



56 South Lincoln Street
Stockton, CA 95203
(209) 933-7095 Ext. 2249

REQUEST FOR PROPOSAL
FACILITIES MASTER PLAN AND NEEDS ASSESSMENT STUDY
RFP #24.005 Facilities Master Plan

I. OVERVIEW

The Stockton Unified School District (“District”) is requesting proposals for Facility Master Planning Services to assist the District with the preparation of a comprehensive Facilities Master Plan and Needs Assessment to guide facilities planning and improvements District-wide.

The District seeks a variety of master planning services including: facilities assessment, space planning, facilities management, meeting facilitation, preliminary cost estimating, and cost-benefit analysis for options including changes of use, new construction, and remodeling. Consultants should have experience in facilities master planning for California education facilities and in facilitating innovative and collaborative solutions.

NOTICE TO PROPOSERS

NOTICE IS HEREBY GIVEN that the Stockton Unified School District of San Joaquin County, California, acting by and through its Governing Board, hereinafter referred to as the DISTRICT, will receive up to, but no later than 3:00 PM, Friday, October 6, 2023, sealed proposals for:

RFP #24.005 Facilities Master Plan

Proposals will be received on or before the time and date stated above at the offices of:

**Stockton Unified School District
Purchasing Department
2141 Robindale Ave.
Stockton, CA 95205**

Proposals not received in the Purchasing Department by the specified date and time will be returned unopened. Facsimile (FAX) and/or electronic copies of the proposal will not be accepted. Contracts will be awarded at a later date.

Each proposal must conform and be responsive to all pertinent Bidding and Contract Documents. Copies may be obtained from <https://www.stocktonusd.net/Domain/155> or the Purchasing Department office. The contract will be awarded to the most responsible, responsible bidder or bidders based on the criteria noted in the proposal. The District reserves the right to reject any or all proposals, and to waive any errors or corrections in a proposal or in the proposal process. The contract will be awarded based on a review and analysis of the proposals that determines which proposal or proposals best meet the needs of the District. Following the review and analysis of all responsive proposals, the District will make a recommendation to their Board of Education at its regularly scheduled meeting.

All questions regarding this RFP must be submitted by 3:00 p.m. on September 15, 2023. Send all questions to Tony Lopez, Purchasing Manager at tonylopez@stocktonusd.net reference RFP number "24.005" in subject line of email. No questions will be answered after the above listed date and time. Telephone and fax questions will not be answered. Responses to all questions will be posted at <https://www.stocktonusd.net/Domain/155>.

Advertising Dates 9/1/23 and 9/8/23

II. SUBMISSION GUIDELINES

Respondents to this Request for Proposal (“RFP”) shall mail or deliver seven (7) bound single-sided copies, one (1) flash drive of their Proposal, and one (1) separate sealed envelope containing the cost proposal. All materials shall be labeled, “**Request for Proposals #24.005 – Stockton Unified School District- Facilities Master Plan,**” as further described herein, to:

Mr. Tony Lopez, Purchasing Manager
Stockton Unified School District Purchasing Department
2141 Robindale Ave. Stockton, CA 95205

Office Hours: 7:00pm - 4:00pm

Use the intercom at the front gate to alert staff of your arrival.

All responses must be received by 3:00 PM, Friday, October 6, 2023

FAX OR EMAIL RESPONSES WILL NOT BE ACCEPTED.

It is the Proposer’s sole responsibility to ensure that their proposal is received prior to the scheduled closing time for receipt of proposals. No proposals will be accepted after the deadline of 3:00 PM on October 6, 2023. The District assumes no responsibility for non-receipt of submittal packages due to any delay including, but not limited to, carrier delay. It is the Proposer's responsibility to meet the deadline stated above. Proposals that do not contain the required number of copies and all of the information requested in this RFQ may be considered non-responsive and rejected without evaluation. Submittals received after the deadline or at the wrong location may be considered non-responsive. All submittals become public records of the District and will not be returned.

Questions regarding this RFP may be directed to Tony Lopez, Purchasing Manager, via email TonyLopez@stocktonusd.net.

This RFP does not commit the District to award a contract or pay any costs incurred in the preparation of a proposal responsive to this request. The District reserves the right to accept all or part of any proposal or to cancel in part or in its entirety this RFP. The District further reserves the right to accept the proposal that it considers to be in the best interest of the District.

All requirements must be addressed in your proposal. Non-responsive proposals will not be considered. All proposals, whether selected or rejected, shall become the property of the District. Firms are responsible for checking the Purchasing and Warehouse website page at <https://www.stocktonusd.net/Domain/155> periodically for any updates or revisions to the RFP.

RESTRICTIONS ON LOBBYING AND CONTACTS

From the period beginning on the date of the issuance of this RFP and ending on the date of the award of the contract, no person, or entity responding to this RFP, 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 RFP, the evaluation or

selection process/or the award of the contract(s) with any member of the District’s Governing Board (“Board”), selection committee members, or any member of the Citizens' Oversight Committee, or with any employee of the District except for clarifications and questions as described herein. Any such contact shall be grounds for the disqualification of the entity submitting a Proposal.

III. SCOPE OF SERVICES

The selected firm will be expected to provide the following tasks and deliverables as part of the detailed scope of services under this RFP process:

- 1) An Executive Summary
- 2) An Introduction to the District, inclusive of the District Background
- 3) A summary of all Facilities, Site and Building Areas, and School Capacity inclusive of site plans.
- 4) Assess and report on any potential additional Classroom and Facilities needs at the existing sites and include basic conceptual graphics overview.
- 5) Complete a Conditions Needs Assessment, addressing the following:
 - a. Evaluate Existing School District Facilities: This task involves completing a physical evaluation of all the District’s existing sites and their condition to understand the basis for modernization, new construction, and replacement based upon the educational curriculum and maintenance needs of each school and/or support facility. Assessments shall include; building roofing and envelopes, life safety systems, Mechanical, Plumbing, and Electrical upgrades, ADA compliance, pavement, fields, and other utility and infrastructure systems.
 - b. Develop Future Facilities Needs and Alternatives: This task involves assisting with prioritizing short-term and long- term needs of the school district, preparing individual site Facilities Master Plans, incorporating maintenance needs into each campus, facilitating and documenting stakeholder input and assembling all material for presentation to the District leadership and stakeholders.
 - c. Assess how to coordinate facilities planning and construction planning with maintenance protocols and procedures, repair needs, including a prioritization of repairs related to health and safety, and infrastructure improvements.
- 6) Review and summarize all available demographic reports, Local Building Development records, School Capacity and include summaries of these points of information in the Facilities Master Plan.
- 7) Assess and report on energy, solar, and indoor environmental quality improvements.
- 8) Summarize detailed cost estimates.

- 9) Review all available records and prior reports. The selected firm will not solely rely on prior reports, and will need to independently verify the accuracy of information.
- 10) The final master plan will be formatted in a way that will include graphic site plans of existing and future facilities. The firm shall perform the necessary site surveys at ALL District schools and owned facilities to complete site plans.
- 11) Facilitate and attend all meetings necessary to complete the Facilities Master Plan including board meetings, community meetings, staff/faculty/stakeholder meetings at each school site and District department. The selected firm will coordinate work with District personnel.
- 12) Proposed professional fee and schedule (via separate sealed envelope).

IV. SCHEDULE

DATE	ACTIVITY
September 1, 2023	RFP Issued
September 15, 2023	Deadline to submit email requests for interpretation, correction or modification are due. Submit emails to: Mr. Tony Lopez, Purchasing Manager TonyLopez@stocktonusd.net
September 22, 2023	Deadline for District responses to requests for interpretation, correction or modification
October 6, 2022	Proposals Due by 3:00 p.m.
October 12, 2023	Interviews, if necessary
October 17, 2023	Notification to selected firm, if any, subject to Board approval
October 24, 2023	SUSD Board approved contract (tentative)

V. INSTRUCTIONS FOR ORGANIZING THE PROPOSAL

The proposal shall be between 20-50 pages, excluding picture exhibits, and should be complete and clear to provide an insightful, straightforward, and concise overview of the capabilities of your company.

Proposals may be rejected if not prepared in the format described, or if submitted without all required information and signatures. Additional facts and information may be included if it will help to highlight your firm’s qualifications and experience.

A. Proposal Organization

- a. **Cover Letter** - A maximum one-page, dated Cover Letter must be submitted including the legal name of the respondent, address, telephone, email address, and fax numbers, and the name, title, and signature of the person(s) authorized to submit the qualifications on behalf of the firm.
- b. **Table of Contents** - A Table of Contents of the material contained in the qualifications should follow the Cover Letter.

- c. **Executive Summary** - The Executive Summary should contain an outline of your general services and business approach along with a brief summary of your qualifications to engage in a professional relationship with the Stockton Unified School District.
- d. **Comprehensive Narrative** - Provide a Comprehensive Narrative of the planning services including architectural and engineering coordination and services offered by your firm. The narrative shall include the following:
 - i. Experience - Describe your experience with public and private educational projects, preferably with unified school districts. Include the scope of projects, description, dates, and construction costs. Provide information of your firm's existing and planned workload, available resources, and capacity to successfully complete this engagement in an expeditious manner. Describe your experience with the Division of State Architect (DSA), the Office of Public School Construction (OPSC), State Department of Education (CDE), and the office of the State Fire Marshal. Provide an outline of services offered for the completion of school district and campus Master Planning projects. Describe experience with School Facilities Program (SFP).
 - ii. Personnel - Include resumes of personnel who would likely be assigned to this engagement with the Stockton Unified School District. Specifically define the role of each person and outline his or her individual experience. Indicate who would serve as the primary contact for the District. If the firm would utilize resources from more than one office, indicate office locations and how work would be coordinated.
 - iii. Additional Data - Provide additional information about the firm as it may relate to this RFP. Include letters of reference or testimonials, and a list of references including telephone and email contact information. Describe the firm's ongoing commitment to professional education of staff, and provide the total number of permanent employees.
- e. **Certification** - Complete, sign, and date the **CERTIFICATION - REQUEST FOR PROPOSAL**

B. Proposed professional fee and schedule.

- a. Sealed in a separate, envelope clearly marked: "*Proposed Fee and Schedule: Request for Proposals #24.005 – Stockton Unified School District- Facilities Master Plan*" Be sure to include the firm's name and address on the outside of the envelope.

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. The District retains the sole discretion to determine issues of compliance and to determine whether a respondent is responsive, responsible, and qualified.

VI. FIRM/CONSULTANT QUALIFICATIONS

- 1) Demonstrated successful experience providing facilities master planning services for California K-12 school districts.
- 2) Demonstrated successful experience with the Division of State Architect (DSA), the Uniform Building Code (UBC), and Title 24 of the California Code of Regulations is mandatory. Please include information and references that relate to your experience in working with DSA and indicate your understanding of DSA plan check timelines and the conditional or deferred approval process.
- 3) Provide staff with adequate experience and resources to ensure high quality of the facilities master planning services provided.
- 4) Have reasonable proximity to the City of Stockton in order to provide: (1) team working/review sessions; (2) ease of team coordination meetings; (3) minimal cost to attend District meetings; and (4) quick response to issues.
- 5) Work collaboratively with District and District's Authorized Representative(s).
- 6) Be flexible in nature, with positive, can-do attitudes. Be Solution-oriented.
- 7) Be organized, effective and efficient. Exercise professional prioritization skills. Utilizes current web-based software and technology.
- 8) Be proactive. Be prepared, working in advance of deadlines.
- 9) Be mindful about budgets and schedules. Make decisions that support District goals and objectives.
- 10) Communicate potential issues early and often. Provide thoughtful recommendations where applicable.
- 11) Be able to communicate effectively and in a responsible manner to stakeholders.

VII. SELECTION CRITERIA

The selection committee will primarily focus on the substance of the responses. Selection of the most qualified firm to perform this engagement will be based on the submitted packet and fee proposal. Formal interviews are not anticipated to occur but the District reserves its right to conduct interviews if it deems it necessary.

A. EVALUATION

Proposals will be reviewed for responsiveness and evaluated pursuant to the specific criteria set forth in this RFP including, without limitation:

- 1) Experience and performance history of the firm with similar services;
- 2) Experience And Results Of Proposed Team;

- 3) Reputation of individual firms as determined by references from previous clients;
- 4) Claims and Litigation history;
- 5) Location of office and accessibility to the District;
- 6) Overall Responsiveness of the submittal;
- 7) Proposed fee schedule and determination of best value to the District.

A Selection Committee will evaluate all submissions. Each Proposal must be complete. Incomplete Proposals will be considered non-responsive and grounds for disqualification. The District retains the sole discretion to determine issues of compliance and to determine whether respondents are responsive, responsible, and qualified. Based upon the information presented in the Proposals, the District's Selection Committee will recommend the most highly qualified firms to be considered and then potentially selected.

B. DISTRICT INVESTIGATIONS

The District may perform investigations of responding parties that extend beyond contacting the references identified in the Proposal. The District may request a firm 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.

CERTIFICATION - REQUEST FOR PROPOSAL

I certify that I have read the attached **Request for Proposal for Facilities Master Plan and Needs Assessment Study**, and the instructions for submitting an RFP. I further certify that I must submit seven (7) bound singled-sided copies of the proposal and provide a fee proposal in a separate sealed envelope. I am authorized to commit the firm to the proposal submitted.

Signature

Typed or Printed Name

Title

Company

Address

Email Address

Telephone

Fax

Date

If you are submitting as a corporation, please provide your corporate seal here:

All materials submitted in response to this Request for Proposal shall become the property of the Stockton Unified School District.