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Memo

To Board of Education Facilities Committee

From Timothy White, Deputy Chief Facilities Planning & Management

Board Meeting Date June 14, 2019

Subject RFP- For Consulting Services for G.O Bond Feasibility & Planning Services

Action RFP process is for Consulting Services for G.O. Bond Feasibility & Planning Services

Background The RFP for Consulting Services for G.O Bond Feasibility & Planning Services was issued on May 25, 2019. This RFP is presented to the Facilities Committee to provide an overview of the process we are following the requests services for political strategy, and research regarding a potential 2020 Bond. Proposals will be received June 1, 2019

Discussion The RFP for Consulting Services for G.O. Bond Feasibility & Planning Services is to provide Bond Feasibility Services, Phase Two – Ballot Measure Preparation & Communications Services

Fiscal Impact Funding to support this consultant service will be identified prior to submission for Board Action

Attachment [RFQ-P GO Bond Consulting Services \(2\).pdf](#)

**Oakland Unified School District
Department of Facilities Planning and Management
955 High Street Oakland CA 94601**

**REQUEST FOR QUALIFICATIONS AND PROPOSALS (RFQ/P)
Consulting Services for G.O. Bond Feasibility & Planning Services**

May 24, 2019 (Issued)

The Oakland Unified School District ("District") is requesting proposals from highly qualified and experienced teams or firms to provide consulting services to assist the District in placing a General Obligation Bond Measure on the March or November 2020 ballot.

Interested teams or firms are invited to submit a completed Statement of Qualifications ("SOQ") along with the Proposal (collectively "RFQ/P Packet") as described below, with one (1) unbound original, five (5) bound copies and a PDF version on a flash drive of requested materials to:

Oakland Unified School District
Tadashi Nakadegawa, Acting Executive Director
Department of Facilities Planning and Management
955 High Street, Oakland, CA 94601

All Statements of Qualifications and Proposals must be received on or before May 31, 2019, no later than 4:00 p.m. Oral, telegraphic, facsimile, telephone or email RFQ/P Packets will not be accepted. RFQ/P Packets received after this date and time will not be accepted and returned unopened. The District reserves the right to waive any informalities or irregularities in the RFQ/P Packets. The District also reserves the right to reject any and all RFQ/P Packets and to negotiate contract terms with one or more Respondents.

If you have any questions regarding this RFQ/P please email Tadashi Nakadegawa, Acting Executive Director at tadashi.nakadegawa@ousd.org.

LOCAL, SMALL LOCAL AND SMALL LOCAL RESIDENT BUSINESS ENTERPRISE PROGRAM The Local Business Utilization Policy requires that there is a mandatory fifty percent (50%) LBU participation with a 25% or less Local Business (LBE) participation and a 25% or more Small Local or Small Local Resident Business (SLBE/SLRBE) participation for all capital program/construction-related contracts and professional services agreements. The full version of OUSD's latest Local, Small Local and Small Local Resident Business Enterprise Program can be found by going to the OUSD home page: ousd.org > Offices > Facilities Planning & Management Department > For Contractors and Developers > Bids and Requests for Proposals > Bid Information > 2014 Amendment to Local Business Participation Policy.

Note: This solicitation is exempt from our LBU program. However, you should include information on the extent of LBU participation.

Schedule of Activities

Listed below is the "Schedule of Activities" which outlines pertinent dates of which firms responding to this solicitation should make themselves aware.

DATE	ACTIVITY
May 24, 2019	RFQ/P Issued
May 31, 2019	Proposals Due by 4:00 p.m.
June 26, 2019	Board Meeting – tentative approval of Contract.
June 27, 2019	Tentative Notice to Proceed issued to Consultant.

ESTIMATED CONSTRUCTION BUDGET: N/A

PROJECT DURATION: One-year Agreement.

REQUEST FOR QUALIFICATIONS & PROPOSALS

The purpose of this RFQ/P is solicit fee proposals from qualified professionals to assist in the analysis of the voter opinion surveys, develop an information outreach strategy and position the District to place a General Obligation Bond Measure on the March 2020 ballot.

A. DISTRICT BACKGROUND

Oakland Unified School District (OUSD) is striving towards being a Full Service Community District focused on high academic achievement while serving the whole child, eliminating inequity, and providing each child with excellent teachers, every day. All OUSD students will find joy in their academic experience while graduating with the skills to ensure they are caring, competent, fully-informed, critical thinkers who are prepared for college, career, and community success.

OUSD currently has 86 District-Run schools which houses 36,524 students. In addition, during the 2018-19 School Year, there were 34 District-Authorized charter schools with 13,791 students. OUSD also has 7 Adult Education programs at 20 locations.

B. GENERAL STATEMENT OF WORK:

It is anticipated that the Scope of Services will include, but not limited to, the following:

Phase One – Bond Feasibility Services

- Collaborate with the District and its consultants during the pre-election process.
- Establish a recommended project schedule.
- Review the District's long-range facility Master Plan and assist in identifying viable projects for consideration.
- Assess the District's political environment and assess public communication efforts.
- Coordinate and conduct voter opinion research of likely voters including:
 - Data collection, analysis and interpretation
 - Preparation of a Final Report of research results
- Provide strategic conclusions and recommendations to the District regarding the feasibility of General Obligation Bond
- Assist with ongoing project related strategic counsel.

Phase Two – Ballot Measure Preparation & Communications Services (if measure is feasible)

- Work with the District to select the optimal election date.
- Provide a recommended schedule.
- Provide guidance and support to meet filing deadline requirements.
- Assist the District in qualifying the bond measure for the ballot.
- Recommend a strategy, tools, calendar and budget to guide pre-electoral process.
- Provide support for stakeholder and public communication and messaging leading up to a decision of the Board to call for an election.
- Coordinate a tracking poll.
- Provide recommendation to package the District's measure for electoral success.
- Provide support and collaborate with the District's consultants regarding the bond amount, tax rate and project list.

- Draft and recommend language for the Ballot Statement and Argument.
- Collaborate with the District and its consultants to finalize the bond measure package.
- Prepare the District for an information-only communications environment after the ballot measure is filed and on the ballot (information-only web, content, fact sheets, FAQs, etc.)
- Assist with communications to keep the Board and District leaders informed.
- Provide ongoing project-related strategic counsel as needed.

C. FULL OPPORTUNITY

The District hereby affirmatively ensures that Disadvantaged Business Enterprises ("DBE"), Small Local Business Enterprise ("SLBE"), Small Emerging Local Business Enterprise ("SELBE") and Disabled Veterans Business Enterprise ("DVBE") firms shall be afforded full opportunity to submit qualifications in response to this notice and will not be discriminated against on the basis of race, color, national origin, ancestry, disability, gender, transgender status, political affiliation, or religion in any consideration leading to the award of contract. No qualified disabled person shall, on the basis of disability, be excluded from participating in, be denied the benefits of, or otherwise be subjected to discrimination in any consideration leading to the award.

D. LIMITATIONS

This RFQ/P is not an offer by the District to contract with any party responding to this RFQ/P. The District reserves the right to add additional prequalified Respondents for consideration after distribution of this RFQ/P if it is found to be in the best interest of the District. All decisions concerning the selection will be made in the best interests of the District. The awarding of the contract pursuant to this RFQ/P, if at all, is at the sole discretion of the District.

The District makes no representation that participation in the RFQ/P process will lead to an award of contract or any consideration whatsoever. The District shall in no event be responsible for the cost of preparing any RFQ/P Packet in response to this RFQ/P. RFQ/P Packets and any other supporting materials submitted to the District in response to this RFQ/P will not be returned and will become the property of the District unless portions of the materials are designated as proprietary at the time of submittal, and are specifically requested to be returned. Vague designations and/or blanket statements regarding entire pages or documents are insufficient and will not bind the District to protect the designated matter from disclosure. Pursuant to *Michaelis, Montanari, & Johnson v. Superior Court* (2006) 38 Cal.4th 1065, RFQ/P Packets shall be held confidential by the District and shall not be subject to disclosure under the California Public Records Act until after either: (1) the District and the successful Respondent have completed negotiations and entered into an Agreement, or (2) the District has rejected all Proposals. Furthermore, the District will have no liability to the Respondent or other party as a result of any public disclosure of any RFQ/P Packet.

E. RESTRICTIONS ON LOBBYING AND CONTACTS

From the period beginning on the date of the issuance of this RFQ/P and ending on the date of the award of the contract, no person, or entity submitting in response to this RFQ/P, 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 RFQ/P, the evaluation or selection process/or the award of the contract with any member of the

District, Governing Board, selection members, or any member of the Citizens' Oversight Committee. Any such contact shall be grounds for the disqualification of the Respondent submitting a RFQ/P Packet.

F. STATEMENT OF QUALIFICATIONS

1. General Information / Instructions - Statement of Qualifications

- 1.1.** The District is inviting Statements of Qualifications for the "Project" which shall require coordination, administration, consulting and advice, and related services.
- 1.2.** The District seeks to identify teams with a record of excellence in efficient planning and project delivery. The firms must have extensive experience performing the type of work required in this RFQ/P.
- 1.3.** The Statement of Qualifications must contain all requested information about the firm and must be on no larger than 8 1/2 x 11 paper and no more than fifteen (15) printed pages in length. Statement of Qualifications should be complete and prepared to provide an insightful, straightforward, and concise overview of the capabilities of firm.

2. Content – Statement of Qualifications

- 2.1. Letter of Interest** - A dated Letter of Interest must be submitted, including the legal name of the firm(s), address, telephone and fax numbers, and the name, title, and signature of the person(s) authorized to submit the Statement of Qualifications on behalf of the firm. The Letter of Interest should provide a brief statement of firm's experience indicating the unique background and qualities of the firm, its personnel, and its sub-consultants, and what will make the firm a good fit for work in the District. The letter shall also include the following statements:

"[RESPONDENT'S NAME] received a copy of the District's Agreement attached as **EXHIBIT A** to the RFQ/P. [RESPONDENT'S NAME] has reviewed the indemnity provisions in **EXHIBIT A** and insurance requirements contained in the Agreement. If given the opportunity to contract with the District, [RESPONDENT'S NAME] has no objections to the use of the Agreement."

Respondent shall certify that no official or employee of the District, nor any business entity in which an official of the District has an interest, has been employed or retained to solicit or assist in the procuring of the resulting contract(s), nor that any such person will be employed in the performance of any/all contract(s) without immediate divulgence of this fact to the District.

- 2.2. Table of Contents** - A table of contents of the material contained in the Statement of Qualifications should follow the Letter of Interest.
- 2.3. Executive Summary** - The Executive Summary should contain an outline of firm's approach, along with a brief summary of firm's qualifications.

Narrative - Provide a comprehensive narrative of the services offered by firm. The narrative should include all of the following:

2.4. Firm Information

2.4.1. Provide a brief history of firm, team firms, and, if a joint venture, of each participating firm. Identify legal form, ownership, and senior officials of company(ies). Describe number of years in business and types of business conducted.

2.4.2. Qualifications:

2.4.2.1. Five (5)+ years of experience performing the type of work required in this request. This experience shall include experience with public agencies, preferably California school districts and colleges.

2.4.2.2. Sufficient resources to complete the work.

2.4.2.3. Proven "track record" and success in performing such work.

2.4.2.4. Familiarity of, and compliance with, all local, state and federal laws and regulations.

2.4.2.5. A California office and/or representative.

2.4.2.6. Highly qualified staff with education, experience and knowledge of the disciplines and fields required by this work. This includes excellent interpersonal and communication skills.

2.4.3. Proposal Content:

2.4.3.1. Team Overview – firm description and key contact information for participating firms.

2.4.3.2. Experience – provide relevant experience for each team discipline. Include your client list from the last two elections and the results achieved in each client election.

2.4.3.3. Project Team – resumes/bios of key personnel that will be assigned to the Project.

2.4.3.4. References – at least three (3) relevant references (K-12 school districts).

2.4.3.5. Scope of Services – what the team proposes to do to assist the Oakland Unified School District.

2.4.3.6. Management Plan and Timeline – how the team plans to perform its work plus proposed timeline.

2.4.3.7. Proposed Fees.

2.5. Additional Data - Provide additional information about the firm as it may relate to the Statement of Qualifications. Include letters of reference or testimonials. Indicate ongoing commitment to professional education of staff, total number of permanent employees, and any other data that may assist the District in understanding firm's qualifications and expertise. This additional data shall be in an Appendix and will not be counted in the fifteen page SOQ limit.

2.6. Professional Fees

Firms interested in being considered shall clearly indicate that interest and provide a detailed fee proposal.

Provide a detailed schedule of the Consultant's hourly billing rates and a

breakdown of associated costs for all tasks proposed (including contingency costs per task).

3. Local, Small Local and Small Local Resident Business Enterprise Program

The basic Local Business Utilization Policy requires that there is a mandatory fifty percent (50%) LBU participation with a 25% or less Local Business (LBE) participation and a 25% or more Small Local or Small Local Resident Business (SLBE/SLRBE) participation. Submit a detailed description of the team's L/SL/SLRBE composition clearly indicating the name of the firms and percentages of participation on the following form ("Local Business Participation Worksheet").

LOCAL BUSINESS PARTICIPATION WORKSHEET

Prime Consultant:

RFQ/P: General Bond Obligation Feasibility & Planning Services

Date:

Team Member	Projected Percent of Total Fee Per Team Member	LBE %	SLBB %	SLBR %	City of Oakland Certification Number
Prime Company: Address: Phone: Email:					
Company: Address: Phone: Email:					
Company: Address: Phone: Email:					
Company: Address: Phone: Email:					
Company: Address: Phone: Email:					
Company: Address: Phone: Email:					
TOTAL PARTICIPATION					

Approval – LBU Compliance Officer

G. District's Evaluation / Selection Process – Statement of Qualifications

1. Submittals will be reviewed for responsiveness and evaluated pursuant to established objective criteria, with particular attention to, without limitation, each respondent's qualifications, demonstrated competence in like construction, and the Firm's ability to integrate its personnel with the District's staff and consultants.
2. After the submittals are evaluated and/or ranked, the District, at its sole discretion, may elect to interview the top Firm(s). The District may elect to interview one or more Firms. Interviews are tentatively scheduled as indicated above. Any firm(s) selected for interviews must make available for interview the key personnel it intends to assign to the District's Project(s). Any comments or objections to the form of Agreement attached hereto as **EXHIBIT A** to this RFQ/P shall be provided in writing before the interview and may be the subject of inquiry at the interview. Any comments or objections to the form of Agreement not provided in writing before the interview will not be entertained by the District. Adequate time will be allowed for presentation of qualifications followed by questions and answers. Firms will then be selected and placed in a pre-qualified "pool" for future projects.
3. **District Investigations** - The District may check references, and may perform investigations of firm that extend beyond the information in the proposals. The District may conduct interviews of firms.

H. Final Determination And Award

The District reserves the right to contract with any entity responding to this RFQ/P, to reject any proposal as non-responsive, and not to contract with any firm for the services described herein. The District reserves the right to seek proposals from or to contract with any firm not participating in this process. The District reserves the right to reject any or all submissions, to request further information, to negotiate with any firm, to extend the submission deadline, or to amend or cancel in part or in its entirety this RFQ/P. This RFQ/P does not commit the District to award a contract or to reimburse any firm for costs incurred in submitting a proposal.

The awarding of contract(s) is at the sole discretion of the District. The District may, at its option, determine to award contracts only for portions of the scope of work. 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 contract for the reduced scope of work, the District will retain the right to enter into negotiations with any other Respondent responding to this RFQ/P.

The RFQ/P packet, and any other supporting materials submitted to the District in response to this RFQ/P will not be returned and will become the property of the District unless portions of the materials are designated as proprietary at the time of submittal, and are specifically requested to be returned. This RFQ/P does not commit the District to negotiate an agreement with any proposing firm or individual.

END OF RFQ/P