

REQUEST FOR PROPOSAL

**RFP 1058 10-22-2021
DEMOGRAPHIC SERVICES**

FOR

STOCKTON UNIFIED SCHOOL DISTRICT

701 NORTH MADISON STREET,

STOCKTON, CA 95202

**Proposals Due
November 2, 2021 at 2:00 PM**

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NOTICE TO PROPOSERS
RFP 1058 10-26-2020
DEMOGRAPHIC
SERVICES

NOTICE IS HEREBY GIVEN THAT THE STOCKTON UNIFIED SCHOOL DISTRICT, will receive sealed proposals for DEMOGRAPHIC SERVICES until Tuesday, November 2, 2021 at 2:00 PM.

The Request for Proposal is located on our website at <https://www.stocktonusd.net/Domain/155> where all instructions can be found. Any questions regarding this notice should be directed to Marcus Battle at MBattle@stocktonusd.net .

GOVERNING BOARD
Stockton Unified School District
San Joaquin County, California
Marcus Battle, Interim Chief Business Official

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 October 29, 2021

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INSTRUCTIONS TO PROPOSERS

No proposal shall receive consideration by the Stockton Unified School District for Request for Proposal (RFP) unless made in accordance with the following instructions:

1. Deadline for Receipt of Proposals - **One (1) copy of the Proposal along with an electronic copy on USB** shall be sealed and filed with the **Purchasing Department** at 701 North Madison Street, Stockton CA 95202, on or before Tuesday, November 2, 2021 at 3:00 PM.
2. Requests for Information - Any questions relative to the proposal regarding documents, discrepancies, omissions or doubt as to meanings should be directed to the Interim Chief Business Official, Marcus Battle at MBattle@stocktonusd.net. All written questions will be answered in writing, and will be made available on the District website at <https://www.stocktonusd.net/Domain/155..>
3. Forms - Proposal shall be made in the format specified by the District. All items should be addressed. Numbers should be stated in figures, and the signatures of all individuals must be in longhand. The submission should be made without interlineations, alterations, or erasures.
4. Non-Collusion Declaration - Each Proposer shall return a fully executed Non-Collusion Declaration, as required by Public Contract Code section 7106, with the completed proposal.
5. Addenda - Any addenda issued shall form a part of the specifications of the RFP. If addenda are issued for this RFP, they will be posted on the District's website, <https://www.stocktonusd.net/Domain/155> and the form for recognizing any addenda is part of this package. If there are no addenda issued, this form will not be required to be included in the proposal package.
6. RFP Price Form - Proposer shall return the RFP Price Form with their proposal.
7. Performance References Form - The Proposer is to furnish the names of at least three (3) agencies (preferably California Public School Districts) served by the Proposer within the past year with requirements similar to the needs of the Stockton Unified School District.
8. Cost of Preparation - All costs for preparation of proposals shall be borne by the Proposer.
9. Retention of Information - The District reserves the right to retain all proposals. The District will not be responsible or liable in any way for any losses that the Proposer may suffer from the disclosure of information or materials to third parties.
10. Withdrawal of Proposals - Any Proposer may withdraw their proposal either personally by written request, telephone conversation or email request confirmed at any time prior to the scheduled closing time for the receipt of proposals.
11. Rejection of Proposals - The District reserves the right to accept or reject any and all proposals. The District reserves all its rights and options including:
 - To reject any and all Proposals that fail to meet the requirements of this RFP;
 - To accept Proposal(s) that are, in the judgment of the District, in the best interest of the District;
 - To request clarification from any Proposer;

- To reject any and all non-responsive Proposals;
 - To waive irregularities in any Proposal that the District may elect to waive;
 - To reject all Proposals without cause;
 - To issue subsequent requests for new proposals; or
 - To discontinue discussions after commencing discussions with a Proposer, and commence discussions with other Proposer(s).
12. Proposal Exception - All exceptions which are taken to the requirements of this RFP must be stated clearly. The taking of exceptions or providing false, incomplete or unresponsive statements may result in the disqualification of the proposal. Allowance of exceptions will be determined by the District.
 13. Proposal Negotiations - A proposal response to any specific item of this RFP with terms such as "negotiable", "will negotiate" or similar, will be considered as non-compliance with that specific term.
 14. Prevailing Law - In the event of any conflict or ambiguity between these instructions and state or federal law or regulations, the latter shall prevail. Additionally, all services to be performed under the proposal shall conform to all applicable requirements of local, state and federal law.
 15. Governing Law and Venue - In the event of litigation, the proposal documents, specifications and related matter shall be governed by and construed in accordance with the laws of the State of California. Venue shall be with the appropriate state or federal court located in San Joaquin County.
 16. Award of Contract - The Governing Board reserves the right to reject any or all proposals, or to waive any irregularities or informalities in any proposals. The award of the contract, if made by the District, will be to the Proposer that is, in the judgment of the District, in the best interest of the District.
 17. Duration of Contract - The District is requesting an initial service period of three (3) years. District shall have the right in its sole discretion to terminate the Agreement for its own convenience. In the event of a termination for convenience, the contractor may invoice District and District shall pay all undisputed invoice(s) for work performed until the notice of termination. This shall be the only amount(s) potentially owing to the contractor if there is a termination for convenience.
 18. Statement of Confidentiality - Responses to this RFP become the exclusive property of the District upon receipt. All proposals received in response to this RFP become a matter of public record and shall be regarded as public records. A Proposer may designate elements in its proposal which are defined as business or trade secrets and plainly marked as "Confidential," "Trade Secret," or "Proprietary."

Although the California Public Records Act recognizes that certain confidential trade secret information may be protected from disclosure, the District may not be in a position to establish that the information that a Proposer submits is a trade secret. If a request is made for information marked "Confidential," "Trade Secret," or "Proprietary," the District will provide the Proposer who submitted the information with reasonable notice to seek protection from disclosure by a court of competent jurisdiction.

19. Bid Protest - A Proposer may protest an award if he/she believes that the award is inconsistent with Board policy, the RFP specifications, or is not in compliance with law. A protest must be filed in writing with the Interim Chief Business Official or designee before 4:00 PM of the third business day following the District's Intent to Award. The Proposer shall submit all documents supporting or

justifying the protest. A Proposer's failure to file the protest documents in a timely manner shall constitute a waiver of his/her right to protest the award of the contract.

Any Proposer submitting a proposal may file a protest of the District's intent to award the Contract provided that each and all of the following conditions are met:

- The protest must be submitted in writing to the District, before 4:00 PM of the third business day following the District's Intent to Award. The initial protest document must contain a complete statement of any and all bases for the protest, including without limitation all facts, supporting documentation, legal authorities and argument in support of the grounds for the proposal protest; any matters not set forth in the written proposal shall be deemed waived. All factual contentions must be supported by competent, admissible and creditable evidence.
- The protest must refer to the specific portions of all documents which form the basis for the protest.
- The protest must include the name, address and telephone number of the person representing the protesting party.

Any bid protest not conforming to the foregoing shall be rejected by the District as invalid. Provided that a bid protest is filed in strict conformity with the foregoing, the District's Associate Superintendent, or such individual(s) as may be designated, shall review and evaluate the basis of the bid protest. Either the District's Associate Superintendent or other individual designated, shall provide the Proposer submitting the bid protest with a written statement concurring with or denying the bid protest within 5 working days. The Associate Superintendent or designee may also convene a meeting with the Proposer in order to attempt to resolve the protest.

The District's Board will render a final determination and disposition of a bid protest by taking action to adopt, modify or reject the disposition of an award as reflected in the written statement of the Associate Superintendent or designee. Action by the District's Board relative to an award shall be final and not subject to appeal or reconsideration by the District, any employee or officer of the District or the District's Board.

The rendition of a written statement by the Interim Chief Business Official or designee, and action by the District's Board to adopt, modify or reject the disposition of the award reflected in such written statement shall be express conditions precedent to the institution of any legal or equitable proceedings relative to the bid process, the District's intent to award the Contract, the District's disposition of any bid protest or the District's decision to reject all bids,

The procedure and time limits set forth in this paragraph are mandatory and are the Proposer's sole and exclusive remedy in the event of bid protest, Failure to comply with these procedures shall constitute a waiver of any right to further pursue the bid protest, including filing a Government Code Claim or legal proceedings.

SPECIFICATIONS

RFP Contents:

Section 1	Purpose of RFP and General Provisions
Section 2	Schedule of Events
Section 3	Scope of Services
Section 4	RFP Response Format
Section 5	Proposal Evaluations

SECTION 1 PURPOSE OF REQUEST FOR PROPOSAL AND GENERAL PROVISIONS

PURPOSE OF REQUEST FOR PROPOSAL (RFP)

The Stockton Unified School District (District) operates under a locally-elected seven-member Board form of government and provides educational services to grades Pre-K - Adult. The District operates elementary schools, middle school, high schools and other programs as well. The District serves approximately 35,000 students, excluding Charters.

The purpose of this RFP is to seek a company that will provide the District with demographer services over the next year (1) year with (2) one year automatic annual renewals. The successful proposer will show how they will be able to provide all services outlined in the scope of services.

This document contains instructions and requirements including the format in which responsive proposals must be submitted. Proposers are urged to carefully read all sections of the RFP to insure that the scope of required services and provider responsibilities is to be fully understood. Proposers shall provide evidence of their expertise, professional management capabilities and qualifications in all areas concerning the service.

QUESTIONS CONCERNING RFP

Any questions, interpretations or clarifications, either administrative or technical about this RFP, must be requested in writing. All written questions will be answered in writing, and will be made available on our website at <https://www.stocktonusd.net/Domain/155>.

Oral statements concerning the meaning or intent of the contents of this RFP by any persons are unauthorized and invalid. All questions, technical, programmatic, or process must be directed to:

Marcus Battle
Interim Chief Business Official
Stockton Unified School District
MBattle@stocktonusd.net

SECTION 2 SCHEDULE OF EVENTS

The following schedule will be used by the District for this RFP.

First Advertisement	October 22, 2021
Second Advertisement	October 29, 2021
End Written Question Period	October 26, 2021 4:00 PM
Deadline for Addressing Written Questions	October 28, 2021 12:00 PM
Proposal Submitted to District	November 2, 2021 2:00 PM
Potential Interviews	November, 2021
Contract Award	November, 2021

SECTION 3 SCOPE OF SERVICES

It is the desire of the Stockton Unified School District to select a vendor that will provide demographic services that works best for our District. The Proposer should fully explain in detail their methodology to accomplish their tasks. Timelines, meetings, District responsibilities and all other important information should be included in this section with clear detail. Proposers should use this section to address the ability of Proposer's firm to undertake the project, considering Proposer's current and anticipated workload.

SECTION 4 PROPOSAL EVALUATIONS

This RFP is designed to select the Proposer that works best for the District. Proposals will be reviewed for content, completeness, experience, qualifications, price, means of providing the service and ability to provide the best solution for the District. By responding to this RFP, Proposer acknowledges that selection will be based on a comprehensive submission that meets or exceeds the District requirements and that lowest responsible Proposer requirements do not apply.

The District reserves the right without limitation to:

- Reject any or all proposed solutions and to waive any minor informalities or irregularities contained in any submission,
- Interview one or more Proposers,
- Enter into negotiations with one or more Proposers,
- Execute an agreement with one or more Proposers based solely on the proposal and any approved additions, and/or
- Enter into an agreement with another Proposer in the event that the originally selected Proposer defaults or fails to execute an agreement with the District.

The District reserves the right to verify any information provided during the RFP process, and may contact references listed or any other persons known to have contracted with the Proposer.

The District shall evaluate proposals based on the criteria listed below:

Proposal Responsiveness	10%
Scope of Services	40%
Proposer References	15%
Price	35%
Total	100%

SECTION 5 PROPOSAL INSTRUCTIONS AND FORMAT

INTRODUCTION

To be considered responsive to this RFP, Proposer shall submit one (1) copy of the proposal and one (1) electronic copy on USB in the format identified in this section. All requirements and questions in the RFP must be addressed and all requested data must be supplied. The District reserves the right to request additional information that, in the District's opinion, is necessary to assure that the Proposer's competence, number of qualified employees, business organization and financial resources are adequate to perform the required services.

PREPARATION

Proposals should be prepared in such a way as to provide a straightforward, concise delineation of capabilities to satisfy the requirements of this RFP. Proposals should emphasize the Proposer's demonstrated capability to perform the required service for the District. Literature describing the proposed products and services and extent of support included in the proposal should be forwarded as part of the proposal. Marketing material alone without explaining how the Proposer would provide a solution to the District would not be considered a responsive proposal.

PROPOSAL FORMAT

The proposal shall include the following elements:

PART I - COVER LETTER

The cover letter shall include a brief statement of intent to provide a solution for the District, and signature of an authorized officer of the organization who has legal authority in such transactions. The cover letter shall provide the name, position, and full contact information including telephone number and e-mail address for the individual designated as the Proposer's contact for this proposal.

PART II - TABLE OF CONTENTS

The table of contents shall identify the contents of the proposal in a format consistent with the proposal requirements and format set forth herein.

PART III - BACKGROUND AND EXPERIENCE

The proposal shall show that the Proposer possesses the demonstrated skills and experience in specific areas of the RFP. The Proposals shall include the following elements:

- 1 Give a background of the company and detail any projects that relate specifically to this RFP.
- 2 List how long the company has been in business conducting this type of service.
- 3 Upon request by the District, a Proposer shall submit promptly to the District satisfactory evidence showing the Proposer's financial resources, the Proposer's experience in the type of work being required by the District, the Proposer's organizations available for the performance of the services and any other required evidence of the Proposer's qualifications to perform the proposed services.

PART IV - REFERENCES

The Proposer shall furnish the names of at least three (3) agencies (preferably California Public School Districts) served by the Proposer within the past 2 years with requirements similar to the needs of the Stockton Unified School District. The Performance References Form is included in the proposal package.

PART V NON-COLLUSION DECLARATION

Proposer shall return a fully executed Non-Collusion affidavit, as required by Public Contract Code section 7106, with the completed proposal. The Non-Collusion Declaration is included in this package.

PART VI - ACKNOWLEDGEMENT OF ADDENDA

Proposer shall acknowledge all Addenda. If there are no addenda issued, this form will not be required to be included in the proposal package.

PART VII- STATEMENT OF WORK/ACTION PLAN

The work plan shall describe how the Proposer would assist the District in reaching its goals as set forth in this RFP. The Proposer should fully explain in detail how they would work with the District and why their solution would be most beneficial to the District. Timelines, meetings, trainings, District responsibilities and all other important information should be included in this section with clear detail.

Proposers should use this section to address the ability of Proposer's firm to undertake the project, considering Proposer's current and anticipated workload.

PART VIII - SCOPE OF SERVICE

It is the intent of the District to enter into an agreement with the successful Proposer for Demographic Services. The successful Proposer will work with the District on the following topics, and will address each of these topics in their proposal.

ENROLLMENT PROJECTIONS

The successful proposer will work with the District and develop accurate enrollment projections for all District locations. The successful proposer will detail their methodology and be able to explain the process that they employ to achieve this outcome.

DEMOGRAPHER PROJECTIONS

The successful proposer will detail their methodology for obtaining demographic projections for the Stockton California area and be able to explain their findings to District staff, the Stockton Unified School District's Board of Trustees and community.

DEVELOPMENT IMPACTS

At least two times per year, or as dictated by individual developer requests, review and evaluate housing developments which are under review in the City of Stockton planning process. Advise District staff as to appropriate attendance area assignments in accordance with SUSD policy.

PRESENTATIONS TO THE BOARD OF TRUSTEES

At a minimum as part of the contracted services, the successful Proposer will be called upon to give up to two presentations per year for the term of the contract to the District's Board of Trustees. Additional presentations may be requested by the Superintendent and/or District's Board of Trustees.

PART IX - RFP PRICE FORM

Proposer shall return a fully executed RFP Price Form, fully executed in accordance with the Instruction to Proposers. The fees shall include the cost of all labor, materials, equipment, supplies and space necessary.

PERFORMANCE REFERENCES

The District reserves the right to reject an offer of any Proposers who previously failed to perform properly; or complete, on time, contracts of a similar nature; or to reject the offer of a Proposer who is not in a position, in the District's opinion, to perform such a contract satisfactorily.

The Proposer is to furnish the names of at least three (3) agencies (preferably California Public School Agencies) served by the Proposer within the past year with requirements similar to the needs of the District.

Client: _____

Address: _____

Contact: _____ Phone: () _____

Email: _____

Client: _____

Address: _____

Contact: _____ Phone: () _____

Email: _____

Client: _____

Address: _____

Contact: _____ Phone: () _____

Email: _____

NON-COLLUSION DECLARATION

State of California)

) ss.

County Of San Joaquin)

I, _____, being duly sworn, declare that I am _____ of _____ the party making the foregoing proposal that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the Proposer has not directly or indirectly induced or solicited any other Proposer to put in a false or sham proposal, and has not directly or indirectly colluded, conspired, connived, or agreed with any other Proposer or anyone else to put in a sham proposal, or that anyone shall refrain from proposing; that the Proposer has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Proposer or any other Proposer, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other Proposer, or to secure any advantage against the public body awarding the contract or anyone interested in the proposed contract; that all statements contained in the proposal are true; and further, that the Proposer has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, proposal depository, or to any member or agent thereof to effectuate a collusive or sham proposal.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Dated this _____ day of _____ 2021 at _____ California.

Signature

ADDENDA

The undersigned acknowledges receipt of the following Addenda and the cost, if any, of such revisions has been included in your proposal. If there are no addenda issued, this form will not be required to be included in the proposal package.

Addenda No. _____ Dated _____

Addenda No. _____ Dated _____

Addenda No. _____ Dated _____

Name of Proposer _____

REQUEST FOR PROPOSAL PRICE FORM

RFP 1058 DEMOGRAPHIC SERVICE

SERVICE DESCRIPTION

ANNUAL PRICING

Enrollment Projections: \$ _____

Locations of Students: \$ _____

Demographer Projections: \$ _____

Development Impacts: \$ _____

Presentations to the Board (up to 2 annually): \$ _____

Demographic Software: \$ _____

TOTAL ANNUAL AMOUNT OF PROPOSAL: \$ _____

ADDITIONAL SERVICES

SPECIAL PROJECTS AS REQUESTED: \$ _____/HOUR

TRAVEL: \$ _____/HOUR

ADDITIONAL PRESENTATIONS: \$ _____/HOUR

MILEAGE FEE: \$ _____/MILE

SIGNATURE

PLEASE TYPE OR PRINT NAME

TITLE

DATE

COMPANY