

LAKE TAHOE UNIFIED SCHOOL DISTRICT

Request for Statement of Qualifications Architectural Services for Various Projects

Due Date.....February 8, 2017
Time..... 4:00 p.m.
Place.....1021 Al Tahoe Boulevard, South Lake Tahoe, CA
Contact.....Billy Wessell, Chief Business & Operations Officer

Submittal Instructions: Complete proposals must be mailed or hand-delivered to the above address in a sealed envelope prior to the date and time specified. Late submittals will not be accepted. In addition to your complete firm name and address, please annotate the envelope as follows: REQUEST FOR STATEMENTS OF QUALIFICATIONS FOR ARCHITECTURAL SERVICES.
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INFORMATION PACKAGE

REQUEST FOR STATEMENT OF QUALIFICATIONS ARCHITECTURAL SERVICES

The Lake Tahoe Unified School District is requesting a Statement of Qualifications from architectural firms for design services of a number of new construction projects on existing school sites. A comprehensive listing of the potential projects is referenced in Exhibit II. These projects consist of additional facilities and replacement facilities on existing school campuses.

If your firm is interested in being considered for this project by the District, please submit six copies of your completed Statement of Qualifications to:

Billy Wessell
Chief Business & Operations Officer
Lake Tahoe Unified School District
1021 Al Tahoe Boulevard
South Lake Tahoe, CA 96150

Completed Statement of Qualifications must be received no later than 4:00 p.m. on Wednesday, February 8, 2017. The District will not review submittals received after this time and date. Facsimile (FAX) copies of the Statement of Qualifications will not be accepted. The Board of Education reserves the right to accept or reject any and all Statement of Qualifications, to negotiate with any or all-responsible firms, and to waive any informality in the process. The District is not responsible for any expenses related to the preparation or presentation of the Statement of Qualification, including travel costs. The District reserves the right to create a pool of architects from which architect for some or all of the projects described herein may be selected.

The Statement of Qualifications may be withdrawn by the firm submitting the Statement at any time prior to the closing date and time for receipt of Statement of Qualifications.

In order to control information disseminated regarding this Request for Statement of Qualifications, organizations interested in submitting Statement of Qualifications are directed not to make personal contact with members of the Board of Education or District Administration with the exception of the individual, or department staff listed above. This includes unauthorized visits to District educating facilities.

This Request for Statement of Qualifications does not commit the Lake Tahoe Unified School District to award a contract or pay any costs incurred in the preparation of a response to this request. The District reserves the right to accept all or part of any responses or to cancel in part or in its entirety this Request for Statement of Qualifications. The District further reserves the right to accept the response that it considers to be in the best interest of the District.

To conserve energy and natural resources, and to improve the safety, comfort, and health of staff and students, selected architects are encouraged to include elements of sustainable design in the District's projects. Considering sustainability early in the design process, in an integrated manner, will allow the architect to meet multiple objectives consistent with Board Policy 3511 (Attachment B).

The attached documents outline the required submittal information as well as the selection criteria to be used by the District. If you have any questions, please contact the Chief Business & Operations Officer at (530) 541-2850 Ext. 1046. Only staff members within this department are authorized to answer questions or provide information relating to this document.

PART I SUBMITTAL REQUIREMENTS

The Statement of Qualifications shall respond to each item noted below, within the specific format described. Please limit response information to relative information only. Supplemental brochure information will not be accepted and may result in the disqualification of the submitting firm.

1. COVER LETTER/LETTER OF INTEREST

Must include name of firm, address, telephone number, fax number, email address, home page URL, type of firm (i.e., corporation), California Registration Number and name of Principal to contact. Letter must be signed by representative of firm with authorization to bind firm by contract. (Maximum of 2 pages.)

2. FIRM ORGANIZATION, CREDENTIALS, BACKGROUND

Provide a brief history of the firm including the following information:

- Number of years in business and date established. If name was changed, please provide previous firm name and explain.
- Indicate the number of years experience this firm has in K-12 school design and construction in California.
- Location of office in which work will be performed.
- Identify potential staff that would work on Lake Tahoe Unified School District Projects.
- List of basic services provided by firm.
- List of additional services provided by firm under a standard agreement, i.e. printing and distribution of plans and specifications, assistance in selecting laboratories and inspectors (if applicable).
- Total number of staff in the office identified above that are experienced in working with the *State School Facilities Program*.
- Given the existing and planned workload of your office staff, does your firm have the capacity to handle additional work and meet tight schedules and deadlines if necessary?

3. PROJECT TEAM

A. Identify the following key Team Members, years with the firm and provide their discipline and registration numbers:

- Principal(s) in Charge
- Senior Staff Managers
- Project Architect
- Contract Administrator
- State Agency Advocate or Advocacy Consulting Firm
- Any additional team members of interest that could be of service

Personnel presented in the proposal, at the interview and/or time of contract signing, on each project, are expected to be involved throughout the life of the project.

- B. Exhibit II of this document identifies a number of District projects that are applicable under this RFQ, and some of these projects may unintentionally result in a tight timelines. Given your current and planned workload does your firm have the capacity to handle additional projects in an expedient manner to meet scheduled deadlines?
- C. Please describe how work is organized in your firm to assure the District that individuals assigned to our projects(s) are not burdened with work on other projects.

4. FIRM RESOURCES

A. Design Capabilities:

What is your design philosophy?

- Describe a situation that demonstrates your firm’s ability to design within the project budget and stay within allowable building costs by utilizing a cost effective design.
- Please describe the unique strengths that your firm can bring to the District’s projects and how these set your firm apart from others.
- Describe a situation that demonstrates your firm’s ability to solve difficult problems concerning site or space utilization, both aesthetically and economically.
- Describe your firm’s ability and experience with the coordination of educational specifications as required by the State Department of Education. Explain your firm’s ability to communicate with and assist the District’s design committee (composed of teachers, administrators and community members).
- Describe your firm’s experience with life-cycle costing methods for evaluating the cost and benefits of alternative energy systems over the life of the proposed project.
- Describe your firm’s ability to incorporate value engineering into a design, when necessary, to reduce construction costs as a portion of the basic service. Does your firm outsource this component of design?
- Explain your firm’s experience with constructability reviews. Does your firm (and its staff) support this method of cost evaluating projects? Does your firm consider changing specific items to avoid cost overruns or change orders prior to bidding, an additional service?
- What is your firm’s experience in “sustainable” or “green” construction practices for school facilities?
- What is your firm’s experience with TRPA and high altitude environments?
- Describe your firm’s techniques for marketing projects and developing bidder interest.

B. Technical & Construction Administration Capabilities:

- SFP Program
 - Experience in establishing modernization baseline eligibility
 - Experience in establishing eligibility for a currently closed site
 - Experiences with the transfer of eligibility between school sites
 - Ingenuity in developing joint use, CTE and childcare project funding sources (as well as design)
- Cost Estimate History:
 - Please identify (from project’s listed on Exhibit I) your firm’s five most

recently bid projects of any kind and show the relationship between the Cost Estimate and the actual bid amount.

- Change Order History:
 - How does your firm handle the change order process? What methodology does your firm utilize to determine the validity and cost responsibility of a change request during construction?
 - Describe your firm's process for keeping the District updated on change order types and totals throughout the project.
 - Please present an additional chart displaying the total changes on five of your firm's most recently completed school projects and indicate whether the change orders were requested by the district, architect, contractor, or unforeseen condition. What was the total percentage of all change orders at completion of the project?
 - What percentage of the change orders were due to changes requested by the District after the initial plans were approved?
 - What percentage of your firm's change orders are due to errors and omissions versus owner-requested?
- Project Scheduling:
 - Describe an example of your firm's recent history in meeting a tight design schedule and timelines set forth by a K-12 school district project. Please identify any actions or creative design components that allowed a project to stay on schedule. How did you firm assist with the State approval process?
- Quality Control/Assurance Procedures:
 - Describe your firm's procedures for checking plans for coordination between plan layers (and various engineering disciplines), to assure clean drawings, prior to DSA plan review and bidding.
- Experience with Federal, State and Local Agencies.
 - Describe your firm's knowledge of the submission process at the Office of Public School Construction and your ability to adjust and interpret the necessary format of submission documentation requirements for a timely application submission.
 - Describe your firm's relationship with DSA and ability to reduce possible delays during the submission and back check stages.
 - When is a school district required to receive CDE plan approval? Please briefly describe the process and what elements CDE staff is looking for.
 - Describe your understanding and/or experience of School Facilities Program requirements.
- Cost Containment:
 - Describe how your firm would implement measures to manage and/or reduce construction costs.
- Construction Administration:
 - What is the scope of project management services provided by your firm during construction?
 - Please explain how your firm plans to provide services to the District on a day-to-day basis and avoid delays that normally occur whenever there is a design conflict or unforeseen condition that needs to be addressed.
 - Describe your method of response to District requested program design changes, to a field clarification, and to a change request.
 - Describe your firm's experience working with construction managers.
 - What is your firm's role upon the completion of construction? Please describe

your experience managing punch list items to assist the District with immediate completion of the punch list items and the enforcement of the contractor's guarantee/warrantees.

- What is the normal or average time required for your firm to respond to an RFI from a contractor?
- What is the normal or average time required for your firm to close out a project with the DSA.
- Project Close Out
 - 1. Describe your responsibilities at construction completion. Include your methods for reviewing and resolving punch list items and confirming that equipment and other elements of the project function properly.
 - 2. Describe your process for obtaining DSA certification.

5. CONSULTING RESOURCES

- A. Identify the proposed consulting disciplines (i.e. structural, mechanical, electrical and civil engineers) associated with your firm. List the names, California registration numbers, business address; phone numbers, fax numbers, email address, and homepage URL, as well as the date established, and time associated with your firm. Identify the number and type of each project completed in association with each consulting firm in the last five years.

6. FINANCIAL RESOURCES

- Provide credit references.
- Please provide a copy of the errors & omissions and professional liability insurance carried by your firm.
- Please describe or provide your firm's fee philosophy for professional services. Is your firm willing to negotiate on your proposed fee structure? Is your firm willing to sign a contract based on a fixed fee?

7. RELEVANT EXPERIENCE

- Please complete Exhibit I (attached). In this spreadsheet we have asked that your firm provide the total number and dollar amount of K-12 school projects completed by your firm (LPP, SFP, bond and other programs) within the last five years (Since 2012). Please identify whether the project was a new construction or modernization project. Please do not list projects under \$500,000.
- Please identify on Exhibit I the total number of projects under contract or completed by your firm that are applying or were funded by the School Facility Program.
- Many of the upcoming LTUSD projects are new buildings or modernization of existing buildings on existing school campuses. Please provide any photographic representations of projects listed in Exhibit I that you believe represent any creative design elements or master planning expertise for these type of projects. Feel free to write a short explanation of the project and what solutions your design created.
- Number of projects in progress by your office at this time. What percentage of these projects are K-12 school related?
- Describe your commitment to energy conservation and sustainability and how you view sustainability in relation to the design of existing buildings. Include your familiarity with new emerging energy technologies, such as high-performance glazing, waste energy recovery, HVAC controls, etc.

- Include your firm’s knowledge of the U.S. Green Buildings Council’s Leadership in Energy and Environmental Design™ (LEED) rating system and its design implications.
- Describe your firm’s ability to incorporate green building technologies.
- Describe your firm’s experience with:
 - Information sharing technology, such as Building Information Modeling (BIM)
 - Collaborative High Performance Schools (CHPS)
 - Achieving LEED™ ratings for completed building projects. Include your experience with analysis tools such as EPA Energy Portfolio Manager.
- Describe your familiarity and experience with techniques to minimize and recycle construction waste; the use of water-conserving fixtures and appliances; indigenous landscaping; wastewater recovery and rainwater collection systems.

8. CLIENT SATISFACTION/REFERENCES

The Lake Tahoe Unified School District may contact previous clients in regard to the following answers. If your firm requests that we not contact the Client Reference, please explain the reasoning for your objection.

- Has your firm ever been terminated by a district or other client during the course of any project? If so, explain.
- List the last four education clients for whom your firm has performed school design services. References must include:
 - School district name, address.
 - Contact name, phone number.
 - Identify project(s) for referral (list school principal name and phone number).
 - OPSC and DSA project numbers.
- *Does your firm attempt to meet the participation goal of at least 3% for Disabled Veteran Business Enterprises (DVBE)? If so, please explain.

* Information regarding the Disabled Veteran Business Enterprises may be acquired on the internet address www.osmb.dgs.ca.gov/ or by calling (916) 323-5478.

9. LEGAL

- A. Please respond to each of the following questions:
- Is there now any pending legal action alleging violation of the law in connection with any projects your firm is involved with? If so, please describe such pending action.
 - Have there been any settlements or judgments involving such actions within the last seven (7) years? Please describe each such settlement or judgment, including the nature of the action and the amount of recovery.
- B. Insurance.
- Architects awarded a contract must provide Certificates of Insurance showing evidence of general and professional liability insurance coverage carried by your firm.
- C. Architect’s Declaration. Complete and sign the attached declaration (Attachment A) in compliance with State of California Public Contract Code, State of California Government Code sections 4525-4529.5; and California Education Code 17076.11.

PART II SELECTION PROCESS & CRITERIA

A Selection Advisory Committee will evaluate and select those firms deemed to be the most highly qualified to perform the required services. If you answer the above sections appropriately, these considerations will be included:

Specialized, sustainable design and technical competence of the firm, including a joint venture or association, regarding the type of services required.

Capacity and capability of the firm to perform the work, to include any specialized services, within the District's timelines.

Past record of performance on contracts with government agencies or private industry with respect to such factors as control of costs, quality of work, incorporating green technology, and ability to meet schedules.

The Selection Committee may contact references and client lists provided by the firm.

The Selection Advisory Committee may choose to interview any, all, or none of the respondents as may be in the best interest of the District. If interviews are held, selected firms will be notified as to place, time, date and purpose of the interview.

The names of all firms submitting proposals and the names, if any, selected for interview shall be public information. At the conclusion of the RFQ process, committee comments and evaluation scores, as well as the contents of all proposals become public information. Firms that have not been selected will be notified in writing after the conclusion of the selection process.

All Statement of Qualifications received by the specified deadline will be reviewed by the Lake Tahoe Unified School District for content, completeness, experience and qualifications. Statements of Qualifications received from architectural firms whose Architect of Record has provided similar services to public school districts within 50 miles of South Lake Tahoe shall receive ten bonus points.

The Lake Tahoe Unified School District reserves the right to select the Statement of Qualifications, which, in its sole judgment, best meets the needs of the District.

SELECTION CRITERIA

- A. Responsiveness to Request for Statement of Qualifications - breadth and depth of response.
- B. Professional reputation of firm.
- C. Satisfaction of current/prior clients (References).
- D. School design experience including recent processing of plans through DSA and availability to provide necessary documentation for OPSC submission.
- E. Accuracy of firm's cost estimate history and ability to design within budget and implement cost saving procedures.
- F. Proven experience related to project management responsibilities and ability to work as a team with contractors, construction managers and various district personnel.
- G. Ability to deliver effective architectural services working under successive deadlines and schedule constraints.

EXHIBIT I

List the school projects, any level, in production, under construction or completed by your firm in the last five (5) years. – See criteria above in Section 7, RELEVANT EXPERIENCE.

PROJECT NAME & DSA NUMBER(S)	K-12 CLIENT AND CONTACT NAME	COST GROUP	CURRENT DESIGN OR CONSTRUCTION STATUS	IF COMPLETE TOTAL CHANGE ORDER PERCENTAGE.

- Group I \$ 500,000 - \$1,000,000
- Group II \$1,000,000 - \$5,000,000
- Group III \$5,000,000 - \$10,000,000
- Group IV Above \$10,000,000.

EXHIBIT II

Lake Tahoe Unified School District *Minimum Essential Facilities Project List*

School Site	Project Description
Al Tahoe	Potential Green Design Projects
	<ul style="list-style-type: none"> • Conversion of relocatable classroom facilities into permanent master planned building at all sites
	<ul style="list-style-type: none"> • Entry storefront and door upgrades
	<ul style="list-style-type: none"> • Cafeteria improvements
	<ul style="list-style-type: none"> • Exterior sewer line replacement
	<ul style="list-style-type: none"> • Boiler Replacement
	<ul style="list-style-type: none"> • Well System: Change potable water supply to STPUD
	<ul style="list-style-type: none"> • Paint exterior of school
	<ul style="list-style-type: none"> • HVAC DDC control upgrades
	<ul style="list-style-type: none"> • Fire alarm/panel upgrade
	<ul style="list-style-type: none"> • UPS phone & data upgrade
	<ul style="list-style-type: none"> • Exterior overhang soffit repair
	<ul style="list-style-type: none"> • Classroom floor covering replacement
	<ul style="list-style-type: none"> • Window glazing and upgrades
	<ul style="list-style-type: none"> • Joint-Use facilities
	<ul style="list-style-type: none"> • Child Care facilities
	<ul style="list-style-type: none"> • CTE facilities

ATTACHMENT A

ARCHITECT'S DECLARATION

The undersigned Architect, in accordance with State of California Public Contract Code, Government Code and Business and Professions Code, declares the following to be true, to the best of his (or her) knowledge and belief, for the firm, persons and consultants listed in this Statement of Qualifications:

That all firms and persons listed are acting under appropriate and valid licenses and that all licenses are in good standing.

That the firm is experienced in projects of similar size, complexity, scope and nature and that listed persons and consultants are sufficiently experienced to perform the work.

That the firm has the experience, competency, financial means and capacity to complete the work.

That the firm and the consultants are properly insured (GL and E&O) as required for the various work described herein.

That the firm, persons listed and consultants:

Have not been convicted of false or fraudulent statements to a public agency within the last five (5) years.

Will comply with applicable laws, regulations and ordinances.

Have submitted information in this Statement of Qualifications that is true and accurate to the best of their knowledge and belief.

Agrees to furnish services and materials as required by the terms and conditions of this Request for Qualifications.

Name of Firm Street Address

City, State, Zip code Telephone and Fax Authorized Signature Printed Name and Title Date

ATTACHMENT B

[Lake Tahoe USD](#) | BP 3511 Business and Noninstructional Operations

Energy And Water Conservation

The Board of Education is committed to reducing the district's demand for electricity and water in order to help conserve natural resources and to save money to support other district needs. To that end, the Board shall establish goals to help reduce the district's energy and water consumption.

The Superintendent or designee shall establish an energy efficiency program which shall include specific strategies designed to help the district use energy more efficiently and to help ensure that funds intended for student learning are not diverted to cover energy costs. As part of the energy efficiency program, the Superintendent or designee shall develop an emergency action plan to address actions to be taken in the event of power outages in schools, both during and after school operations. The action plan shall also address the role of staff, students and parents/guardians in helping to conserve resources and other activities to help the district meet energy reduction goals.

(cf. [3516](#) - Emergencies and Disaster Preparedness Plan)

(cf. [3516.5](#) - Emergency Schedules)

The Superintendent or designee shall analyze the effect of a utility rate increase on the district's budget. He/she shall develop and implement any necessary contingency plans.

(cf. [3100](#) - Budget)

The Superintendent or designee shall regularly inspect district facilities and operations and make recommendations for maintenance and capital expenditures which may help the district reach its energy and water conservation goals.

(cf. [7111](#) - Evaluating Existing Buildings)

The Superintendent or designee shall make every effort to identify funding opportunities and cost-reducing incentive programs to help the district achieve its conservation goals. The Superintendent or designee shall periodically report to the Board on the district's progress in meeting energy and water use reduction goals.