LAKE TAHOE UNIFIED SCHOOL DISTRICT
REQUEST FOR QUALIFICATIONS AND PROPOSALS (RFQ/P) #2
PROGRAM/PROJECT MANAGEMENT SERVICES

NOTICE IS HEREBY GIVEN that Lake Tahoe Unified School District ("District") is requesting qualified persons, firms, partnerships, corporations, associations, or professional organizations to provide comprehensive program/project management ("PM") services for the District's Measure U Bond Program and projects thereunder.

Respondents to this RFQ/P should mail or deliver five (5) bound copies, one (1) unbound copy, and one (1) electronic copy on flash drive of their Statement of Qualifications ("SOQ") and Proposal (together, "Submittal"), as further described herein, labeled "Submittal for Program/Project Management Services" to:

LAKE TAHOE UNIFIED SCHOOL DISTRICT
1021 Al Tahoe Blvd.
South Lake Tahoe, CA 96150
ATTN: Dr. Todd Cutler
RFQ/P#2

ALL RESPONSES ARE DUE BY 4:00 P.M., ON JANUARY 31 2025. Any Submittal received after that date and time will not be accepted and will be returned unopened. **FAXED OR EMAILED RESPONSES WILL NOT BE ACCEPTED.**

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

If you have any questions regarding this RFQ/P, please email bond@ltusd.org, before 4:00 p.m. on January 24, 2025. Answers will be posted on the District website by 4:00 p.m. on January 27, 2025.

RFQ/P RESPONSE SCHEDULE SUMMARY

The District reserves the right to change the dates on the schedule without prior notice.

DATE / TIME	EVENT
1/15/25 4:00 PM	Release of RFQ/P.
1/24/25	Deadline for submission of written questions to District concerning RFQ/P.
1/31/25 4:00 PM	**Deadline for all Submittals in response to RFQ/P.**
2/7/25	Interview candidates notified.
Week of February 10th 2025	Interviews of short-listed Respondents.
	Notification to Respondent(s) selected for contract negotiation.

I. BACKGROUND

Lake Tahoe Unified School District ("District") strives to discover and foster the unique talents and potential of all its students by cultivating a collaborative nurturing environment which embraces diversity, promotes equity and develops confident lifelong learners resulting in academic excellence, civic responsibility, and emotional & physical wellness.

Briefly stated, the District is seeking experienced and proven firms to provide program/project management services for District's Measure U Bond Program and projects thereunder. This RFQ/P defines the services sought and generally outlines the District's requirements.

II. SCOPE OF SERVICES

Any firm selected based on this RFQ/P process must be capable of providing full program/project management services through all phases of any and all selected projects under the Measure U Bond Program in accordance with District's form of Agreement for Program/Project Management Services ("Agreement"), attached hereto as **APPENDIX A**. The detailed scope of services is set forth at **Exhibit A** to District's form Agreement.

It is vital that the selected firm(s) have the ability to work cooperatively and effectively with the County Administrator, District's Board of Education ("Board"), the Superintendent, District staff, the various school site planning committees, and the community. The District places great emphasis on facilitation and communication with all of its stakeholders. The firm(s) retained by the District will be part of the District team and will be expected to operate in a team environment.

III. LIMITATIONS

The District reserves the right to contract with any person or entity responding to this RFQ/P. The District makes no representation that participation in the RFQ/P process will lead to an award of contract or any consideration whatsoever. The District shall in no event be responsible for the cost of preparing a response to this RFQ/P.

The Submittals and any other supporting materials submitted to the District in response to this RFQ/P, will not be returned and will become the property of the District unless portions of the material are designated as proprietary at the time of the Submittal and are specifically requested to be returned. Vague designations and/or blanket statements regarding entire pages or documents are insufficient and will not bind the District to protect the designated matter from disclosure. Pursuant to *Michaelis, Montanari, & Johnson v. Superior Court* (2006) 38 Cal.4th 1065, Submittals shall be held confidential by the District and shall not be subject to disclosure under the California Public Records Act until after either: (1) the District and the successful Respondent have completed negotiations and entered into an agreement, or (2) the District has rejected all Submittals. Furthermore, the District will have no liability to the Respondent or other party as a result of any public disclosure of any Submittal.

IV. FULL OPPORTUNITY

No Respondent will be discriminated against on the basis of race, religious creed, color, national origin, ancestry, physical disability, mental disability, reproductive health decisionmaking, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age, sexual orientation, or veteran or military status in any consideration leading to the award of the contract. The District hereby affirmatively ensures that Disadvantaged Business Enterprises ("DBE"), Small Local Business Enterprises ("SLBE"), Small Emerging Local Business Enterprises ("SELBE"), and Disabled Veterans Business Enterprises ("DVBE") shall be afforded full opportunity to submit in response to this RFQ/P.

V. RESTRICTIONS ON LOBBYING AND CONTACTS

From the period beginning on the date of the issuance of this RFQ/P and ending on the date of selection, no person or entity submitting in response to this RFQ/P, nor any officer, employee, representative, agent, or consultant representing such a person or entity, shall contact through any means or engage in any discussion regarding this RFQ/P, the evaluation/selection process, or the award of any contract with the County Administrator, any member of the District, Board of Education, or any member of the Citizens' Oversight Committee. Any such contact shall be grounds for the disqualification of the Respondent.

VI. SUBMITTAL REQUIREMENTS

A. Format Requirements

Submittals shall be no more than twenty (20) single-sided pages or ten (10) double-sided pages in length. This page limitation excludes front/back covers, divider sheets/tabs, and allowed appendices. Submittals containing more than the authorized number of pages will not be considered. Material must be in 8-1/2 x 11-inch format with no less than 11-point font size. Submittals shall include divider tabs labeled with boldface headers below; e.g. the first tab would be entitled "Cover Letter", the second tab would be entitled "Business Information", etc.

Provide five (5) bound copies, one (1) unbound copy, and one (1) electronic copy of the Submittal. The electronic copy will only be accepted via flash drive in the following programs: Microsoft Office Suite or PDF. The unbound copy shall be marked "Copy for Reproduction", and shall be formatted as follows:

- No divider sheets or tab.
- Pages with proprietary information removed.

- A cover sheet listing Respondent's name, the total number of pages, and identifying those pages that were removed due to proprietary information.

B. <u>Content Requirements</u>

1. Cover Letter (maximum of 2 pages)

- Provide a letter of introduction signed by an authorized officer of Respondent. If Respondent is a joint venture, duplicate the signature block and have a principal or officer also sign on behalf of each party to the joint venture.
- Include a brief description of why Respondent is well suited for, and can meet, the District's needs.
- Clearly identify the individual(s) who are authorized to speak for Respondent during the evaluation process.
- Include one (1) of the follow statements:

  "[INSERT RESPONDENT'S NAME] received a copy of the District's form of Agreement for Program/Project Management Services ("Agreement") attached as APPENDIX A to the RFQ/P. [INSERT RESPONDENT'S NAME] has reviewed the Agreement, including the indemnity provisions and insurance provisions contained therein. If given the opportunity to contract with the District, [INSERT RESPONDENT'S NAME] has no objections to the use of the Agreement."

  OR

  "[INSERT RESPONDENT'S NAME] received a copy of the District's form of Agreement for Program/Project Management Services ("Agreement") attached as APPENDIX A to the RFQ/P. [INSERT RESPONDENT'S NAME] has reviewed the Agreement, including the indemnity provisions and insurance provisions contained therein. If given the opportunity to contract with the District, [INSERT RESPONDENT'S NAME] has objections to the use of the Agreement, listed as follows: [IDENTIFY ALL OBJECTIONS; REFER TO APPENDIX (TAB 9) IF NEEDED]."

- Certify that no official or employee of the District, nor any business entity in which an official of the District 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 District.
- Certify that no official or employee of Respondent has ever been convicted of an ethics violation.
- Include verification as follows: "*By virtue of submission of this Submittal, [INSERT RESPONDENT'S NAME] declares that all information provided is true and correct*."

2. Business Information

- Company name.
- Address.
- Telephone and fax.

- Website.
- Name and email of main contact.
- Federal Tax I.D. Number.
- License Number.
- Type of organization (e.g., corporation, partnership, etc.). If a joint venture, describe the division of responsibilities between participating firms, offices (location) that would be the primary participants, and percentage interest of each firm.
- A brief description and history of the firm, including number of years the firm has been in business and date firm was established under its given name.
- Number of employees.
- Location of office where the bulk of services solicited will be performed.
- State of California certification for Respondent of Small Business or Disabled Veteran Business Enterprise status, if any.

3. Relevant Qualifications

- Provide a statement demonstrating your firm's or team's ability to accomplish the scope of services in a comprehensive and thorough manner with an aggressive schedule.
- Describe your firm's approach to and experience with state and other agencies involved in the planning and design process for K-12 and other school projects, in particular, the State Department of Education, the Division of the State Architect, and the Office of Public School Construction.
- Describe your firm's capabilities in valuating/reporting on program status to District staff, Board, and the public.
- Describe your firm's experience with design-build and lease/lease-back projects, and energy savings projects.
- Demonstrate your firm's flexibility in adapting to the changing needs and priorities of a K-12 school district.
- Describe how your firm approaches modernization versus new construction projects.
- Describe your firm's approach to quality control/assurance procedures, including ability to monitor consultants.
- Identify established methods and approaches utilized by your firm to successfully meet completion deadlines and provide examples demonstrating effective use of stated methods and approaches.
- Provide a statement of your firm's work plan including your firm's present workload and number of current projects, and where possible, projected workload for the coming two (2) years, which should include available staff.

4. Relevant Experience

- Provide information about prior program/project management services furnished by your firm in the last ten (10) years on a minimum of three (3) K-12 bond programs, and list the following for each program:
    - Program name and location.
    - District name and name of contact person, title, telephone number, and email address to be contacted for a reference.
    - Main program elements.
    - Size of program.
    - Key individuals of the firm involved and their roles in the program.
    - Briefly state relevance of programs included for consideration in this RFQ/P.

5. Team Summary

- Identify key team members, including subconsultants, and state their qualifications relevant to the scope of services for the project(s).
- Each Submittal must include evidence that the Respondent is legally permitted and properly licensed for the scope of work and to conduct business in the State of California.
- The District expects that the team shall remain intact through the duration of the project(s). If a team member must leave, the District reserves the right to approve that team member's replacement.

6. Litigation History

Provide a comprehensive five (5)-year summary of the firm's litigation, arbitration and negotiated/settled history with previous clients. State the issues in the litigation, the status of the litigation, names of parties, and outcome. A Submittal failing to provide the requested information on lawsuits or litigation, including responses which assert attorney-client privilege instead of providing the information requested, will be considered non-responsive and will not be evaluated.

7. Form of Agreement

Any Respondent selected based on this RFQ/P process must be able to execute the District's form of Agreement for Program/Project Management Services ("Agreement"), which is distributed with this RFQ/P as **APPENDIX A** and incorporated herein by this reference. Any objections/proposed changes to the form of agreement shall be stated in writing in the submittal. An explanation of the objection and proposed revised language shall be provided. The District will not consider any objections/proposed changes to the agreement that are raised after the deadline for submittals. Respondents must provide proposed language in redline, merely providing comments or objections is not acceptable.

8. Fee Proposal

The final form of the Agreement will incorporate the final scope of services and not-to-exceed fee, which shall be negotiated if a Respondent is selected for a project or projects by the District.

Accordingly, Respondents should include a general fee proposal that will enable future consideration by and negotiation with the District. The fee proposal shall include hourly billing rates by position (proposed), staffing plan (proposed), and reimbursable schedule (proposed). Proposal shall provide a Schedule of Rates ("SOR") by position, by company entity, for each position proposed by Respondent. The SOR should identify proposed reimbursables by category. Travel and related expenses shall be reimbursed in accordance with the federal government Joint Travel Regulation.

9. Appendix

- Non-Collusion Declaration. (**APPENDIX B**.)
- Iran Contracting Act Certification, if fees will exceed $1 million. (**APPENDIX C**.)

VII. SELECTION PROCESS

The District's selection committee will evaluate all submissions. Each Submittal must be complete. Incomplete Submittals will be considered nonresponsive and grounds for disqualification. The District retains the sole discretion to determine issues of compliance and to determine whether a Respondent is responsive, responsible, and qualified. Based upon the information presented in the submissions, the District may elect to conduct interviews with some or all of the Respondents. After the interviews, if any, the District will identify the Respondent(s) selected based on the criteria set forth below.

A. Criteria

The criteria for evaluating submissions may include, without limitation, the following:

- Firm's management experience, including successful experience with similar bond programs and projects for California K-12 school districts, including successful experience with DIR, DSA, OPSC, modernization and new construction projects; experience with presentation of reports to governing bodies; experience with project delivery systems other than design-bid-build; energy management/conservation experience; experience with information technology and telecommunications projects.
- Experience of proposed key personnel.
- Assessment of the firm's approach or methodology, including, without limitation, the firm's experience with preconstruction support, scheduling, and budgeting, and skill, creativity, and experience in problem-solving.
- Knowledge of the community and local construction market.
- An evaluation of the firm's proposed fee.
- Quality of interview responses.
- Firm's successful experience developing and implementing programs for California K-12 public school districts, including the types of delivery methods, experience with

budgeting and value engineering, and experience with scheduling and solving scheduling challenges.

B. Interviews

The District, at its sole discretion, may elect to interview selected Respondents. If a Respondent is requested to come for an interview, the key proposed program staff will be expected to attend the interview. The interview will be an opportunity for the District to review the Submittal and any other matters the District deems relevant to its evaluation. Any objections/proposed changes to the form of Agreement attached hereto as **APPENDIX A** shall be stated in writing in the Submittal and may be the subject of inquiry at the interview. The District will not consider any objections/proposed changes to the Agreement that are raised after the deadline for Submittals.

C. District Investigations

The District may perform investigations of Respondents that extend beyond contacting the references identified in the Submittals. The District may request a Respondent to submit additional information pertinent to the review process. The District also reserves the right to investigate and rely upon information from other available sources in addition to any documents or information submitted.

VIII. FINAL DETERMINATION AND AWARD

The District reserves the right to contract with any entity or entities responding to this RFQ/P for all or any portion of the work described herein, to reject any Submittal as non-responsive, and/or not to contract with any Respondent 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. The District reserves the right to contract with any firm not participating in this process. The District shall in no event be responsible for the cost of preparing any Submittal in response to this RFQ/P, including any supporting materials.

Award of the contract(s) is at the sole discretion of District. District may, at its option, determine to award contract(s) only for portions of the scope of work identified herein. In such case, the successful firm(s) will be given the option not to agree to enter into the Agreement and District 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, District will retain the right to enter into negotiations with any other firm responding to this RFQ/P.

WE THANK YOU FOR YOUR INTEREST!

APPENDIX A

Form of Agreement

See attached.

APPENDIX B

NON-COLLUSION DECLARATION
(Public Contract Code Section 7106)

The undersigned declares:

I am the _____ of _____, the party making the foregoing
[Title] [Name of Firm]
bid/proposal.

The bid/proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The bid/proposal is genuine and not collusive or sham. The bidder/proposer has not directly or indirectly induced or solicited any other bidder/proposer to put in a false or sham bid/proposal. The bidder/proposer has not directly or indirectly colluded, conspired, connived, or agreed with any bidder/proposer or anyone else to put in a sham bid/proposal, or to refrain from bidding/proposing. The bidder/proposer has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid/proposal price of the bidder/proposer or any other bidder/proposer, or to fix any overhead, profit, or cost element of the bid/proposal price, or of that of any other bidder/proposer. All statements contained in the bid/proposal are true. The bidder/proposer has not, directly or indirectly, submitted its bid/proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, depository, or to any member or agent thereof, to effectuate a collusive or sham bid/proposal, and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a bidder/proposer that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the bidder/proposer.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on _____,
[Date]
at _____, _____.
[City] [State]

Date: _____
Proper Name of Bidder/Proposer: _____
Signature: _____
Print Name: _____
Title: _____

END OF DOCUMENT

APPENDIX C

IRAN CONTRACTING ACT CERTIFICATION
(Public Contract Code Sections 2202-2208)

Prior to bidding on or submitting a proposal for a contract for goods or services of $1,000,000 or more, the bidder/proposer must submit this certification pursuant to Public Contract Code section 2204.

The bidder/proposer must complete **ONLY ONE** of the following two options. To complete OPTION 1, check the corresponding box **and** complete the certification below. To complete OPTION 2, check the corresponding box, complete the certification below, and attach documentation demonstrating the exemption approval.

☐ **OPTION 1.** Bidder/Proposer is not on the current list of persons engaged in investment activities in Iran created by the California Department of General Services ("DGS") pursuant to Public Contract Code section 2203(b), and we are not a financial institution extending twenty million dollars ($20,000,000) or more in credit to another person, for 45 days or more, if that other person will use the credit to provide goods or services in the energy sector in Iran and is identified on the current list of persons engaged in investment activities in Iran created by DGS.

☐ **OPTION 2.** Bidder/Proposer has received a written exemption from the certification requirement pursuant to Public Contract Code sections 2203(c) and (d). *A copy of the written documentation demonstrating the exemption approval is included with our bid/proposal.*

CERTIFICATION:

I, the official named below, CERTIFY UNDER PENALTY OF PERJURY, that I am duly authorized to legally bind the bidder/proposer to the OPTION selected above. This certification is made under the laws of the State of California.

Vendor Name/Financial Institution (Printed)	*Federal ID Number (or n/a)*
By (Authorized Signature)	
Printed Name and Title of Person Signing	*Date Executed*

END OF DOCUMENT