for achieving these objectives. Also included are Facility Sustainability Initiatives that will identify the SMCOE’s opportunities in achieving sustainable goals.

Interested Consultants are invited to submit a Statement of Qualifications (“SOQ”) and a detailed Fee Proposal (collectively “RFQ/P” or “Packet”), as described below, of the requested materials with a cover letter addressed to:

**San Mateo County Office of Education
Ron Soper, Director, Sustainable Construction and Facilities
101 Twin Dolphin Drive
Redwood City, CA 94065**

The SMCOE will only accept electronic Packets sent via email. Faxed or mailed hard copy RFQ/P Packets will not be accepted. Packets received by the SMCOE no later than 2:00 PM (Pacific Time) on Tuesday May 13, 2025, via email will be accepted. Email RFQ/P Packet to Ron Soper, Director, Sustainable Construction and Facilities: rpsoper@smcoe.org. RFQ/P Packets received after this date and time will not be accepted.

If you have any questions regarding this RFQ/P, please submit them in writing to Ron Soper, Director, Sustainable Construction and Facilities: rpsoper@smcoe.org, by 4:00 p.m. on

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Tuesday, May 1, 2025. Responses will be provided by an Addendum to this RFQ/P by 4:00 p.m. on Tuesday, May 7, 2025.

Each submittal must conform and be responsive to the requirements set forth in this RFQ/P. The SMCOE reserves the right to waive any informalities or irregularities in received submittal Packets. Further, the SMCOE reserves the right to reject any and all submittals and to negotiate contract terms with one or more responding Consultants for one or more of the work items. The SMCOE retains the sole discretion to determine issues of compliance and to determine whether a responding Consultant is responsive, responsible, and qualified.

FULL OPPORTUNITY

The SMCOE hereby affirmatively ensures that Disadvantaged Business Enterprises (“DBE”), Small Local Business Enterprise (“SLBE”), Small Emerging Local Business Enterprise (“SELBE”), and Disabled Veterans Business Enterprise (“DVBE”) firms shall be afforded full opportunity to submit qualifications in response to this notice and will not be discriminated against on the basis of race, color, national origin, ancestry, disability, gender, transgender status, political affiliation, or religion in any consideration leading to the award of contract. No qualified disabled person shall, on the basis of disability, be excluded from participating in, be denied the benefits of, or otherwise subjected to discrimination in any consideration leading to the award.

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RFQ/P SCHEDULE OF ACTIVITIES

Listed below is the “Schedule of Activities” which outlines pertinent dates of which Consultants responding to this solicitation should make themselves aware. The SMCOE reserves the right to change the schedule without prior notice.

Date	Event	Time Deadline
Wed, April 9, 2025	First Advertisement of RFP/RFQ - Facility Master Planning Services Including Facility Sustainability Initiatives	4:00 PM
Wed, April 16, 2025	Second Advertisement of RFP/RFQ - Facility Master Planning Services Including Facility Sustainability Initiatives	4:00 PM
Mon, April 28, 2025	Prequalification Mandatory Conference followed by Site Walks - Approx. 5 hours	9:00 AM
Fri, May 2, 2025	Last Day to Submit Questions to the SMCOE	4:00 PM
Wed, May 7, 2025	Last Day by which the SMCOE Will Answer Questions or Post Addenda	4:00 PM
Tue, May 13, 2025	Deadline for all Submittals in Response to RFQ/P	2:00 PM
Fri, May 16, 2025	Release of Short-Listed Respondents to RFQ/P	4:00 PM
Tue, May 20, 2025	Interviews of Short-Listed Respondents	TBD
Thur, May 22, 2025	Final Selection by the SMCOE	4:00 PM
Fri, May 23, 2025	Notice of Intent to Award Issued by the SMCOE	1:00 PM

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**RFQ/P for Facility Master Planning Services
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REQUEST FOR QUALIFICATIONS AND PROPOSALS

The purpose of this RFQ/P is to solicit statements of qualifications and fee proposals from experienced Consultants to submit proposals for Facilities Master Planning Services Including Facility Sustainability Initiatives (“Project”). The Project is intended to comprehensively address all six SMCOE-owned facilities including: SMCOE Central Office San Mateo County Special Education; Gateway Center; Anne Campbell Center for Children and Families; Special Services Center El Portal School; Special Services Center Palos Verdes School; and the Rollins Road Facility. The list of facilities within the scope of this RFQ/P is listed on page 8.

A. SMCOE OVERVIEW

The SMCOE is located in San Mateo County and serves approximately 55 students in SMCOE-run schools and programs with 0 students in Transitional Kindergarten (“TK”), 9 students in grades K-5, 13 students in grades 6-8, and 33 students in grades 9-12.

For early childhood education, there are 4 preschoolers at the Anne Campbell Center (see the List of Facilities on page 8).

In summary, the SMCOE has a total of 6 facilities/campuses which includes 4 SMCOE-run schools/programs: 1 grades 6-12 County community school, 2 grades K-22 Special Education program, and 1 early childhood education program. The SMCOE has no adult education program.

Additional information can be found on the SMCOE website at the following link:

<https://www.smcoe.org/>

Additional information about SMCOE’s Strategic Plan can be found on the SMCOE website at the following link:

<https://www.smcoe.org/about/county-office-of-education/strategic-plan.html>

This RFQ/P and the accompanying General Services Agreement is posted to the SMCOE website at the following link:

<https://www.smcoe.org/about/county-office-of-education/request-for-proposals.html>

B. SMCOE MISSION AND VISION

SMCOE Mission Statement:

Inspiring Students. Investing in Educators. Invigorating Leaders. Involving Families and Communities.

SMCOE Vision Statement:

Excellence and Equity in Education. Every Student. Every Educator. Every School.

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SMCOE Core Practices:

- *Growth Mindset*
- *Accountability*
- *Trauma-Informed Approach*
- *Sustainability*
- *Cultural Humility*

SMCOE Equity Statement:

The San Mateo County Office of Education welcomes and embraces individuals from all backgrounds, races, ethnicities, disabilities, gender identities, sexual orientations, immigration statuses, and religions. At the San Mateo County Office of Education, equity means providing every learner aged 0-22 with the education and support needed to thrive in school, career, and life, and every staff member with opportunities to grow and further deepen their impact.

C. BASIC SERVICES

The Consultant agrees to provide the Services described below:

- 1. Quality.** The Consultant shall be responsible for the professional quality and technical accuracy of all reports and other services furnished by the Consultant under the Agreement. The Consultant shall, without additional compensation, correct or revise any errors or omissions in its reports and other services.
- 2. Mandatory Assistance.** If a third-party dispute or litigation, or both, arises out of, or relates in any way to the services provided under this Agreement, upon the SMCOE's request, the Consultant, its agents, officers, and employees agree to assist in resolving the dispute or litigation. The Consultant's assistance includes but is not limited to, providing professional consultations, attending mediations, arbitrations, depositions, trials, or any event related to the dispute resolution and/or litigation ("Mandatory Assistance").
- 3. Insurance (Mandatory Requirements).** Attach a letter from your insurance company or a certificate of liability insurance ("ACORD") indicating your firm's ability to provide insurance as required in the attached agreement, including but not limited to the following:
 - 3.1** A.M. Best financial strength rating (FSR) of A- or better.
 - 3.2** Commercial General Liability Insurance: Commercial General Liability Insurance shall be at least as broad as Insurance Services Office Commercial General Liability Coverage (Occurrence Form CG 0001), with coverage limits of not less than One Million Dollars (\$1,000,000) per occurrence for bodily injury, personal injury and property damage / Two Million Dollars (\$2,000,000) in the aggregate.

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- 3.3 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), with coverage limits of at least One Million Dollars (\$1,000,000) for bodily injury and property damage each accident limit and Two Million Dollars (\$2,000,000) in the aggregate.
- 3.4 Workers' Compensation and Employer's Liability Insurance: The selected Consultant shall insure (or be a qualified self-insured), under the applicable laws relating to workers' compensation insurance, all of their employees working on the Project, in accordance with the "Workers Compensation and Insurance Act," Division IV of the California Labor Code. The selected Consultant 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.
- 3.5 Professional Liability (Errors and Omissions) Insurance: errors and omissions insurance on a claims made basis with a limit of at least One Million Dollars (\$1,000,000) per occurrence and Two Million Dollars (\$2,000,000) in the aggregate with a deductible in an amount not to exceed the sum of Ten Thousand Dollars (\$10,000.00).
- 3.6 All insurance will be in a form and with insurance companies acceptable to the SMCOE.
- 3.7 Insurance carriers shall be qualified to do business in California and maintain an agent for process within the State.

D. STATEMENT OF WORK

- 1. **Summary of the Scope of Work:** Produce a 5-year Facilities Master Plan Including Sustainability Initiatives (FMP) that supports SMCOE's planning by aligning the plan to SMCOE's strategic initiatives, Board policies, and key Federal, State and County initiatives, including:
 - A. Approved SMCOE facility spending plan
 - B. Approved SMCOE facilities education requirements
 - C. Early childhood initiatives
 - D. Potential State Funding (Proposition 2) requirements set forth by the California State School Facility Program including:
 - i. An inventory of existing facilities, sites and properties including the following: the year each building was built, square footage, the year each building was modernized, pupil capacity for each school, the age and number of

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- portable buildings at each school, whether the school has a cafeteria, multipurpose room, a library or a gymnasium.
 - ii. Existing classroom capacity.
 - iii. Projected enrollment growth over the next five years.
 - iv. A capital planning budget outlining applicable projects identified in the FMP.
 - v. Financing and other funding sources that would be used to support the acquisition of applicable school site(s), new construction project(s), modernization project(s), and lead testing and remediation projects.
 - vi. Verification of applicable SMCOE facilities' assessed value from the appropriate local government entity that collects and maintains this information.
 - vii. The SMCOE's deferred maintenance plan.
- E. State building codes as enforced by the Division of the State Architect (DSA)
- i. California Building Code (Title 24) including Cal Green, California Energy Code, Access Compliance per Title 24, Seismic Safety Standards.
- F. Design standards and resources
- i. CHPS (Collaborative for High Performance Schools)
 - ii. LEED DD+C (Leadership in Energy and Environmental Design), Building Design and Construction for schools.
 - iii. NBI (New Buildings Institute), Decarbonization Roadmap Guide for School Building Decision Makers.
 - lii. Green Schoolyards: Develop appropriate recommendations and strategies for best practices per current guidelines by [Green Schoolyards America](#).
- G. Education Specification (Ed Spec) per the California Department of Education (CDE). The Consultant should address the following key components of an Ed Spec for FMP purposes:
- i. Space Needs - verification of classroom sizes, support spaces (e.g., libraries, labs, cafeterias) and that site requirements are met.
 - ii. Functional Relationships - identify how to optimize varying space; uses should interact to enhance learning and efficiency.

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- iii. Technology and Infrastructure - address connectivity, power needs, and future adaptability.
 - iv. Safety and Accessibility – confirm compliance and/or deficiencies with Title 24.
 - v. Sustainability and Energy Efficiency – Alignment with CALGreen.
- H. SMCOE’s sustainability goals and partnerships:
- i. The SMCOE is embarking on a multi-decade effort to achieve carbon neutrality by 2040 so new buildings use no more energy than they generate. In existing buildings, SMCOE desires to gradually replace gas building mechanical equipment and appliances with all-electric heat pumps.
 - ii. The SMCOE is mandating that all new vehicles in SMCOE’s fleet be emissions free and all-electric vehicles (EV).
 - iii. The SMCOE’s sustainability partnerships include: San Mateo County Sustainability Department, Peninsula Clean Energy, and PG&E.
- I. Facilities Master Plan Sustainability Initiatives
- I. Energy - Develop an energy plan with the goal of identifying inefficient building mechanical equipment and replacement with all-electric systems; energy resiliency with the addition of photovoltaic systems; battery back-up; campus micro grids; and EV charging infrastructure

Using Energy Use Intensity (EUI) as a metric, establish an existing EUI for the six existing SMCOE facilities which is currently unknown.

Using current available PG&E billing data along with site observations of existing building mechanical systems, perform a baseline energy usage summary identifying key building energy inefficiencies with opportunities for improvement, including lighting and HVAC upgrades.
 - ii. Indoor Air Quality (IAQ) - Develop an IAQ monitoring program for 4 of the SMCOE’s school facilities. The IAQ monitoring program shall be a cloud platform showing real-time IAQ readings with dashboard display(s), with one display per school. The IAQ shall sense indoor temperature,

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relative humidity, carbon dioxide (CO₂), particulate matter (PM) 2.5, and total volatile organic compounds (TVOC).

IAQ Guidance: CDPH (California Department of Public Health) Guidance for Ventilation, Filtration, and Air Quality in Indoor Environments to Reduce Risk of Respiratory Infections; ASHRAE (American Society of Heating and Air-Conditioning Engineers) Design Guidance for Education Facilities: Prioritization for Advanced Indoor Air Quality, v. 2.0.

- iii. Water - The SMCOE intends to invest in efficient building plumbing systems by replacing aging systems.

Identify aging, inefficient, or non-compliant fixtures along with associated issues including accessibility and mobility standards.

Domestic water shall be flushed to accommodate the testing of lead contamination within the domestic cold water supply.

Water Consumption Monitoring - Develop a water consumption monitoring program, to be a cloud platform showing real-time water consumption readings with dashboard display(s).

- iv. Methane Gas (Natural Gas) - Develop a strategy that aligns with SMCOE's goal of ridding facilities of methane gas-consuming equipment within five years.

Methane Gas Consumption Monitoring - Develop a methane gas consumption monitoring program, to be a cloud platform, showing real-time water consumption readings with dashboard display(s).

- vi. School Grounds - Identify opportunities to capture and manage the flow of stormwater through on-site retention strategies.

- vii. Climate Action Plan (CAP) - The goal of the CAP is to provide the SMCOE with clear goals and actionable objectives that will serve as a policy guiding document. CAP will provide a prioritized list of climate actions designed to align with emerging regional and statewide targets, offering some clarity on recent federal changes. The CAP will involve collaboration with community partners and key stakeholders, as recommended by the consultant working closely with the

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FMP Planning Team, ensuring that the needs of vulnerable populations are prioritized.

A holistic CAP will strive to strike a balance between environmental, social and economic aspects of sustainability. Key aspects include facility resiliency, energy and water efficiency, transportation, and facility decarbonization strategies.

The Consultant proposal narrative should adequately describe the Consultant's approach and methodology for achieving the goals set forth in the following Governor's Executive Orders:

Executive Order B-16-12 - Sets goal of 1 million zero-emissions vehicles by 2020.

Executive Order B-30-15 - Sets interim target of greenhouse gas emissions 40 percent less than 1990 levels by 2030.

Executive Order B-55-18 - Achieve statewide carbon neutrality by 2045.

Executive Order N-19-19 - Require every aspect of State government to redouble its efforts to reduce greenhouse gas emissions and mitigate the impacts of climate change while building a sustainable, inclusive economy.

Executive Order N-79-20 - Requires that 100 percent of in-state sales of new passenger cars and trucks be zero-emission by 2035.

The Consultant proposal narrative should adequately describe the Consultant's approach and methodology for the reduction of the release of NO_x gases (nitric oxide (NO) and nitrogen dioxide (NO₂)) resulting from the combustion of methane (natural) gas appliances and other building mechanical equipment. The reduction amounts are set forth by the Bay Area Air District, formerly BAAQMD, in the following building appliance rules:

By 2027 - Only zero NO_x water heaters can be installed (<75,000 BTU/hr).

By 2029 - Only zero NO_x furnaces can be installed (<175,000 BTU/hr).

- J. Additional architectural or engineering services will be procured as needed to support the desired FMP outcome.

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2. Part A: Review of SMCOE Facilities, Enrollment Projections, and Visioning Session

- A. **Gather:** SMCOE provided site drawings, floor plans, and feedback from the Facilities Master Planning Team (“**FMP Planning Team**”).
- B. **Document:** Existing Conditions per documents provided by the SMCOE (site plans, floor plans) along with site visits and feedback from the FMP Planning Team.
- C. **Review:** The SMCOE provided site drawings, floor plans, and feedback from the FMP Planning Team.
- D. **Visioning Session:** Conduct a visioning session for the FMP Planning Team to collaborate and develop a vision for the FMP, set goals, establish standards for ground truth and assessment, and create a roadmap for community engagement.
- E. **Analyze:** The SMCOE’s current, short term and long-term projected enrollment and demographic shifts for integration into the FMP.
- F. **Integrate:** The SMCOE’s Facilities Education Specifications for programmatic investments into the overall FMP recommendations.
- G. **Coordinate:** The SMCOE’s Research Assessment & Data (“**RAD**”) and **FMP Planning Team** to develop parameters and framework for a comprehensive facilities database that hold facility data that can be updated to drive key decision-making.
- H. **Dashboards:** Develop dashboards that provide staff and the community access to key water use and energy use data.
- I. **Database:** Develop a comprehensive facilities planning database linked to updated diagrams showing all the SMCOE-owned facilities, current conditions, enrollment, and capacity. Update the following six sites in the List of Facilities in the Scope of the Facilities Master Plan on the following page:

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List of facilities in the scope of the Facilities Master Plan

Site No.	Site Name and Address Website (if available)	Site Use	No. of Occupants	Year Built	Building Area (SF)
01	San Mateo County Office of Education 101 Twin Dolphin Drive Redwood City, CA 94065 www.smcoe.org	Administrative	205 Staff	TBD	53,523
02	Gateway Center 35 Tower Road San Mateo, CA 94402 Gateway Center	Community School (9-12)	11 Staff 10 Students	2007	8,640
03	Anne Campbell Center for Children and Families 65 & 69 Tower Road San Mateo, CA 94402 Anne Campbell Center	California State Preschool	8 Staff 1 Student	65 Tower Rd. 1960 67 Tower Rd. 2000	65 Tower Rd. 27,304 67 Tower Rd. 33,949
04	Special Services Center El Portal School 1280 Commodore Drive San Bruno, CA 94066 Special Services Center El Portal School	School (K-8)	26 Staff 22 Students	1966	16,948
05	Special Services Center Palos Verdes School 1290 Commodore Drive San Bruno, CA 94066 Special Services Center Palos Verdes School	School (9th to 22 years old)	27 Staff 22 Students	1965	20,805
06	Rollins Road Facility 1800 Rollins Road Burlingame, CA 94010	Vacant, Light Commercial Use	N/A	1950	34,866

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3. **Part B: Site Assessment / Facilities Condition and Programmatic Capacity**
 - A. **Facilities Capacity Model:** Use data from the SMCOE's Facilities Capacity database to more accurately reflect current site allocations and generate capacity reports to inform the SMCOE's strategic decisions.
 - i. **Traditional Facility Capacity** (the number of students a building can accommodate based upon the classrooms available and contractual class sizes) and Programmatic Capacity (the number of existing core classrooms and the specific unique programs assigned to a school and the space requirements for those programs).
 - ii. **Facility Needs Assessment:** including preparation of a Facilities Conditions Index (FCI) for major buildings at each site.
 - Conduct site assessments to review functional issues and gather information on current conditions at all the SMCOE owned sites.
 - Analyze the SMCOE databases
 - Survey and analyze existing building systems assessment including: electrical systems and system capacity, roofing, HVAC systems, core building systems, seismic safety, accessibility, fire, life-safety, building and site security.
 - iii. **Cost Estimates:** Identify current and projected costs for recommended facility additions and improvements, including cost-benefit analysis for remodeling, repurposing, new construction, and site acquisition.
 - Use estimated cost for improvements and identified replacement costs to prepare the Facilities Condition Index.
 - The escalation period will be identified as part of the visioning session considering the FMP five-year update cycle. Project escalation for five-and ten-year periods based on current industry standards.
4. **Part C: Development of the Facilities Master Plan Including Sustainability Initiatives**

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- A. Develop a Facilities Master Plan Including Sustainability Initiatives (FMP) with an Executive Summary that also includes specific specialized master planning guidance.
 - i. Electrification Master Planning Recommendations
 - ii. Early Childhood Master Planning Recommendations Recommendations
 - iii. HVAC Master Planning Recommendations
 - iv. Strategic facilities objectives:
 - Improving Classroom Environments and Indoor Air Quality
 - Energy Efficiency and Sustainability
 - SMCOE-wide Safety Improvements
 - Living School Yards and Playscapes
 - Deferred Maintenance
 - Secondary Sports Facilities and Upgrades
 - Technology Infrastructure
 - Early Childhood Investments
 - Creating Dignified Dining Spaces in School Cafeterias
- B. Identify future areas where the SMCOE should invest funding to create quality schools for students, using enrollment projections, city developments, and clear identification of needs based on grade spans, school size minimums, and the Facility Condition Index.
- C. Prioritize short-term and long-term SMCOE needs, consider community and joint use opportunities:
 - i. Prepare site facilities needs/recommendations
 - ii. Identify building system needs
 - iii. Identify clear areas of deferred maintenance needs
 - iv. Energy savings measures for each school site
 - v. Develop strategies and implementation steps for identified needs. Prioritize the SMCOE needs using a scale identified in the visioning session, categorizing them as immediate, short-term, long-term or nice-to-have.

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5. Part D: Community Engagement.

- A. Assist the FMP Planning Team in developing a communication plan to engage with SMCOE stakeholders and the community. Support the SMCOE in conducting at least 4 meetings (town hall sessions), with SMCOE stakeholders to be identified by the FMP Planning Team.
 - i. This includes meetings/forums with the community and staff
 - ii. Data-gathering surveys and other platforms to get feedback from school sites, school community members, and community members.
 - iii. Support the FMP Planning Team in developing an interactive webpage on the Facilities website, hosted within the SMCOE's existing webmaster platform, to share feedback from key constituents across the SMCOE.
 - iv. Identifying key issues related to facilities and site-specific needs
 - v. Identifying practical solutions that will accurately reflect the SMCOE's capital needs
- B. Formal presentations of the Draft and Final Facilities Master Plan to the FMP Planning Team.

E. DELIVERABLES

- 1. Facilities Master Plan with Executive Summary in a PDF and editable version to support annual updates by the SMCOE.
- 2. Overall process of development of FMP.
- 3. Guiding principles that will allow the SMCOE to address the needs of existing facilities while also providing the ability for the SMCOE to adapt to changing conditions across the County.
- 4. Planning context documentation.
- 5. Needs assessment and Facilities Inventory datasets, Educational Program, databases, and methodology.
- 6. Prioritized list of recommended projects as "Project-Specific Initiatives".
- 7. Assistance in developing an interactive Facilities Master Plan on the SMCOE website, including design and content creation, or other creative approaches to make it user-friendly and interactive.
- 8. Presentations to the FMP Planning Team.

F. ESTIMATED TIMELINE

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The parts listed below can be completed concurrently or sequentially, as appropriate. The SMCOE is open to feedback or considerations regarding the estimated timelines.

1. **Contract Procurement** - May 27 - June 20, 2025 (4 weeks)
2. **Part A** - Review of the SMCOE Facilities, Enrollment Projections, and Visioning Sessions: June 23 - August 15, 2025 (8 weeks).
2. **Part B** - Site Assessment / Facilities Condition and Programmatic Capacity: August 18 - October 10, 2025 (8 weeks).
3. **Part C** - Development of the Facilities Master Plan: October 13 - December 5, 2025 (7 weeks).
4. **Part D** - Present Draft FMP to the **FMP Planning Team**: December 9, 2025.
5. **Part E** - Present Final FMP to the **FMP Planning Team**, December 16, 2025.
6. **Acceptance** - Adopted by the SMCOE, December 19, 2025.

G. COORDINATION

1. Foster collaboration with the **FMP Planning Team** with various SMCOE departments and leverage the expertise of sub-consultants to address data gaps effectively.
2. Actively engage the public by partnering with the SMCOE community to disseminate and promote the Facilities Master Plan objectives.
3. Present the Facilities Master Plan to the **FMP Planning Team** to ensure clear communication and understanding.

H. DATA TRANSMITTAL AGREEMENT

1. The SMCOE will own all raw data collected, to be transmitted at the Project's end or at Project termination, if applicable.
2. Provide final clean data in the required format at no extra cost.
3. Transmit databases in full relational schematic structure.
4. Provide detailed documentation on data collection.
6. Supply details on aggregate result calculations based on raw data.
7. Designate the Consultant's point person to handle all data-related questions.

I. STATEMENT OF QUALIFICATIONS AND FEE PROPOSAL

1. **General Information / Instructions – Statement of Qualifications**

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- a. The SMCOE is inviting Statements of Qualifications and Fee Proposals for the “Project” which shall require coordination, administration, consulting and advice, and related services.
- b. The SMCOE seeks to identify firms with a record of excellence in efficient planning and successful project delivery. The firms must have relevant experience related to K-12 educational facilities including expertise in facilities master planning, and navigating interactions with various government agencies such as the Division of the State Architect (“DSA”), the Office of Public School Construction (“OPSC”).
- c. The Statement of Qualifications must contain all requested information about the firm and must be on no larger than 8 1/2 x 11 paper and no more than twenty (20) printed pages in length. The 20-page limit (as if printed single sided) shall cover Sections 2.1 through 2.5 below. The Statement of Qualifications should be complete and provide an insightful, straightforward, and concise overview of the capabilities of the Consultant. Additional information about the Consultant and/or its personnel may be placed in an Appendix which will not count against the 20-page limit.

2. Content - Statement of Qualifications

- a. **Letter of Interest** – A dated Letter of Interest must be submitted, including the legal name of the firm(s), address, telephone, email address(es) and fax numbers, and the name, title, and signature of the person(s) authorized to submit the Statement of Qualifications on behalf of the firm. The Letter of Interest should provide a brief statement of the firm's experience indicating the unique background and qualities of the firm, its personnel, and its sub-consultants, and what will make the firm a good fit for work with the SMCOE. The letter shall also include the following statements:
 - i. “[RESPONDENT’S NAME] received a copy of the SMCOE’s Agreement attached as EXHIBIT A to the RFQ/P. [RESPONDENT’S NAME] has reviewed the indemnity provisions in EXHIBIT A and the insurance requirements contained in the Agreement. If given the opportunity to contract with the SMCOE, [RESPONDENT’S NAME] has no objections to the use of the Agreement.”
 - ii. If the respondent has any questions including questions about the form of the Agreement, it must submit in writing by the deadline for questions listed on the Schedule of

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Activities, to allow the SMCOE to review and issue a written response in an Addendum to the RFQ/P.

- iii. Respondent shall certify that no official or employee of the SMCOE, nor any business entity in which an official of the SMCOE has an interest, has been employed or retained to solicit or assist in the procuring of the resulting contract(s), nor that any such person will be employed in the performance of any/all contract(s) without immediate divulgence of this fact to the SMCOE.
- b. **Executive Summary** – The Executive Summary should contain firm information, an outline of the firm's approach, along with a brief summary of the firm's qualifications.
- c. **Firm Information** – Provide a narrative of the services offered by the firm. The narrative should include all the following:
 - i. Provide a brief history of the firm and, if a joint venture, of each participating firm. Identify legal form, ownership, and senior officials of the company(ies). Describe the number of years in business and types of business conducted. Describe staffing capacity and resources to perform the scope of work.
 - ii. Describe the firm's approach and how it will work with the SMCOE's administration officials, community partners, and the SMCOE facilities staff to ensure data input will be inclusive.
 - iii. Discuss the firm's/team's ability to meet schedules for comparable projects, firm's schedule management procedures, and how the firm has successfully handled potential agency approval delays.
 - iv. Identify master planning services for K-12 educational facilities provided by the firm in the past five (5) years. Limit response to no more than the ten (10) most recent projects.
 - v. Please include the following information for each project:
 - Name of the project and school district,
 - Scope of project, description of services provided,
 - Contact person, email address and telephone number at the school district,
 - Firm person in charge of each projects,

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- Consulting dollar value of each project
3. **Litigation.** Provide information on any litigation arising from the firm's projects, if any, in the past five (5) years. State the issues in the litigation, the status of litigation, names of parties, and outcome.
4. **Professional Fees** – Firms shall provide a detailed fee proposal.
- a. Provide a Not-to-Exceed Fee which will include a line item for a 10% contingency to the Proposed Fee. The contingency will be to cover potential additional services and shall be subject to SMCOE approval. Breakdown of Fee Proposal shall be submitted as follows:
 - i. Proposed Fee with line item amounts for each of the tasks noted in Section D – Statement of work
 - ii. Contingency of 10% of proposed fee
 - iii. Not-to-Exceed fee (Proposed Fee plus 10% Contingency)
 - b. Provide a detailed schedule of the Consultant's and Sub-consultant's hourly billing rates and a breakdown of associated costs for all tasks proposed (including contingency costs per task). Also note the time period that the fee schedule would apply and shall include the period covering the project duration.
 - i. The SMCOE reserves the right to negotiate different rates submitted with the RFQ/P prior to the execution of the agreement.
 - c. Additional Data – Provide additional information about the firm as it may relate to the Statement of Qualifications. Include any data that may assist the SMCOE in understanding the firm's qualifications and expertise. This additional data shall be in an Appendix and will not be counted in the fifteen-page limit.

J. SMCOE'S EVALUATION / SELECTION PROCESS

- 1. The SMCOE may, at its discretion, interview some or all of those firms submitting a Statement of Qualifications. The SMCOE may check references, and may perform investigations of firms that extend beyond the information in the proposals. Any firm(s) selected for interviews must make available for interview the key personnel it intends to assign to the SMCOE's Project..
- 2. Submittals will be opened privately to assure confidentiality and avoid disclosure of the contents to competing respondents prior to and during the review, evaluation and negotiation processes. However, to the extent

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that the submittals are public records under California law, the submittals may be released to the public if requested by members of the public.

3. Submittals will be reviewed for responsiveness and evaluated pursuant to established objective criteria, with particular attention to, without limitation, each respondent's qualifications, demonstrated competence in construction, and the Firm's ability to integrate its personnel with the SMCOE's staff and consultants.
4. After the submittals are evaluated and/or ranked, the SMCOE, at its sole discretion, may elect to interview the top Firm(s). The SMCOE may elect to interview one or more Firms. Interviews are tentatively scheduled as indicated above. Adequate time will be allowed for presentation of qualifications followed by questions and answers.

K. FINAL DETERMINATION AND AWARD

1. The SMCOE reserves the right to contract with any entity responding to this RFQ/P, to reject any proposal as non-responsive, and not to contract with any firm for the services described herein. The SMCOE reserves the right to reject any or all submissions, to request further information, to negotiate with any firm, to extend the submission deadline, or to amend or cancel in part or in its entirety this RFQ/P. This RFQ/P does not commit the SMCOE to award a contract or to reimburse any firm for costs incurred in submitting a proposal.
2. The awarding of contract(s) is at the sole discretion of the SMCOE. The SMCOE may, at its option, determine to award contracts only for portions of the scope of work. In such a case, the successful proposing firm will be given the option not to agree to enter into the Agreement and the SMCOE will retain the right to negotiate with any other proposing firm selected as a finalist. If no finalist is willing to enter into a contract for the reduced scope of work, the SMCOE will retain the right to enter into negotiations with any other Respondent responding to this RFQ/P.
3. The RFQ/P packet, and any other supporting materials submitted to the SMCOE in response to this RFQ/P will not be returned and will become the property of the SMCOE unless portions of the materials are designated as proprietary at the time of submittal, and are specifically requested to be returned. This RFQ/P does not commit the SMCOE to negotiate an agreement with any proposing firm or individual. All materials submitted in response to this RFQ shall become the property of the SMCOE and shall be considered public records.

END OF RFQ/P