



## Request for Qualifications

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Serramonte del Rey  
Faculty & Staff Housing Project  
Daly City, California

Jefferson Union High School District

**Solicitation Issued: Wednesday, October 3, 2018**

**Qualifications Due: Friday, November 30, 2018 no later than 2:00 P.M**



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## 1. INTRODUCTION

The Jefferson Union High School District (“JUHSD” or the “District”) as with many school districts and community college districts in the San Francisco Bay Area, faces tremendous challenges in recruiting and retaining faculty and staff because of the high cost of housing in the region.

To address this issue, JUHSD is soliciting General Contractors with design/build project delivery capabilities to support JUHSD’s objective to provide affordable housing to help attract and retain the faculty and staff that are central to the educational mission of JUHSD to best serve the community’s teenagers and young adults.

Specifically, JUHSD intends to utilize some of its land holdings at 699 Serramonte Boulevard in Daly City, California to develop, own and operate workforce housing for its faculty and staff (the “Project”). The need and demand for the Project appear to be strong, as JUHSD employs about 270 teachers and staff. If demand from JUHSD faculty and staff is not sufficient to fully lease the Project, faculty and staff of other school districts or possibly nearby community colleges might be accommodated.

As a result, JUHSD, with the assistance of Brookwood Advisors (“Brookwood”) acting as Owner’s Representative, is seeking Statements of Qualification through the issuance of this Request for Qualifications (“RFQ”) from firms that are interested in providing the final design and construction of the Project on the designated approximate 3.3 acre site for the Project which is located at the northwest corner of its property on the south side of Serramonte Boulevard downhill from and east of St. Francis Boulevard, in Daly City (the “Site”).

This RFQ is the initial step of a two-step selection process. After the selection of up to four (4) Respondents deemed by JUHSD to be most suitably qualified (“Shortlisted Respondents”), JUHSD intends to issue a Request for Proposals (the “RFP”) which is the second step of the selection process. JUHSD will issue the RFP to, and accept responses to the RFP from, only the Shortlisted Respondents.

The Shortlisted Respondent that is finally selected by JUHSD through the RFP process will enter into a contract (the form of which will be an attachment to the RFP) to provide design and construction services as the design/build contractor (“Design/Builder”) for the Project.



Design/Builder also will be responsible to obtain permits and work with JUHSD and its representatives to assure the delivery of all utilities and site services to the Project in a timely manner. Off-site improvements, as may be required by local governmental agencies with jurisdiction over the Project may also be included within Design/Builder's scope of work.

Prior to the issuance of the RFP, JUHSD shall establish the design requirements of the Project which will be presented in the Bridging Documentation (as described further below). A schedule identifying phasing and key milestones and a budget for the Project will also be defined within the RFP.

This RFQ is issued pursuant to Section 17250.25(b) of the California Education Code and seeks to identify Respondents that are qualified and interested in providing these services. Firms that respond to this RFQ, and who are determined by JUHSD to be most qualified, may be deemed eligible and may be invited to offer proposals and/or interview for these services.

The Qualified Respondents that JUHSD, in consultation with Brookwood, determines to be most qualified will be asked to submit a Proposal during the RFP phase of the Project. The RFP will require Respondents to provide information mandated by Section 17250.25(d) of the Education Code, including information related to the cost and schedule for the Project, and more detailed information regarding the Respondent's proposed team.

JUHSD intends to develop the Project as a "design-build" project pursuant to Sections 17025.10, *et seq.*, of the California Education Code. The Design/Builder's services shall include design refinement and construction documentation, construction permitting and construction. Prequalified respondents to the RFP will be provided with Bridging Contract Documents (BCD) prepared by the Owner's design team presenting the Project design in a detailed preliminary design package including outline specifications and performance criteria which shall establish the project design requirements, quality, materials and systems. This documentation shall form the basis of the fixed price contract.

The selected finalist from the RFP process (the "Design/Builder") shall enter into a two-stage Project Delivery Agreement ("PDA") that shall serve as the governing document for the services to be provided for the Project. In Stage One, the Design/Builder will utilize their own architects/engineers by sub-contract or as employees for completing the final construction documents and specifications in compliance with the BCD and all local codes



and ordinances. At completion of the final construction drawings, the Design/Builder shall confirm the contract price is consistent with the proposal. Upon completion of the construction documents the Design/Build team will confirm pricing. The Second Stage Award represents the authorization to proceed with the remainder of the Project Scope through the completion of the Project.

Business terms, including JUHSD’s responsibilities and the Design/Builder’s obligations, will be more precisely identified in the RFP and incorporated into and made a part of the PDA. All Qualified Respondents that submit proposals will be asked to agree to such terms in response to the RFP.

Respondents are subject to instructions communicated in this document and are advised to review the entire RFQ and follow instructions carefully. JUHSD reserves the right to reject any or all statements of qualification, and to waive technicalities and informalities at its sole discretion. All Respondents will be responsible for their own costs associated with responding to the RFQ. Qualified Respondents will be responsible for their own costs associated with preparing the RFP and during contract negotiations.

## **2. GENERAL PROJECT INFORMATION**

### **A. Project Background**

JUHSD’s objectives for the Project are to develop and provide high quality workforce rental housing that serves JUHSD’s faculty and staff thereby offering below-market rents to faculty and staff residing at the Project. Based upon market research and surveys of teachers and staff, JUHSD expects the Project will assist in recruitment and retention of employees.

JUHSD may consider various financing strategies. In June 2018, the District’s voters approved Measure J, which authorizes the issuance of up to \$33 million in general obligation bonds to fund teacher housing for JUHSD. At this time, the District anticipates supplementing this bond financing with certificates of participation (“COP”) financing.

Design/Builder will manage the design development and construction documentation, permitting and construction-related activities on a fixed-cost, turn-key basis. Design/Builder is not expected to provide financing for the Project and will not



participate as an equity partner. All development costs for the Project will be funded by JUHSD via financial instruments to support Project costs.

Design/Builder will facilitate the success of the Project through the relationships it develops (or currently maintains) with approving agencies and governing authorities, and manage the construction from start-up through completion of the Punch List, and initial lease-up.

Design/Builder will be required to address “start-up” concerns related to construction through the duration of the one-year Warranty Period.

JUHSD anticipates instituting an Owner Controlled Insurance Program (“OCIP”) for the Project and, if so, Design/Builder and its subcontractors will be required to participate in the OCIP. If Owner elects not to proceed with an OCIP, a Contractor Controlled Insurance Program (“CCIP”) may be required. The insurance requirements for the Design/Builder will be fully defined in the RFP.

JUHSD presently anticipates that the Project, upon completion, will be owned and managed by a non-profit special purpose entity created by JUHSD (“Non-Profit Entity”). A third-party property management entity hired by the Non-Profit Entity is expected to maintain, administer, operate and lease the Project on behalf of JUHSD.

JUHSD shall maintain ownership of the land and all improvements. In addition to the Bridging Documentation, JUHSD shall provide a title search, topographical and boundary survey, a Phase 1 Environmental Report, geotechnical and utility information and a Project timeline as a part of the RFP.

JUHSD has retained legal counsel to advise it with respect to its interests in the Project. JUHSD may provide additional consultants and inspectors prior to or during construction, at its discretion, and all proposers are expected to secure counsel as they deem appropriate with respect to the Project.

## **B. Owner Point of Contact**

The Owner designates the following person as its representative and Point of Contact for this RFQ. Respondents shall restrict all contact and direct all questions regarding this RFQ, including responses, questions regarding terms and conditions and technical specifications, to the Point of Contact person in writing by email. Respondents shall confirm receipt with



a follow up call should they not receive timely notice that their question(s) has been received.

Name: Ms. Leah Segawa  
Title: Project Director  
Brookwood Advisors  
email: [lsegawa@brookwoodgroup.com](mailto:lsegawa@brookwoodgroup.com)  
Phone: (415) 254-4686

With copies to:

Name: Mr. Ken Klebanoff  
Title: Sr. Vice President, Design and Construction,  
Brookwood Advisors  
e-mail: [kklebanoff@gmail.com](mailto:kklebanoff@gmail.com)  
Phone: (415) 720-9236

Name: Ms. Tina Van Raaphorst  
Title: Associate Superintendent, Business Services  
Jefferson Union High School District  
e-mail: [tvnr@juhsd.net](mailto:tvnr@juhsd.net)  
Phone: (650) 550-7954

### **C. Project Scope / JUHSD Need**

The Project has an overall estimated design and construction cost of approximately \$50 Million to \$60 Million in current dollars.

The Project is to provide 116 units with the following breakdown:  
Fifty-Nine, (59) 1-Bedroom units; Forty-One (41) 2-Bedroom units; and  
Sixteen (16) 3-Bedroom units.

The buildings will be Type 5, three and four-story structures with 200 parking spaces in a combination of structured parking as well as surface parking.



### 3. Service Requirements

On behalf of JUHSD, Design/Builder will manage the Project design development and documentation in conformance with the Bridging Documents to be provided with the RFP. Further, Design/Builder shall manage final design, permitting and construction activities.

All services shall be provided on an open book and fully transparent basis. In this role, Design/Builder assumes comprehensive responsibility for the final design and construction of the Project and, in so doing, will:

- A. Serve as the project manager on a day-to-day basis for the entire scope related to the Project as described in this document.
- B. Manage the design and construction budgets, such that the Project cost does not exceed the agreed upon price and the schedule such that the Project is completed within the agreed timelines.
- C. Retain directly the subcontractors, suppliers, engineers, architects, and other consultants and vendors necessary for the successful completion of the Project.
- D. As appropriate, consult and coordinate consultants, which may include, but are not limited to, the following: Project Advisor/Owner's representative, legal, geotechnical, site environmental, transportation, CEQA, security and data/telecom.
- E. Provide the following service providers, if and as needed for the successful completion of the Project: architectural, acoustical, structural, vertical transportation, HVAC, electrical, plumbing, fire protection and life safety, civil engineering, landscape, cost estimating, signage and graphics, lighting, security, parking equipment and waterproofing. This list is not meant to be complete or exhaustive. Additional service providers may be necessary over the course of the Project and shall be retained by Design/Builder at Design/Builder's expense. JUHSD shall retain the right to reasonably approve the use and hiring of any and all services and entities to be utilized on the Project.
- F. Coordinate with all agencies and entities having construction approval authority or are providers of municipal, utility and other property related services for the Project, including, by way of example, Daly City Fire, Police, Planning, Building and Public Works Departments, the Water District, PG&E, etc.



- G. Convene and lead project meetings, as appropriate to the project schedule and phase of the Project, with the appropriate Project consultants. These meetings may be attended by JUHSD and/or the Owner's Representative.
- H. During the Construction Documentation phase, schedule regular Project meetings on a bi-weekly basis (if not more frequently) which will include the Owner's Representative, the Architect and other consultants as needed. During the Construction phase, schedule weekly team meetings with the Owner's Representative, Architect and other consultants as appropriate to the phase of construction. Project Meetings will be documented with JUHSD's representative(s) included on the distribution.
- I. Obtain all permits needed for the construction of the Project.
- J. Provide documentation as requested by JUHSD for financial institutions and governmental agencies.
- K. Manage the design and construction of the Project. This includes preparing the applications for payment from the Design/Builder, its consultants, the subcontracting entities, and other project vendors and suppliers. Should a Change Order to JUHSD be warranted, Design/Builder will prepare and present the change order request to JUHSD for approval, and once approved, implement the change to the Project.
- L. Identify and manage the completion of Punch List Items.
- M. Obtain the City's Final Certificate of Occupancy for the Project.
- N. Provide all closeout documents including full record documents prepared and turned over to JUHSD at the completion of the project for use by JUHSD.



#### 4. RFQ TIMELINE

- Issuance of RFQ: *Wednesday, October 3rd, 2018*
- Deadline for Written Respondent Questions on RFQ: *Friday, October 26th, 2018*
- Responses to RFQ Questions: *Friday, November 9th, 2018*
- RFQ Submittal Deadline: *2 P.M. on Friday, November 30th, 2018*
- Invite Selected Respondents to Interview: *Friday, December 7th, 2018*
- Selected Respondent Interviews: *Tuesday, December 11<sup>th</sup>, 2018*
- Shortlist Announced: *Thursday, December 14th, 2018*
- Issue RFP (Including Bridging Documents): *January 2019*
- Selection of Design/Builder and Authorization to Proceed: *March/April 2019*
- Projected Construction Start: *July/August 2019*



## **5. REQUIRED SUBMITTAL INFORMATION AND EVALUATION CRITERIA**

In the RFQ phase of the selection process, emphasis is on Respondent's directly relevant qualifications and experience with the design and construction of workforce housing projects of similar scope and complexity, as well as the Respondent's financial history and current financial stability, ability to undertake the proposed Project, experience with public sector projects, experience working as a Design/Builder, Type 5 multi-family residential experience.

### **Each response to the RFQ should include the following components:**

#### **A. Cover Letter and Acceptance of RFQ Terms**

In the cover letter, please include description of Design/Builder. Include Design/Builder's name, street address, telephone number, and e-mail address. Identify the "team representative" (i.e., the person who is authorized to represent and negotiate on behalf of the Design/Build team and make legally binding commitments). Cover letter shall confirm the Respondent's ability and willingness to accept the process and project approach as outlined throughout this solicitation.

#### **B. Team Description, Qualifications and Submittal Requirements**

Summarize the qualifications and experience of the Design/Builder relevant to the proposed development. The summary should provide evidence that the team's key personnel have completed, or have demonstrated the experience, competency, capability, and capacity to complete projects of a similar size, scope or complexity as the Project and that they have appropriate experience and expertise to carry out the Project. See Cal Educ. Code § 17250.25(b)(3)(B).

##### **1. Organization Chart of proposed Design/Build Team and Roles in the Project.**

If the design/build entity is a privately held corporation, limited liability company, partnership, or joint venture, provide a listing of the top four shareholders, partners, or members (in terms of ownership percentages) as well as all shareholders, partner or members known at the time of statement of qualification submission who will perform work on the project. If the Design/Build Team is to be established to perform the services required under the RFP, provide a copy of the organizational documents or agreement committing to form the organization.



2. Resumes of Design/Build Team members (both entities and individuals) slated for the Project that demonstrate that the Team’s key personnel have sufficient experience and training to competently manage and complete the design and construction of the Project. See Cal Educ. Code § 17250.25(b)(3)(B).
3. Demonstrated ability to work with public sector clients.
4. Listing of all relevant licenses, registrations, and credentials that the team members possess and a description of how such authorizations are adequate to carry out the Project. The Design/Build Team must also submit information regarding the revocation or suspension of any license, credential, or registration. See Cal Educ. Code § 17250.25(b)(3)(C).
5. Description and evidence of Respondent’s ability to secure necessary payment and performance bonds and liability and errors and omissions insurance. See Cal. Educ. Code § 17250.25(b)(3)(D).
6. Information concerning workers’ compensation history and worker safety program and evidence of an acceptable safety record for the Respondent. (An “acceptable safety record” means that the Respondent’s experience modification rate for the most recent three-year period is an average of 1.00 or less and its average total recordable injury or illness rate and average lost work rate for the most recent three-year period does not exceed the applicable statistical standards for its business category. See Education Code Section 17250.25(3) (E) and (G).
7. The information requested in this Section B shall be provided under penalty of perjury by the design build entity and its general partners or joint venture members, as required under Section 17250.25(b)(4)(A) of the California Education Code.

*Note:*

*a) Information required under this subdivision that is not otherwise a public record under the California Public Records Act (Chapter 3.5 (commencing with [Section 6250](#)) of Division 7 of Title 1 of the Government Code ) shall not be open to public inspection.*

*b) JUHSD cannot qualify an entity unless it provides an enforceable commitment to the JUHSD that the entity and its subcontractors at each tier will use a “skilled*



*and trained workforce to perform all work on the project that falls within an apprenticeable occupation in the building and construction trades, in accordance with section 2600, et seq., of the Public Contract Code. This is a requirement imposed under section 17250.25(c) of the Education Code.*

### **C. Bonding Capacity**

Provide a letter from your surety company with the following information:

1. The insurer should state that the candidate firm has sufficient bonding capacity for the project and specify remaining capacity.
2. The insurer should provide details of the candidate firm's bonding history in terms of creditworthiness and claims.
3. The design/build entity shall provide payment and performance bonds for the Project in the form and in the amount required by the District, no less than the full amount of the Design/Build Contract and issued by a California admitted surety. The amount of the payment bond shall not be less than the amount of the performance bond.
4. The design/build contract shall require errors and omissions insurance coverage for the design elements of the project. Project insurance requirements will be addressed in the RFP.

### **D. Relevant Experience**

Provide a description of not less than two, nor more than five, recently completed, cost effective multi-family housing projects, preferably with structured parking. Projects should be of a similar nature designed and/or constructed by individuals anticipated to participate on the Design/Builder team. Such descriptions should provide evidence that the team members have the experience, competency, capability and capacity to complete projects of a similar size, scope, and complexity as the JUHSD Project.

For each project, please include the following:

1. Project name, location, completion date, and Design/Builder team members involved in the Project.



2. Description of each project and a detailed explanation as to the relevance of the project to this Project, including, as appropriate, number of units, parking accommodations, project construction type, project cost including change orders with an explanation as to the nature of the change orders, project schedule, etc.
3. Project photos including an aerial photo of the site, site plan and unit interiors
4. Indication of whether the project involved a business relationship with a public entity, and a description of the nature of any such relationship.
5. Written relevant project references for each project discussed.

#### **E. Financial Stability**

1. Design/Builders submitting their qualifications must demonstrate evidence of their financial capacity and stability to carry out this Project by submitting financial statements sufficient to show that the Design/Build Team has capacity to complete the Project. See Cal. Educ. Code § 17250.25(b) (3) (B).
2. Respondents should provide at least two references from a financial institution familiar with the respondent's financial condition. Financial statements for the most recent three calendar or fiscal years are also acceptable as evidence of financial stability.

*Note: During the RFP phase, Qualified Respondents will be required to provide audited/certified financial statements for the most recent five calendar or fiscal years.*

3. The JUHSD recognizes the sensitive nature of the financial information requested; therefore, this information may be submitted under separate cover and labeled "Confidential". All such submittals are considered confidential until the JUHSD makes a selection, at which time the responses shall become public information and available to the public for review. However, if a Respondent asserts this information is a trade secret, financial statement portions of each proposal will be treated as confidential and will not be available for public review at any time. In addition, confidential records may be returned to those not selected, if so requested.



4. List and explain all litigation or disputes to which the respondent is a party that could result in a financial settlement having a materially adverse effect on the ability of the respondent to fulfill its obligations during the term of the Project.
5. Provide a statement detailing whether the Respondent, or any of the Principals of the Shortlisted Respondent have ever filed for bankruptcy or have had projects that have been foreclosed. If yes, please list the dates and circumstances

## 6. QUESTIONS AND CORRESPONDENCE

All questions regarding the RFQ, the project site, and/or the process of selection are to be addressed in electronic format no later than **Friday, October 26, 2018** to:

Ms. Leah Segawa

Brookwood Advisors

[lsegawa@brookwoodgroup.com](mailto:lsegawa@brookwoodgroup.com)

Mr. Ken Klebanoff

Brookwood Advisors

[kklebanoff@brookwoodgroup.com](mailto:kklebanoff@brookwoodgroup.com)

with an electronic copy to:

Ms. Tina Van Raaphorst

Jefferson Union High School District

[tvnr@juhsd.net](mailto:tvnr@juhsd.net)

## 7. DEADLINE AND DELIVERY FOR STATEMENTS OF QUALIFICATIONS

Submittals are due by **2:00 P.M. on Friday, November 30, 2018**, at the Jefferson Union High School District Office, 699 Serramonte Boulevard, Suite 100, Daly City, CA 94044. Submit six (6) 8.5” x 11” hard copies in a sealed envelope labeled “Jefferson Union High School District Faculty & Staff Housing Project RFQ Submittal”. Also, include an electronic copy of this Submittal via thumb drive (in PDF format) in the same envelope.



## 8. SELECTION CRITERIA

Respondent's qualifications will be evaluated based on the presentation of the specific components identified in **Section 5 - Required Submittal Information** and the following significant factors:

- A. Acceptance of RFQ Terms:** Cover letter accepting terms and stating willingness to utilize process and project approach.
- B. Design/Build Team Background:** Strength of qualifications and experience of key team members to be assigned to the project and demonstrated ability of the team to work collaboratively to successfully design and construct projects of similar type, size and scope within budget and on schedule. Listing of Licenses, registrations and credentials and evidence of respondent's ability to secure payment performance bonds and liability and errors and omissions insurance.
- C. Bonding Capacity:** As evidenced by required submittals.
- D. Relevant experience, technical knowledge, construction expertise and comparable design and construction experience:**

### **Description and Qualifications of Design/Build Team's Ability to:**

1. Work collaboratively with a public institution
2. Manage the design/build delivery of comparable projects
3. Manage project budgets and delivery schedules

### **Description and Qualifications of Design/Build Team's Experience with:**

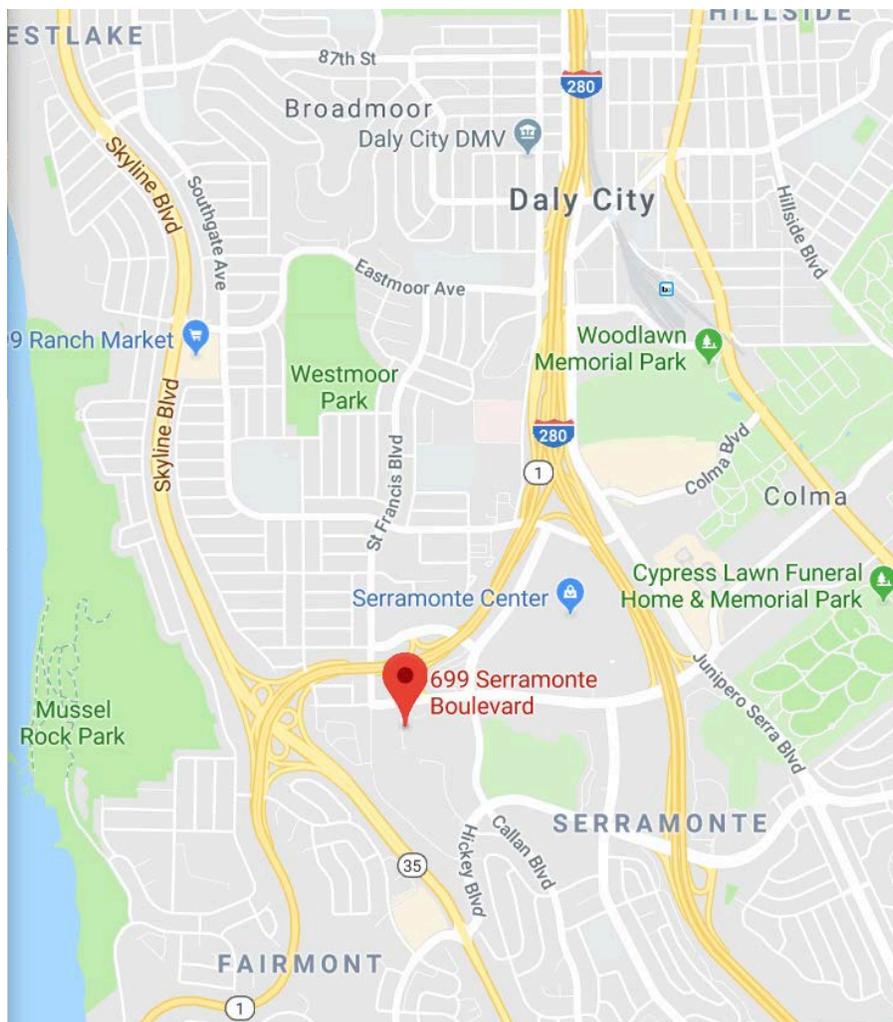
1. Type 5 Multi-family Housing
2. Parking Structures
3. Business relationship with a public agency
4. Bay Area and California projects

- E. Adequate Firm Capitalization:** As evidenced by required submittals.
- F. References:** Letters of Reference for design and construction company or companies and for individuals to be assigned.



## ATTACHMENT A

### Location Map





## ATTACHMENT B

### Project Site





## **ATTACHMENT C**

### **Initial Concept Plans**