

TUSTIN UNIFIED SCHOOL DISTRICT

RFP No. 359

REQUEST FOR PROPOSALS

FACILITIES MASTER PLAN UPDATE



Request Issuance Date: April 28, 2023

Contact for Submitting Responses: Tustin Unified School District
Attn: Jairo Herrera
1302 Service Road
Tustin, CA 92780
jherrera@tustin.k12.ca.us

Deadline for Submitting Questions: May 11, 2023

Deadline for Submitting Responses: May 25, 2023

PART A. BACKGROUND/SCOPE OF WORK

The Tustin Unified School District (District) is seeking proposals from qualified architectural firms (Architect) to update its Facilities Master Plan (Facilities Master Plan Update). The existing Facilities Master Plan was originally prepared in 2019 (Original Master Plan).

The District desires to update the Board and Community on current facilities, reflecting changes that have occurred since 2019, including (but not limited to):

- Program changes/requirements at the Federal, State and District level (e.g., universal transitional kindergarten, mental health facilities, community facilities, etc.);
- Facilities-related work performed (including construction and deferred maintenance);
- Enrollment/demographic changes; and
- District priorities.

The District anticipates that The Facilities Master Plan Update will follow the same format as the Original Master Plan, with new and updated information incorporated. The Original Master Plan can be reviewed by following the link below:

https://tustin-my.sharepoint.com/:f:/g/personal/trizzuti_tustin_k12_ca_us/Egw2tt3WwBZMhBV2SscVILwBRMj0SRRvQe7W2uwi1zBVdQ?e=ZjwRez

The Architect will be expected to:

1. Review, update, and supplement existing documents.
2. Consult with District staff on work that has occurred since 2019.
3. Consult with District staff on goals, priorities, and future programs to be considered.
4. Conduct follow-up visits and facilities assessments as required.
5. Conduct outreach to the Board of Education, District administrators, school site administrators, staff, and the community to solicit feedback. This process will be guided by a District steering committee, with which the Architect will be expected to work closely. Feedback shall be incorporated into each sites' narrative.
6. Review and update enrollment/demographic information as needed. Update facilities needs recommendations as needed.
7. Update estimated costs by site. Cost estimates shall be categorized to facilitate clear scope decisions for future work.
8. Prepare comprehensive presentations for the Board of Education and community groups.
9. Facilitate communication of the Facilities Master Plan findings and recommendations. Ideally, methods such as web site, social media, etc. will be employed.
10. Schedule of work to be determined.

PART B. ANTICIPATED TIMELINE FOR PROPOSALS

The District anticipates that the selection process will occur in accordance with the timeline set forth on the cover page to this RFP and as set forth below in this Part. However, although timing is of critical

importance, the District may alter dates and times specified below as the District, in its sole discretion, determines necessary and/or appropriate.

PART C. REGISTRATION WITH DISTRICT REQUIRED

As a condition precedent to submitting a Response, an Architect must register with the District as provided in this Part. By registering, the District will be able to inform the Architect in the event the District issues any addendum to this RFP or responds to any questions regarding this RFP. To register, an Architect must submit, via email to the District's RFQ/RFP Administrator (see Part G of this RFP), all of the following: (i) a request that the Architect be registered with the District specifically for purposes of "RFP Number 359"; (ii) the Architect's full legal name; and (iii) the name, title, mailing address, telephone number, and email address of the Architect's authorized contact person for purposes of this RFP.

PART D: ADDITIONAL INFORMATION FOR ARCHITECTS

1. Addenda to RFP.

The District may issue one or more addenda to this RFP, and the District will provide notice of each addendum to each Architect that has registered with the District as provided in Part C of this RFP, using the email address provided by the Architect when it registered. Addenda issued by the District will be available for review on the District's website. Each architect is solely responsible for reviewing and must, in its Response, acknowledge each addendum issued by the District. Failure by an Architect to acknowledge any and each addendum issued by the District is grounds for rejection of the Architect's Response.

2. Modification or Withdrawal of Response.

At any time prior to the Deadline for Submitting Responses, an Architect may: (i) modify its Response by submitting the modified Response together with a written request to withdraw the original Response and replace it with the modified Response; or (ii) withdraw its Response by providing written request for withdrawal to the District.

3. Responsibility for Costs.

Each Architect shall be responsible for paying any and all costs that it incurs in connection with the preparation and submission of its Response, together with any and all expenses associated with travel to and/or participation in any interview or other meeting or presentation. In no event will the District reimburse any Architect for any such costs or expenses.

4. Disclosure of Responses.

The District will consider each Response to be a public record, which the District may disclose in accordance with California law or otherwise. In that regard, Responses shall not be deemed or construed to include any proprietary or other confidential information, and the District shall not be

responsible or liable for disclosure of any information included in an Architect's Response that the Architect believes is proprietary or other confidential information.

5. Ownership of Documents and Use of Ideas.

All Responses and other materials submitted in response to this RFP shall become the property of the District, and the District shall have no obligation to return any such materials to the Architect that submitted them. The District may use any ideas set forth in a Response, regardless of whether the District selects the Architect that submitted the Response to perform the services in this RFP.

6. District Review of Services

The District may review or may at any time contract for the services of an independent consultant that will assist the District with, among other things, review of, architectural services received by the District, and contracts for architectural services shall require that the Architect full cooperate with such efforts on an "open book" basis.

7. Unethical Behavior

By submitting a response, an Architect shall be deemed to represent and warrant that neither it or any of its agents or other representatives gave or offered to give any gratuity (in the form of entertainment, money, gifts, or anything else of value) to any District board member, officer or employee, with the intent or goal of obtaining favorable treatment with respect to the selection of the Architect to perform the services contemplated in this RFP. If the District determines that an Architect has breached or violated such warranty, the District may terminate, in whole or in part, ANY contract that it has with such Architect, and the Architect shall be responsible and liable for any associated losses and/or damages incurred by the District. The rights and remedies of the District pursuant to this paragraph are not exclusive and are in addition to any other rights and remedies the District may have pursuant to law or contract.

8. District Rights

The District expressly reserves the rights to: (i) select the Architect that the District is most highly qualified and competent to provide the services contemplated in this RFP; (ii) in its reasonable discretion, reject any Responses that do not comply with the requirements of this RFP; and (iii) reject all Responses, regardless of whether the District issues a new or alternate request for proposals.

PART E: REQUIRED CONTENT OF RESPONSE

In order to be considered responsive to this RFP, an Architect's Response must include all of the information described in this Part E, in the order set forth below.

1. Response Cover (one page).

The cover to a Response may specify only: (i) the number of this RFP as designated by the District (i.e., RFP Number 359); (ii) each addendum to this RFP issued by the District; (iii) the Deadline for Submitting Responses; (iv) the title of the Response, if any; (v) the Architect's company name, contact person, address and telephone number; and (vi) the Architect's logo, if any.

2. Optional Summary Letter (one page).

An Architect may, if desired, include in its Response a letter that briefly summarizes the Response. The letter must be signed by a person with authority to act on behalf of and bind the Architect.

3. Table of Contents (one page).

Include a list of the headings and corresponding page numbers for everything included in the Response that follows the table of contents.

4. Architect Company and Contact information (one page).

Specify: (i) the Architect's full, legal company name; (ii) the Architect's type of legal entity (e.g., corporation, limited liability company, *et cetera*) and the state in which the Architect was organized (e.g., California, Delaware, *et cetera*); (iii) the address and telephone number of the Architect's principal business offices; (iv) the names and titles of, as applicable, the Architect's principal owners and officers; and (v) the address and telephone number of the Architect's business office that, if awarded the contract, will manage and perform services for the District.

5. Key Personnel (one page).

Identify all "key" management and professionals whom the Architect intends to assign to the Facilities Master Plan Update Project, specifying their respective qualifications and experience regarding planning, design, funding, and construction administration of public-school facilities projects in California, with particular emphasis on their experience preparing Facilities Master Plans. Include an affirmative statement that each of such personnel are fully qualified, experienced, and, as applicable, properly and appropriately licensed to perform the services that will be assigned to them. Include individual resumes or profiles for such key personnel, as attachments to the Response.

6. Qualifications and Experience (three pages).

Describe the Architect's qualifications and experience, within the immediately prior ten years, with respect to planning, design, funding, and construction administration for school facilities of California School Districts. Place particular emphasis on qualifications and experience pertaining to the preparation of Facilities Master Plans. Include, in an attachment to the response, a list of Facilities Master Plans for which the Architect has provided services within the immediately-preceding ten-year period, specifying for each project, (i) the name of the school district, (ii) the name and telephone number of the school district's primary contact person for purposes of the project; (iii) the general scope and complexity of the work performed (e.g., content of Facilities Master Plan, number of facilities analyzed, *et cetera*); and (iv) the final, total dollar amount of the Architect's contract.

7. Services Methodology and Philosophy (one page).

Describe the means, methods, and/or processes the architect will implement to determine and fulfill the District's requirements and expectations for the Facilities Master Plan Update Project. Describe how the Architect will provide excellent customer service, as well as the Architect's strength and stability as a business concern, and its advantages over its competitors with respect to the preparation of the Facilities Master Plan Update.

8. Sub-Consultants

Specify any portion of services that will need to be performed by sub-consultants to the Architect, because the Architect does not typically perform those services “in house”. Include an outline of the process that the Architect proposes to use for the selection of sub-consultants that will perform portions of the Facilities Master Plan Update.

9. Proposed Fee

Provide a proposed fee for services, based on the Architect’s understanding of the work to be performed. The proposed fee should be an all-inclusive number covering all aspects of the Facilities Master Plan Update services. Please note that the District will be very limited in the amount of reimbursable expenses it will allow. For example, under no circumstances will the District accept mileage as a reimbursable expense. Architects are advised to prepare their fee proposals accordingly.

10. Additional Information (two pages)

Provide any additional, specific information that the Architect believes is relevant or that the architect could not otherwise fit within the number of pages permitted for the information to be provided pursuant to the foregoing portions of this Part E. Please note, however, that general marketing materials (i.e., information not specifically relevant to performances of Facilities Master Plan update services for the District) are neither necessary nor desired.

11. Certification Regarding Response (one page).

Include a written certification signed by an authorized representative of the Architect as follows: “The undersigned hereby certifies, subject to penalty for perjury in accordance with the laws of the State of California, that: (i) the Architect identified in this Response has duly authorized the undersigned to submit this Response on the Architect’s behalf; and (ii) the information set forth in this Response is all true and correct, and constitutes a complete, unequivocal, and not misleading response to the requirements of the RFP.” The name and title of the person signing the certification must be legibly set forth below the person’s signature.

PART F: EVALUATION OF RESPONSES

1. Evaluation Process

Prior to actually evaluating and ranking the substantive content of a Response, the District may reject the Response if it: (i) is conditional, incomplete, includes irregularities or inconsistencies, or in any manner does not satisfy or conform with the requirements of this RFP; or (ii) as determined by the District, is in any way or to any extent misleading, regardless of whether intentionally, negligently, or otherwise.

The District, in its sole discretion, may designate one or more people to evaluate and score the Responses on behalf of the District, which may include, but is not limited to, District employees, independent consultants, and/or others with relevant qualifications and/or experience.

The District, in its sole discretion, may: (i) schedule and conduct interviews with any one or more of the responding Architects (provided that no Architect shall have the right to be interviewed); (ii) contact and confer with representatives of other entities for which an Architect has provided services or that have provided services to any Architect; (iii) request any additional information from any Architect; (iv) contact any Architect's past or current clients to obtain or verify any information pertaining to the Architect; and/or (v) otherwise seek confirmation of information set forth in any Response. Any information gained by the district as a result of such activities may be used to assist with the selection of an Architect. In the absence of any such activities or information, the District will evaluate and score any particular Response based on the information included in that Response.

Each person evaluating Responses on behalf of the District will independently score each response, using the evaluation criteria set forth in Section 2 of this Part F. If a Response does not satisfy the pass/fail criterion, the District will reject and not further score the Response. Each evaluation category (other than pass-fail) will be awarded a score from zero to a specified maximum number of points. The final score in each evaluation category awarded to an Architect will be the average of the scores determined by the individuals who are evaluating Responses on behalf of the District. Upon completing the evaluation of all Responses, the District will rank Responses from highest ranked to lowest ranked. The highest ranked firm will be contacted and the District reserves the right to negotiate with that firm on any aspect of their Response, including proposed fees. If the District and highest ranked Architect are unable to reach agreement, the District will open negotiations with the next highest ranked firm, *et cetera*.

2. Evaluation Criteria

The District will evaluate and score each Response based on the following criteria/categories:

- (i) **Response Content and Formatting (pass/fail):** To facilitate consistent and efficient review and evaluation by the District, each Response must substantially comply with the content and formatting requirements. Responses that do not so comply may be rejected and not further scored.
- (ii) **Qualifications and Experience (maximum 100 points):** The score awarded for this category may range from zero to 100 points, depending on the District's assessments of the Architects' qualifications and experience specifically relating to facilities master planning services provided to California public school districts.
- (iii) **Services Methodology and Philosophy (maximum 50 points):** The score awarded for this category may range from zero to 50 points, depending on the District's assessments of the Architects' methodologies and philosophies with respect to performing the services described in this RFP while providing excellent customer service. The District will award relatively higher scores to Architects demonstrating that their methodologies and philosophies will result in the District receiving excellent customer service.
- (iv) **Additional Information (maximum 50 points):** The score awarded for this category may range from zero to 50 points, depending on the District's assessments of whether the additional information provided by an Architect demonstrates particular qualifications and experience

with respect to the master planning services desired by the District or otherwise evidences a strong ability to perform the services described in this RFP. The District will review negatively any general marketing materials or other additional information that does not relate to an Architect's experience, qualifications and/or ability to perform the services as are specifically required for the Facilities Master Plan Update.

- (v) **Proposed Fees (maximum 50 points):** The score awarded for this category may range from zero to 50 points, depending on the District's assessments of the proposed fee for the Facilities Master Plan Update services provided by an Architect, relative to proposed fees provided by the other Architects. Scoring will also be based on the District's assessment of whether the proposed fee represents an all-inclusive fee not subject to future changes as well as the amount of proposed reimbursable expenses.
- (vi) **Overall Assessment (maximum 50 points):** The score awarded for this category may range from zero to 50 points, depending on the District's assessments of the Architect's respective qualifications overall, based on the Responses to this RFP and, if applicable, interviews with selected Architects and other information that is made or becomes available for review. Such overall assessment may include, among other things, an evaluation of whether the Architect's key personnel have the interpersonal skill necessary to be a good fit with District personnel.

PART G. QUESTIONS REGARDING THIS REQUEST

1. Submission to District.

Questions regarding this RFP should be set forth in writing and sent via email to the District's RFP Administrator, Jairo Herrera at jherrera@tustin.k12.ca.us, and the email subject line should be specified as "Question Regarding Facilities Master Plan Update Services RFP."

2. Responses to Questions.

The District will, to the extent it is able, respond to questions regarding this RFP that it receives in accordance with Part G. If the District responds to a question, it will send the question and corresponding response to all of the Architects that registered with the District in accordance with Part C of this RFP.

3. Deadline for Questions.

Architects that have registered with the District may submit questions regarding this RFP at any time prior to the Deadline for Submitting Questions. The District, in its sole discretion, may determine not to respond to questions submitted after the Deadline for Submitting Questions or may respond, nonetheless, so that all Architects that have registered with the District will have the benefit of relevant information.

PART H. SUBMITTAL OF RESPONSES

1. Number of Copies

In order to be deemed responsive to this RFP, Architect must submit to the District one electronic copy of its Response, in PDF format. The RFP may be delivered via email or other cloud-based delivery service. The electronic copy or link to the cloud-based file shall be sent to the District's RFP Administrator, Jairo Herrera at jherrera@tustin.k12.ca.us. The District will endeavor to provide confirmation of receipt of the email of file link, however it is ultimately the responsibility of the Architect to confirm the District's receipt of its Response. Alternatively, Responses may be submitted via U.S. mail, courier or personal delivery. The address for such a submittal is:

Tustin Unified School District
Attn: Jairo Herrera
1302 Service Road
Tustin, CA 92780

2. Deadline.

Each Architect shall be solely responsible for ensuring that its Response is received by the District prior to the Deadline for Submitting Responses. The District, in its sole and absolute discretion may, but shall not be required to, consider any Response received by the District after the Deadline for Submitting Responses

Thank you for your interest in working for Tustin Unified School district and we look forward to your participation in the interview process.