

# LEGISLATIVE FILE

File ID No. 08-2141  
Introduction Date 09/24/08  
Enactment No. \_\_\_\_\_  
Enactment Date \_\_\_\_\_  
By \_\_\_\_\_

OAKLAND UNIFIED SCHOOL DISTRICT  
Office of the Board of Education

September 24, 2008

To: Board of Education

From: Roberta Mayor, Ed.D, Interim Superintendent  
Timothy E. White, Assistant Superintendent of Facilities Planning &  
Management, Buildings & Grounds and Custodial Services

Subject: Approval of Draft Request for Proposals for Facilities / Real Property Asset  
Management Consulting Services

---

## **ACTION REQUESTED**

Approval of Draft Request for Proposals ("RFP") for Facilities / Real Property Asset Management Consulting Services.

## **BACKGROUND/DISCUSSION**

The Board of Education has desires to have included in the Multi-Year Fiscal Recovery Plan an analysis of how the District can utilize its real property resources to best educate the OUSD student body and generate new revenues and resources for District operations. In response, District staff has prepared a Draft Request for Proposals for Facilities / Real Property Asset Management Consulting Services. The intent if the RFP is to solicit proposals from qualified consultants that addresses the respondent's ability to provide the following Real Property / Asset Management Services to the District:

- Compilation of a comprehensive inventory including estimated market value of all District owned real property / identification of each site's current uses, including those properties used for adult education, early childhood, special education and administrative purposes.
- Development of a practical "Space Utilization" formula for each site, taking into consideration the effect of pre-school/child development programs, family/community resource centers, health clinics, flexible space, etc.

- Coordination with District staff using enrollment projections to determine unused and underutilized facilities; assist the District with developing a plan for facilities use and disposition.
- Analyze and evaluate findings and make recommendations to the District regarding the “highest and best” use scenarios that achieve the following objectives:
  - Insure the programmatic and financial success of individual schools;
  - Resolve short and long-term enrollment growth impacts;
  - Provide safe and adequate facilities for central administration;
  - Provide new and on-going revenues for the District in ways that are consistent with the operational expectations of the Board of Education (i.e. teacher housing; mid-term leases with ACOE, charter schools, Alameda County, City of Oakland; etc.).
  - Realistic “Market Value” assessment of all OUSD real property.

### **FISCAL IMPACT**

Facilities Funds will pay for the Asset Management Consultant’s services. The estimated budget for these services is \$125,000 and is based upon the project requiring 1000 hours to complete.

### **RECOMMENDATION**

That the Board of Education approve the solicitation of the Request for Proposals Facilities / Real Property Asset Management Consulting Services.

### **ATTACHMENTS**

Draft Request For Proposals for Facilities / Real Property Asset Management Consulting Services.

**Oakland Unified School District  
Facilities Planning & Management  
955 High Street  
Oakland, CA 94601  
(510) 879-2641**

**REQUEST FOR PROPOSALS  
FACILITIES / REAL PROPERTY ASSET MANAGEMENT  
CONSULTANT SERVICES**

**September 25, 2008**

Oakland Unified School District (“District”) invites proposals from qualified firms, partnerships, corporations, associations, or professional organizations with expertise in public sector, facilities asset infrastructure management to undertake, perform, and complete the tasks set forth in this Request for Proposals (“RFP”). The selected consultant(s) (“Consultant”) will provide facilities asset management consultant services to the District, which services shall include, but not be limited to:

- Compilation of a comprehensive inventory including estimated market value of all District owned real property / identification of each site’s current uses, including those properties used for adult education, early childhood, special education and administrative purposes.
- Development of a practical “Space Utilization” formula for each site, taking into consideration the effect of pre-school/child development programs, family/community resource centers, health clinics, flexible space, etc.
- Coordinate with District staff using enrollment projections to determine unused and underutilized facilities; assist the District with developing a plan for facilities use and disposition.
- Analyze and evaluate findings and make recommendations to the District regarding the “highest and best” use scenarios that achieve the following objectives:
  - Insure the programmatic and financial success of individual schools;
  - Resolve short and long-term enrollment growth impacts;
  - Provide safe and adequate facilities for central administration;
  - Provide new and on-going revenues for the District in ways that are consistent with the operational expectations of the Board of Education

- (i.e. teacher housing; mid-term leases with ACOE, charter schools, Alameda County, City of Oakland; etc.).
- o Realistic "Market Value" assessment of OUSD real property.

The Consultant will be required to provide all necessary labor, equipment, tools, and facilities to complete the work described in this RFP. The Consultant will be requested to enter into an independent contractor agreement with the District as set forth in Exhibit A to this RFP ("Agreement"). Please note that any comments or objections to the form of the Agreement shall be provided in writing before the interview described in Section 4.3 below, and may be the subject of inquiry at the interview.

Interested firms are invited to submit their proposals as described below, with one (1) original and five (5) copies of requested materials to:

**Mr. Timothy White,**  
**Assistant Superintendent for Facilities, Planning & Management**  
**Oakland Unified School District**  
**955 High Street**  
**Oakland, CA 94601**

**Attention: Robin Moore, Executive Assistant**

Questions regarding this RFP may be directed to Ms. Moore at (510) 879-8302. Please note the submittal schedule below. **All responses must be received by 2:00 p.m., September \_\_, 2008.**

This is neither a formal request for bids, nor an offer by the District to contract with any party responding to this RFP. The District reserves the right to reject any and all proposals.

#### **INSTRUCTIONS FOR SUBMITTING PROPOSALS**

##### 1. GENERAL

The District intends to select one or more Consultants that best meet the District's needs to perform the facilities asset management consultant services as described in this RFP. The District may assign all or parts of the work described below to one or more Consultant(s). The criteria on which the District makes its determination will not be limited to the amount of proposed fees, but will also be based on ability and experience as described herein. Each firm submitting a proposal must submit an overall cost for performing the services, as described below.

FACILITIES / REAL PROPERTY ASSET MANAGEMENT CONSULTANT RFP

## 2. SCOPE OF WORK

The Consultant(s) selected as a result of this process shall be responsible for the preliminary scope of work as described in Exhibit B (“Services”).

## 3. REQUIRED INFORMATION IN PROPOSAL

All materials submitted to the District in response to this RFP shall remain property of the District.

### 3.1 FIRM INFORMATION

Provide a summary of the firm’s overall capabilities, history, recent and related experience, and expertise. The proposed relationships among all key personnel and support staff that are expected to provide the Services should also be identified. Provide information on the Consultant’s most relevant and applicable experience. Provide information on the Consultant’s current work load, facilities, resources, and experience that clearly demonstrate the ability to complete the required Services successfully within the time constraints stated. Describe number of years in business and types of business conducted. Identify proportion of overall business that consists of facilities asset management consulting, and proportion of overall business that consists of public school district projects.

### 3.2 REFERENCE PROJECTS

With regard to the services described in Exhibit B, provide a list of similar projects that key personnel have completed for public agencies. Provide information on the Consultant’s experience related to providing facilities asset management projects. Firms that have no performance history with the District and/or other public agencies are encouraged to submit a proposal. Firms that have previously provided services for the District must include those services in the list of reference projects. The reference list should include:

- Client name, contact person, and current telephone number (Note: If the contact person or telephone numbers are incorrect, then the Consultant will receive zero points for that reference);
- Project description and location;
- Description of services provided;
- Budget performance;
- Schedule performance;

- Key personnel involved; and,
- Sub consultants employed.

If applicable, list all litigation arising from any public school district project on which your firm(s) provided facilities asset management consulting services in the past 5 years. State the issues in litigation, the status of litigation, names of parties, and outcome.

### 3.3 PRIMARY REFERENCE PROJECTS

Describe at least one primary reference project in more technical detail than those listed as similar reference projects for public agencies. In general, the primary reference project(s) should demonstrate experience in facilities asset management infrastructure projects for public agencies and specifically, in performing the Services described in this RFP. Select a primary reference project that resembles, as closely as possible, the work effort required. Specify the date the primary reference project was completed.

Describe the approach and methodology of providing the required services for the primary reference project, including any special equipment or software used. Indicate the level of services performed and work products provided, relative to the total work effort required for the entire primary reference project. Identify any supplemental tasks, deemed necessary or recommended, which enhanced the work, reduced cost, or expedited delivery.

Indicate the location of the prime consultant's office during the primary reference project. If the work was shared by other firms or different offices, identify the locations and the work performed by each firm or office.

Identify the project manager's specific responsibilities. List all sub consultants that provided services to the Consultant for the completion of the project and describe the role they performed. Identify who performed quality control/assurance and provide a percentage of time that was devoted by the Consultant in performing this function related to work effort and products. Indicate how much staff time the client and other agencies devoted to the completion of the project.

Include names, addresses, and current telephone numbers of the client and the name of the client's key representative assigned to the work.

### 3.4 PROPOSED PROJECT TEAM

The selected firm shall employ at its expense professionals properly licensed and skilled in the execution of the functions required for the facilities asset management consulting work described by this RFP. Provide brief resumes of the key personnel

anticipated to participate in the required Services and an explanation of the function each key person will perform. Emphasize the experience and abilities relevant to the specific Services described in this RFP. Also provide resumes of the subconsultant's key personnel, if any, and the approximate percentage of time to be assigned. Include a statement committing assigned key personnel to a specific level of participation in providing the services described. Describe for each his or her experience with facilities asset management consulting projects, including identifying those projects for the past 5 years. If applicable, list license numbers and dates.

### 3.5 PROPOSED METHODOLOGY AND CAPABILITIES

Describe the firm's approach to and experience with facilities asset management consulting projects. The proposal shall include a work plan, which delineates the approach to be employed to complete the Services and work tasks described in Exhibit B. The work plan should demonstrate the Consultant's understanding of each task, and should refine and/or expand the Services to reflect the Consultant's approach to completing the work. It should also address the Consultant's capability to complete the required Services within the proposed schedule. The work plan should include the following:

A. Identify the Project Manager and detail the specific responsibilities of the Project Manager. Identify the Person-In-Charge when the Project Manager is not available.

B. List all sub consultants providing services to the Consultant for the completion of the Services and describe their functional roles. Include the names, addresses, and current telephone numbers of the firm and the name of the key representative assigned. Provide a description and an organizational chart of the proposed team structure.

C. Identify who will be performing quality control and provide a breakdown and percentage of time that will be devoted by the Consultant in performing this function related to work effort and products.

D. Describe the approach and methodology that will be used to provide the required Services including any software or equipment.

E. Identify any tasks not shown that the Consultant deems necessary and recommend any alternatives, which may enhance the Services, reduce cost, or expedite delivery.

F. Indicate where the work is to be performed. If the work is to be shared among firms or different offices, identify the locations and the work to be performed in each firm or office.

G. Indicate how much staff time the Consultant assumes District or other agencies will devote to the preparation or completion of the tasks required to complete the Services.

### 3.6 WORK SCHEDULE

Indicate in the proposal whether the completion of the Services can be realistically completed in more or less time than that stated. The Consultant is encouraged to develop additional detail regarding the work schedule, suggest changes within the constraints of the duration and end dates, and suggest changes to expedite delivery of the requested Services. The schedule for requested Services must be provided for approval by the District.

### 3.7 COST AND FEE SUMMARY

Provide a preliminary cost and fee summary for the Services described in this RFP.

## 4. DISTRICT'S EVALUATION PROCESS

### 4.1 SCHEDULE

4.1.1 Submittals: due by 2:00 p.m., September \_\_, 2008.

4.1.2 Finalists notified: September \_\_, 2008.

4.1.3 Finalists to Submit detailed confidential fee proposal: September \_\_, 2008.

4.1.4 Interviews: September \_\_, 2008, 8:30 a.m. - 5:30 p.m.

4.1.5 Final determination/award: September \_\_, 2008.

### 4.2 SELECTION OF FINALISTS

The District will review the technical proposals for completeness, clarity, and content. Each proposal will be reviewed to determine if it meets the requirements contained in this RFP. Failure to meet the requirements will be cause for rejection of the



proposal. The District may reject any proposal if it is conditional, incomplete or contains irregularities. The District may waive an immaterial deviation in a proposal. A waiver of an immaterial deviation shall not modify the RFP documents, and it shall not exempt the Consultant from any terms of an executed Agreement, should one be awarded. The criteria for selecting finalists may include, without limitation:

Experience and performance history of the firm with similar programs;  
Experience and results of proposed personnel;  
References from clients contacted by the District;  
Technical capabilities and track record of their use, and  
Overall responsiveness of the proposal.

- Up to 50 points will be allotted for demonstration of organizational/staff professional background and experience, and access to resources to fulfill the stated scope of services.
- Up to 30 points will be allotted based upon cost and cost realism.
- Up to 10 points will be allotted based upon overall responsiveness of the proposal.
- 10 points will be afforded to respondents whose principal place of business is located within the Oakland area.<sup>a</sup>

Aside from the evaluation process described herein, consultants or their representatives are strictly prohibited from attempting to influence the outcome of the selection by contacting District staff, or other individuals and entities involved in the process of selecting the consultant or awarding the Agreement. Any such attempt to influence selection outside of the proscribed process will be grounds for disqualification.

#### 4.3 INTERVIEWS AND FEE PROPOSALS

Interview: An interview will be conducted with the two or three highest ranked consultants. Rankings will be made by the District following evaluation and scoring of the proposals. The District may choose to increase or decrease the number of firms

---

<sup>a</sup> As part of the District's commitment to working with community stakeholders using fair and open decision making processes, OUSD is in the final stages of developing a District-wide Local Business Participation Program. A 10 point preference will be afforded to respondents whose principal place of business is located in the Oakland area.

interviewed. Those firms invited to interviews will be notified of the dates and times of their interviews. The key proposed project staff will be expected to attend the interview. The interview will start with an opportunity for the firm to present its proposal and its project team. The interview will be an opportunity for the District selection committee to review the proposal, the firm's history, and other matters the committee deems relevant to selecting the firm. The committee may inquire as to the firm's suggested approaches to the projects and the issues identified in this RFP.

Any comments or objections to that form of Agreement provided as Exhibit A to this RFP shall be provided in writing before the interview, and may be the subject of inquiry at the interview. Please note that the Agreement reflects the District's standard business practices and is not subject to substantive change.

Fee Proposals: The finalists will be required to submit in advance of the interview a detailed fee proposal in a separate and sealed envelope. This fee proposal shall include all charges and costs proposed to be charged to the District, including rates for extra work. The fee proposals shall remain confidential except to the extent that a successful firm's proposal may be incorporated into an Agreement with the District.

The fee proposal will consist of a not-to-exceed, lump sum price to complete the Services. This fee quote must be itemized in one of two ways:

1. The fee proposal will show a price for each task described in the Services.
- or
2. The fee proposal will show a price for components of the work, as defined by the CONSULTANT, that show how the price is derived and how the work will be completed.

District policy and standard business practice allows for reimbursement of approved travel expenses at the current IRS approved mileage rate only. Per diem, lodging, or meal expenses are not allowed.

The District may perform investigations of proposing firms that extends beyond contacting the districts identified in the proposals. Following the interviews, the selection committee will make recommendations to District staff and the Board regarding the candidates and awarding the contract. The criteria for these recommendations will include those identified above, as well as cost considerations based on the fee proposals.

#### 4.4 FINAL DETERMINATION AND AWARD

The District reserves the right to contract with any entity responding to this RFP for all or portions of the Services, to reject any proposal as non-responsive, and not to

contract with any firm for the Services described herein. The District makes no representation that participation in the RFP process will lead to an award of contract or any consideration whatsoever. The District reserves the right to seek proposals from or to contract with any firm not participating in this process. The District shall in no event be responsible for the cost of preparing any proposal in response to this RFP.

The awarding of a contract is at the sole discretion of the District. The District expects to award contract(s) for the Services identified in this RFP at the Board meeting of \_\_\_\_\_, 2008.

The District may, at its option, determine to award contract(s) for only phases of the work or for only portions of the Services identified herein. In such case, the successful proposing firm will be given the option not to agree to enter into the Agreement and the District will retain the right to negotiate with any other proposing firm selected as a finalist. If no finalist is willing to enter into a the Agreement for the reduced scope of work the District will retain the right to enter into negotiations with any other firm responding to this RFP.

**EXHIBIT A**  
**FORM OF INDEPENDENT CONTRACTOR AGREEMENT**

DRAFT

## **EXHIBIT B SERVICES**

General categories of work: (1) providing professional services to the District, including establishing effective facilities asset management services; (2) accurately identifying asset type, location, age, and quantity, as well as reliable projections of disposition proceeds and replacement costs and schedules; (3) developing a comprehensive inventory of District facilities assets, identifying needs and surpluses; (4) providing the basis for an facilities asset disposition and replacement schedule, including budget planning, and identifying maintenance and replacement costs; (5) developing options for facilities asset disposition or re-use and (6) providing general facilities asset management guidance and support services (collectively, "Services"), which may include one or more meetings and or facilitation of the District's property advisory committee and meetings or presentations to the Board of Education.

These Services will be provided by the Consultant in an effort to assist the District in developing a facilities inventory and plan for school facilities closure, use, and disposition. The Consultant will use the facilities inventory data [and Facilities Master Plan] provided by the District ("Inventory"). The completed Inventory shall contain facilities owned by the District.

The projected date for Notice to Proceed is October \_\_, 2008, and the projected date for completion is \_\_\_\_\_ 31, 2008.

This description of Services is provided for guidance only as part of the RFP. A proposal submitted in response to this RFP will include an approach and work plan that demonstrates the Consultant's understanding of this description, and shall contain significant detail to define the tasks and the approaches the Consultant intends to perform to complete the work. The Consultant's work plan will also demonstrate the ability to complete the required work within the term of the contract and shall contain a detailed schedule, showing the task sequence, time required for each task and subtask, and total time estimated to perform the work. The schedule will also indicate target dates, deliverables, milestones, and review periods on the schedule.