



FILLMORE UNIFIED SCHOOL DISTRICT

Facilities Development & Planning

707 First Street Fillmore CA 93015

Phone: 805.524.8047 Fax: 805.524.5435

REQUEST FOR QUALIFICATIONS

PROJECT MANAGEMENT SERVICES FOR VARIOUS FACILITIES IMPROVEMENT PROJECTS

1. REQUEST FOR QUALIFICATIONS

Introduction

On May 3, 2016 the Fillmore Unified School District Board adopted a Long-Range Facility Master Plan with the intent to implement various projects over the course of the next 20-30 years, dependent on available resources to the District. On November 8, 2016 voters overwhelmingly approved Measure V, a \$35 million bond to repair and upgrade older classrooms and school facilities, by a 67.2% yes vote. In executing the Long-Range Facility Master Plan and its projects, the District is required to meet State and Local regulatory requirements as well as meet critical deadlines for State funding and school operations. Therefore, time is a critical factor in the planning and implementation of projects. It is expected that any and all Consultants working for the Fillmore Unified School District ("District") have a thorough working knowledge of the District's Long Range Facility Master Plan, its components, documents, objectives, goals, and philosophy to be able to appropriately work collaboratively with the District, its team of consultants and staff towards effective and successful implementation. These documents are available on the District's website at:

<https://www.fillmoreusd.org/apps/news/article/551746>

Purpose

The purpose of this RFQ is to obtain information that will enable the District to select a limited number of project management consulting firms (each, a "Consultant") that can assist the District in providing staff augmentation in project management and owner representation on various District projects. Each Consultant responding to this RFQ should be prepared and equipped to provide services to the District in an expeditious and timely manner and on relatively short notice so as to enable the District to meet critical time deadlines and schedules.

By way of this RFQ, the District intends to pre-qualify Consultants to provide Project Management ("PM") services, for and on behalf of the District. It is the District's intent that the RFQ process will enable the District to expedite the procurement of needed PM services to the District.

Submission

If your firm is interested in performing PM services for various facilities improvement projects on behalf of the District, please submit to the District a Statement of Qualifications ("SOQ") in accordance with this RFQ. **SOQs must be received prior to 2:00 p.m. Tuesday, April 30, 2019.** SOQs will be date stamped to record receipt thereof. The SOQs may be mailed or delivered in person during normal business hours, which are 8:00 a.m. to 4:00 p.m., Monday through Friday. Delivery of SOQs is the sole responsibility of the Consultant. Failure to submit a response by this date and time may be grounds for disqualification. All SOQs must be signed and become the property of the District. The address for submission of the SOQs is:

Fillmore Unified School District
Facilities Development & Planning
Attn: Phil Clark
Director of Maintenance, Operations and Transportation
707 First Street
Fillmore, CA 93015

Each Consultant is required to submit a SOQ it deems appropriate to the following requests. Submittals should be brief, concise and provide sufficient clarity to meet the criteria to be used in the evaluation process. The Consultant(s) being sought through this RFQ will need to meet the District's minimum criteria as listed herein.

Questions

Please contact Phil Clark if you have any questions regarding this RFQ. All questions must be submitted in writing via email to pclark@fillmoreusd.org. Do NOT contact the Purchasing or Business Services with questions regarding this RFQ. **The question deadline for this RFQ is Monday, April 22, 2019 at 12:00 pm.** Respondents must read the entire RFQ prior to submitting questions as most questions will be answered in this RFQ. Please refrain from asking questions regarding the formatting of the SOQ. After this deadline, the District will not answer, address, and/or review any questions firms may submit. The District thanks you for your interest and invites your firm to submit the SOQ in accordance with the terms of this RFQ. Responses to all questions received prior to the deadline will be provided to all respondents.

Request for Qualifications

Consultants are in no way guaranteed to receive any work from the District. However, it is the District's intent to look to the pool of Pre-Qualified Consultants when choosing a Consultant to perform PM services for the District's school facilities program. The District, on an "as-needed" basis, may issue Request for Proposals ("RFP") to one or more Pre-Qualified Consultants to provide PM services on behalf of the District for a particular project. Each Proposal shall set forth a detailed scope of services, a completion schedule, a schedule of professionals and sub-consultants that will be used to supervise and staff the project, and a not-to-exceed dollar amount for the services to be performed. The District will allocate work to said Pre-Qualified Consultants without having to request and evaluate additional information as to the Consultant's qualifications.

2. SCOPE OF SERVICES

Scope of Services

The District is interested in engaging qualified Consultants to provide project management and administrative support, from planning/predesign through occupancy, as an extension to District staff. The District at its sole discretion can decide to contract qualified Consultants for a portion of or all-inclusive scope of services as outlined herein. It is expected that Consultant's staff have the knowledge and experience to provide support in any or all of the project management areas.

To provide efficiency and consistency across projects, the District requires that Consultant's staff be dedicated full-time to this effort, unless otherwise notified by the District. Consultant staff will be reporting to designated District staff as well as members of the Program Management team as identified by the District. Other than specialized technical assistance such as estimating or scheduling, the District does not anticipate any requirement for part-time involvement of Consultant's executive or other home office staff.

The Consultant's PM staff members will act as an extension of District staff to manage the planning/predesign, design, construction, close-out, Division of State Architect certification, and occupancy of projects within the Measure V building program. They will be required to function within District-established protocols and procedures including budget, accounting, and project tracking software.

1. Planning/Predesign Phase duties may include, without limitation:

- a) Gain familiarity with project needs, budget, and timing.
- b) Confirm scope and program requirements, including compliance with Title V requirements.
- c) Conduct meetings with site staff and design team to refine detailed scope and program, including compliance with District educational specifications and Material and Construction Standards.
- d) Review proposals received from design consultants for scope and reasonableness to provide recommendations to the District.
- e) Review proposals received from constructors for preconstruction phase for scope and reasonableness to provide recommendations to the District.
- f) Review level of effort and associated costs for reasonableness and appropriate quantity.
- g) Interact with design consultant as needed to obtain appropriate scope and level of effort.
- h) Interact with construction consultant as needed to obtain appropriate scope and level of effort.
- i) Set up a decision-making framework to ensure timely District decisions.
- j) Ensure that project is properly set up in tracking software which may include initial project schedule and budget

- k) Review invoices for reasonableness, correctness, and appropriate charges.
- l) Provide monthly status reports in prescribed format.
- m) Attend weekly program meetings.
- n) Participate in and maintain minutes of critical pre-design phase meetings.
- o) Participate in the site acquisition process and/or environmental due diligence site planning as determined by the District.
- p) Interpret and apply California Environmental Quality Act (CEQA) and State Department of Education guidelines. Assist with filing CEQA documents with appropriate State and County agencies; obtain land use and property data from County records.
- q) Participate in other meetings as required.
- r) Coordinate and communicate effectively with various consultants, agencies, regulatory agencies, other District employees, and/or others as needed.
- s) Additional tasks associated with successful project management.

2. Design Phase duties may include, without limitation:

- a) Monitor design phase schedule and progress throughout all phases.
- b) Review design phase submittals and recommend approval.
- c) Monitor project budget to ensure compliance with the District's project budget.
- d) Monitor progress of design team to ensure timely submittal of required DSA documents and retrieve verification.
- e) Ensure that project is properly maintained in tracking software.
- f) Review invoices for reasonableness, correctness, and appropriate charges.
- g) Provide weekly status reports in prescribed format.
- h) Attend weekly program meetings.
- i) Participate in and maintain minutes of critical design phase meetings.
- j) Participate in other meetings as required.
- k) Assist in bidding and award process.
- l) Participate in pre-bid meetings.
- m) Facilitate the functioning of an integrated project delivery team.
- n) Assist with any prequalification related services.
- o) Additional tasks associated with successful project management.

3. Construction Phase duties may include, without limitation:

- a) Ensure that contract is properly prepared and executed and recommend when the notice to proceed should be issued.
- b) Proactively manage changes or changed conditions on the project.
- c) Review and approve contractor's change order requests or other claims for entitlement and cost.
- d) Manage project contingencies and allowances.
- e) Monitor project budget to ensure compliance with the District's project budget.
- f) Monitor construction schedule and report variances.

- g) Monitor progress of design team to ensure submittal of required DSA documents and retrieve verification.
- h) Ensure that project is properly maintained in tracking software.
- i) Review invoices for reasonableness, correctness, and appropriate charges.
- j) Provide daily status reports in prescribed format.
- k) Attend weekly program meetings.
- l) Participate in and maintain minutes of critical construction phase meetings.
- m) Maintain project documentation in compliance with program standards.
- n) Facilitate the functioning of an integrated project delivery team.
- o) Additional tasks associated with successful project management.

4. Closeout phase duties may include, without limitation:

- a) Assist with final punch list and final inspections.
- b) Assist in review and transfer of the final warranty/guarantee.
- c) Monitor progress of design team in submitting required DSA closeout documentation and retrieve verification.
- d) Assist in review and transfer of all required maintenance and operation manuals.
- e) Assist with and/or coordinate moving activities and occupancy.
- f) Coordinate and ensure that required training on systems and materials takes place.
- g) Coordinate and monitor completion of commissioning process.
- h) Review final invoices.
- i) Review closeout documents.
- j) Reconcile expenditures and budget.
- k) Assist in the finalization of any outstanding contracts and claims.
- l) Ensure that all contract deliverables have been completed and submitted to the District.
- m) Additional tasks associated with successful project management.

5. Duties throughout the project may include, without limitation:

- a) Provide administrative support as required.
- b) Provide estimating services as required.
- c) Provide scheduling services as required.
- d) On-going review and/or processing of invoices to ensure timely payment as required.
- e) Review of contracts to ensure proper execution of scope of services related to the project as required.
- f) Provide specialized technical support as required.
- g) Miscellaneous duties related to effective and successful project management as required.

Compliance with all Applicable Laws

This response must set forth Consultant's understanding of all applicable Health and Safety laws, guidelines, and requirements including Cal/OSHA Title 8, the EPA (Environmental Protection Agency), the Education Code, the CDE (California Department of Education), the DTSC (Department of Toxic Substances Control), and DSA regulations, and local ordinances and/or other applicable zoning or planning ordinances/regulations, relative to the work to be undertaken as well as Consultant's ability to comply with the same and the methodology by which Consultants will do so.

Working Conditions

Each Consultant shall be capable of working indoors and outdoors, in all weather and site conditions including, but not limited to, rain, dirt, mud, and ice. The Consultant's activities may require kneeling, bending, climbing ladders, etc.

3 STATEMENT OF QUALIFICATIONS

Response Format

A Consultant's response shall not exceed 20 pages, excluding resumes, exhibits and other related materials. Please submit an original plus three printed copies of the SOQ and an electronic copy. Each copy of the SOQ must be single-sided, tabbed and organized in the following order and shall include all of the following sections and information as stated in this document.

NOTE for Exhibits: All Exhibits should be tabbed, labeled and included as part of the appendix. All Exhibits may be recreated as long as the formatting and information requested mirrors the PDF forms attached to this RFQ. The intent of the PDF forms is to keep all the requested information in a uniform format.

NOTE for Firms teaming with Sub-Consultants: Each responding firm shall select its proposed sub-consultants based on its own criteria. However, FUSD reserves the right to approve sub-consultants proposed for any projects that may be awarded in the future. Sub-Consultants do not need to complete all the Exhibits in this RFQ. Carefully read each section to determine which forms the Sub-Consultants need to submit.

Firm Information

Provide a Cover Letter and introduction, including the company name, address, telephone number, fax number and email address of the person or persons authorized to represent the firm regarding all matters related to the SOQ. In a narrative discussion, describe any litigation or threatened litigation against your firm or its owners that may affect your performance or completion of this proposed program. A person authorized to bind the firm to all commitments made in the

SOQ shall sign this letter. In addition, complete *Exhibit B – Firm Information* and *Exhibit C – Firm Information Questionnaire*.

Project Team

Provide identification of Consultant’s project team, key personnel and staff members and their specific expertise and experience in PM services, especially as it relates to school sites and facilities. Provide the name of a primary point of contact. Provide the names and detailed resumes of key personnel who will be available, knowledgeable, and regularly involved working with the District. In addition, list all applicable professional registration certification and/or license designations and numbers for all professional team members that are currently active in the State of California. Do not list any inactive registration and/or license designations. Please use *Exhibit D – Resume Form* and provide resumes for the proposed staff members. Provide this form for both the prime Consultant and any Sub-Consultants. The District at its sole discretion has the right to approve and remove any and all team members proposed by the Consultant.

Using *Exhibit E – Proposed Consultant Experience Form*, provide a minimum of five (5) relevant K-12 projects completed within in the last five (5) years for EACH proposed staff member. ONLY provide this form for the Project Manager and all other team members who will be working directly with the District. Prime consideration will be given to Consultants who propose staff members with experience in projects of similar size, type, and difficulty. Provide this form for both the prime Consultant and any Sub-Consultants.

In the “Project Narrative” section of the *Proposed Consultant Experience Form* provide project-specific information relating to PM services:

- Describe project and responsibilities in detail.
- Indicate proposing individual Consultant’s prior experience working for District and for other educational entities.
- Demonstrate how the individual Consultant has a thorough knowledge of code requirements for public school buildings in California.
- In addition, the Consultant must also demonstrate familiarity with Code requirements relating to school site development activities.

Also provide a minimum of five (5) completed projects with similar work in the Scope of Services listed in the RFQ. Projects listed must have been completed in the last five (5) years. Prime consideration will be given to projects of similar size, type, difficulty, and K-12 school projects.

Sub-Consultants

Provide a schedule of sub-consultant, or sub-consultant categories, if any, which are likely to be used by the Consultant in carrying out any work that may hereafter be awarded to the Consultant by the District. Identify any outside applicable disciplines that the firm may use in the course of performing services to the District associated with the firm. List names, California License or Registration Numbers, business addresses, phone numbers, fax numbers, emails, date established, and

time associated with firm. In addition, list all applicable professional registration certification and/or license designations and numbers for all sub-consultant professional team members currently active in the State of California. Do not list any inactive registration and/or license designations. Please complete *Exhibit D – Resume Form*.

Billing Rates

Provide billing rates for all personnel and/or categories of employees as well as any proposed reimbursable charges. Provide Consultant's typical fee schedule as applicable as well as any sub-consultant fees or services that may be needed.

Provide the proposed billing rate for each proposed discipline and employee. Please use *Exhibit F – Billing Rate Form*. Provide any planned escalation rate for future years if already determined. All other services not included herein shall be negotiable as required.

Consultant will **propose** an **all-inclusive** hourly fee for each of the positions described in this RFQ. Consultant's proposed fee should include and account for all direct labor costs, fringe benefits, insurance, overhead, profit, burdens and all other expenses the Consultant will incur in providing the services.

All proposed reimbursable expenses shall be directly related to the services required for the Project and must be supported by proper documentation and prior District authorization. Reimbursement shall not exceed cost plus 5%.

Certification

Consultant shall certify by completing *Exhibit G – Certification Form* that Consultant has read and received all RFQ documents for submitting a SOQ.

Non Conflict of Interest

Consultants shall certify by signing *Exhibit A – Statement of Non-Conflict of Interest*, that if selected to provide PM services required by this RFQ, Consultant shall do so as an independent contractor and not as an officer, agent or employee of the District.

Note: During the qualifications process (i.e., From the date this RFQ and/or future RFQs is released to the conclusion of the selection process), if it is determined that any individual(s) who works for or represents any interested firm communicates, contacts and/or solicits Board Members of the District in any fashion, said firm shall be disqualified from the RFQ and/or RFP selection process, and may be removed from any established pre-qualified list, as well as the removal from the "interested vendors list."

4. CONTRACT REQUIREMENTS

Insurance Requirements

Firms must have the ability to secure insurance coverage and provide proof of insurance as required by the Services Agreement.

Examples of the minimum requirements are described below:

Comprehensive general and auto liability insurance with limits of not less than one million dollars (\$1,000,000) combined single limit, bodily injury and property damage liability per occurrence, including:

- Owned, non-owned and hired vehicles;
- Blanket contractual;
- Broad form property damage;
- Products/completed operations; and
- Personal injury

Professional liability insurance, including contractual liability, with limits of \$1,000,000 per claim.

Workers' Compensation Insurance shall be maintained in accordance with provisions of the California Labor Code, adequate to protect any person, firm, or corporation employed directly or indirectly in connection with the work of the Consultant from claims under Workers' Compensation Acts which may arise for operations, whether such operations be by any person, firm, or corporation, employed directly or indirectly by the Consultant upon or in connection with the work. In no case shall this amount be less than \$1,000,000.

Fingerprinting Requirements

Unless exempted, Consultants shall comply with the requirements of Education Code Sections 45125.1 and 45125.2 with respect to fingerprinting of employees who may have contact with students within the Fillmore Unified School District. The Consultant shall also ensure that its sub consultants on a project also comply with the requirements of Sections 45125.1 and 45125.2. If the Consultant is selected to provide services to the District, the Consultant will be required to fill out the Notice of Criminal Record Checks Form. Please review and complete *Exhibit H – Notice of Criminal Records Checks* and state whether the Consultant will be able to satisfy the requirements.

5. SELECTION CRITERIA/EVALUATION PROCESS

Selection Criteria

Although not necessarily exhaustive of the criteria to be utilized by the District, the District intends to use the following evaluation criteria in selecting Pre-Qualified Consultants:

Timeliness and Completeness: To receive consideration, Consultant's SOQ must be received by the Response Deadline. In addition, Consultant's SOQ will be evaluated with respect to organization, clarity, completeness, and responsiveness to this RFQ, such as providing the minimum project team qualifications, firm information, firm headquarters, and other information referenced in all sections of this RFQ.

Technical Qualification and Competence: This includes the project team members' experience, expertise, and familiarity with the services and applicable laws and requirements for public works projects in general and school projects in particular.

Record of Past Performance: This includes work quality, completion of work on schedule, cost controls, completed projects as well as the response of references provided by the Consultant in reference to the project team members.

Evaluation

The SOQs will be evaluated by an evaluation panel consisting of individuals selected by the District. At the District's discretion, to further assist in evaluation, some, one, or all of the responding Consultants may be requested to participate in an interview. The interview will be used as another opportunity to clarify any issues within a given SOQ and explore the approaches that may be used to satisfy all District requirements. The District reserves the right to request that some or all of the responding Consultants consent to being interviewed by selected District personnel and/or representatives and/or submit additional written information.

The District also reserves the right to: (i) extend the Response Deadline, and/or (ii) send out additional RFQs.

This RFQ and any potential future RFQs, does not commit the District to award a contractual agreement with any vendor or to pay any costs incurred in the preparation of SOQs. The District reserves the right at its sole discretion to: (i) Waive or correct any defect or informality in any response, (ii) withdraw this RFQ, (iii) reissue this RFQ, (iv) reject any and/or all SOQs, (v) prior to submission deadline for SOQs, modify all or any portion of the selection procedures including deadlines for accepting responses, services to be provided under the RFQ, or the requirements for contents or format of the SOQs, (vi) waive irregularities, (vii) procure any services specified in this RFQ by any other means, (viii) determine that no projects will be pursued and/or (ix) terminate or change the contracting process articulated in this RFQ because of unforeseen circumstances.

Acceptance by the District of any SOQs submitted pursuant to this RFQ shall not constitute any implied intent to enter into an agreement for services. The District shall not be responsible in any manner for the cost associated with preparing a response/SOQ and/or participating in an interview. The SOQs, including all graphic and narrative materials, shall become the property of the District upon the District's receipt of same. The District shall have the right to copy, reproduce, publicize and/or dispose of each SOQ in any way that the District may choose.

The District reserves the right to negotiate the terms and conditions of any agreement for services that may hereafter be let by the District.

The Board of Trustees of the District reserves the right to accept or reject any or all SOQs, to select a qualified firm with or without interviews and to negotiate with any or more than one of the responsible submitters. Responses received from this SOQ will be used as the foundation for the development of an agreement and contract with specific provisions subject to review, negotiations, and approval of the Fillmore Unified School District Board of Trustees and District Superintendent or his designee.

Exhibit A

STATEMENT OF NON-CONFLICT OF INTEREST

Exhibit A

STATEMENT OF NON-CONFLICT OF INTEREST

The undersigned, on behalf of the consulting firm set forth below (the "Consultant"), does hereby certify and warrant that, if selected, the Consultant while performing the consulting services required by the Request for Qualifications, shall do so as an independent contractor and not as an officer, agent or employee of the Fillmore Unified School District ("the District"). The undersigned further certifies and warrants that: (1) no officer or agent of the Consultant has been an employee, officer or agent of the District within the past two (2) years; (2) the Consultant has not been a source of income to pay any employee or officer of the District within the past twelve (12) months; (3) no officer, employee or agent of the District has exercised any executive, supervisory or other similar functions in connection with the Consultant Agreement or shall become directly or indirectly interested in the Consultant Agreement; and (4) the Consultant shall receive no compensation and shall repay the District for any compensation received by the Consultant under the Consultant Agreement should the Consultant aid, abet or knowingly participate in violation of this statement; (5) during the qualifications process (i.e., from the date the RFQ and/or RFP is released to the conclusion of the selection process) any interested Vendor, Firm, Contractor and/or Consultant, if it is determined that any such individual(s) who work and represents such companies for business purposes communicates, contacts and/or solicits Board Members in any fashion shall be disqualified from the RFQ and/or RFP selection process, and may result in the removal of the Vendor, Firm, Contractor and/or Consultant from any pre-existing established pre-qualified list, as well as the removal from the "interested vendors list." FAILURE TO SIGN THIS FORM MAY RESULT IN A RESPONSE DISQUALIFICATION.

Signature: _____

Printed Name: _____

Title: _____

Date: _____

Exhibit B

FIRM INFORMATION

EXHIBIT B – FIRM INFORMATION

Please furnish all the following information accurately and completely. Failure to comply with this requirement will render the bid informal and may cause its rejection. Additional sheets may be attached if necessary; "You" or "your" as used herein refers to the consultant(s) firm and any of its officers, directors, shareholders, parties or principals. District has discretion to request additional information depending on the project.

(1) Firm name, address, and email information:

(2) Telephone: _____

(3) Type of firm: (check one)

Individual Partnership Corporation

(4) License No. _____ Class: _____

Name of license holder: _____

(5) Have you or any of your principals ever been licensed under a different name or different license number? Response must include information pertaining to principals' association outside of the firm bidding this Project.

No Yes

If Yes, give name and license number: _____

(6) Names, titles & contact info of at least two principals of the firm:

EXHIBIT B – FIRM INFORMATION (Continued)

(7) Name of Proposed Lead Consultant:

Year Experience Similar Work - _____ Year Experience School Work _____

(8) Name of Proposed Consultant(s):

Year Experience Similar Work - _____ Year Experience School Work _____

Exhibit C

FIRM INFORMATION QUESTIONNAIRE

Exhibit C
FIRM INFORMATION QUESTIONNAIRE

ANSWER THE FOLLOWING QUESTIONS

1. Is the company or its owners connected with other companies as a subsidiary, parent, affiliate, or holding company? Yes No
If yes, explain on a separate, signed sheet.

2. Does the company have an ongoing relationship or affiliation with an equipment manufacturer? Yes No
If yes, explain on a separate, signed sheet.

3. In the past five (5) years, has the company had any project with disputed amounts more than \$50,000 or a project which was terminated by the owner, owner's representative or other contracting party and which required completion by another party? Yes No

If yes, explain on a separate, signed sheet. State the project name, location, owner/contact person, telephone number, contract value, disputed amount, date and reason for termination/dispute.

4. Has the company, an affiliate company, or any owner ever declared bankruptcy or been in receivership? Yes No
If yes, explain on a separate, signed sheet.

5. Has the company ever had arbitration on contracts in the past five (5) years? Yes No
If yes, explain on a separate, signed sheet. State the project name, location, owner/contact person, telephone number, contract value, disputed amount, a brief description and final resolution.

6. Does the company have any outstanding liens or stop notices for labor and/or materials filed against any contracts which have been done or are being done by the company? Yes No
If yes, explain on a separate, signed sheet. State the project name, location, owner/contact person, telephone number, amount of dispute, and brief description of the situation.

THE UNDERSIGNED DECLARES UNDER PENALTY OF PERJURY THAT ALL OF THE INFORMATION SUBMITTED WITH THIS SOQ IS TRUE AND CORRECT. FAILURE TO PROVIDE BACK UP TO A "YES" ANSWER AND/OR FAILURE TO SIGN THIS DOCUMENT MAY RESULT IN A RESPONSE DISQUALIFICATION

Signature: _____
Print Name: _____
Title: _____
Date: _____

Exhibit D

RESUME FORM

Exhibit D – Resume Form

| | | |
|---|-----------------------------|------------------|
|  | Proposed Consultant Name: | Title: |
| | Firm Name: | Years with Firm: |
| | Proposed Position: | |
| Years Experience with Previous Firms: | Years with K-12 Experience: | |
| Education Specific to Position (school/year/degree/discipline) | | |
| Other Training/Experience with DSA, OPSC, DTSC, and other State Agencies (or equivalent): | | |
| Credentials/Certifications/License/Registrations/LEED Accreditation to position and years acquired: | | |
| List skills Relevant to Proposed Project: | | |

Exhibit E

PROPOSED CONSULTANT EXPERIENCE FORM

Exhibit E – Proposed Consultant Experience Form

Public Works Projects of similar nature in a School/community college/university within the last three (3) years. DISTRICT to require five references, has discretion to require additional. Please copy this page.

| | | | |
|--|---------------------------|----------------------|----------------|
|  | Proposed Consultant Name: | | Title: |
| | Firm Name: | | |
| | Project Name/District: | | |
| Project Start Date: | Project End Date: | Total Contract Cost: | Change Orders: |
| Project Scope: | | | |
| Change Order Notes (include description & reason) | | | |
| Consultant Title & Duties for this Project: | | | |
| Project Narrative (describe consultant role in accomplishing scope of work. Include detail narrative of types of analyses completed for the project. Describe the challenges and how consultant met: | | | |

Exhibit F

BILLING RATE FORM

Exhibit F

Billing Rate Form

Firm Name: _____

| PROJECT MANAGEMENT SERVICES Consultant Job Title | Hourly Rate | Daily Rate |
|--|--------------------|-------------------|
| Senior Project Manager | | |
| Project Manager | | |
| Assistant Project Manager | | |
| Project Engineer | | |
| Project Assistant | | |
| Estimator | | |
| Scheduler | | |
| Technical Specialist (specify area of expertise) 1. _____ 2. _____ 3. _____ 4. _____ | | |
| Clerical | | |

*** All licensed professionals in responsible charge of the work MUST be directly employed by the responding Consultant and NOT employed as a Sub-Consultant.**

Effective Date of Rates: _____

Signature: _____

NOTE: Consultant will *propose* an all-inclusive hourly fee for all of the services describe in Section 2 above. Consultants proposed fee should include and account for all direct labor costs, fringe benefits, insurance, overhead, profit, burdens and all other expenses the Consultant will incur in providing the services.

Exhibit G

CERTIFICATION FORM

Exhibit G

CERTIFICATION FORM

I certify that I have read and received a complete set of documents including the instructions for submitting an SOQ regarding the attached **RFQ**.

I consent to Fillmore Unified School District contacting references included in *Exhibit D – Resume Form* and *Exhibit E – Proposed Consultant Experience Form* including but not limited to other School Districts listed in the SOQ, for the purposes of obtaining information about the appraisal experience.

FAILURE TO SIGN THIS DOCUMENT MAY RESULT IN A RESPONSE DISQUALIFICATION

Signature

Typed Name

Title

Company

Street Address

City, State and Zip Code

Telephone

Fax

Date

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

Exhibit H

NOTICE OF CRIMINAL RECORD CHECKS

Exhibit H

NOTICE OF CRIMINAL RECORD CHECKS

Fingerprinting requirements

A school district contracting with any entity for the construction, reconstruction, rehabilitation, or repair of a school facility shall ensure the safety of the pupils pursuant to the requirements of the California Education Code, section 45125.2(a). It shall be the responsibility of the contracting entity to ensure that one or more of the following requirements are carried out:

- The installation of a physical barrier at the worksite to limit contact with pupils (this barrier must be a solid barricade such as a fence portable wall or wood sheathing.)
- Continual supervision and monitoring of all employees of the entity by an employee whom the Department of Justice (DOJ) has ascertained has not been convicted of a violent or serious felony. For purposes of this paragraph, an employee of the entity must submit his or her fingerprints to the DOJ pursuant to subdivision (a) of section 45125.1 of the California Education Code.
- Surveillance of employees of the entity by school district personnel.

Should the contractor **not** meet any of the requirements above, he or she must obtain a DOJ clearance before work can be started.

The Fillmore Unified School District (FUSD) requirements pertaining to fingerprinting and clearance is pursuant to the California Education Code sections 33192 and 45125.1. Education Code section 45125.1 provides that if the employees of any entity that has a contract with a school district may have any contact with pupils, those employees shall submit or have submitted their fingerprints in a manner authorized by the DOJ together with a fee determined by the DOJ to be sufficient to reimburse the Department for its costs incurred in processing the application.

Effective July 1, 2005 Penal Code section 11077.1 mandates the DOJ to only accept electronically transmitted fingerprint images from regulatory entities performing background investigations of applicants. FD 258 fingerprint cards will not be accepted. Livescan digital submissions provide the quickest way to submit and process background checks, usually within 72 hours once the company has been assigned an Originating Agency Identifier (ORI) code. The DOJ shall ascertain whether the individual whose fingerprints were submitted to it has been arrested or convicted of any crime insofar as that fact can be ascertained from information available to the Department. When the DOJ ascertains that an individual whose fingerprints were submitted to it has a pending criminal proceeding for a violent felony listed in Penal Code section 667.5(c), or a serious felony listed in Penal Code section 1192.7(c), or has been convicted of such a felony, the DOJ shall notify the employer designated by the individual of the criminal information pertaining to the individual. The notification shall be delivered by telephone and shall be confirmed in writing and delivered to the employer by first class mail.

The contractor shall not permit an employee to come in contact with pupils until the Department of Justice has ascertained that the employee has not been convicted of a violent or serious felony. The contractor shall certify in writing that none of its employees who may come in contact with pupils have been convicted of a violent or serious felony.

Penal code section 667.5(c) lists the following "violent" felonies: murder; voluntary manslaughter; mayhem; rape; sodomy force; oral copulation by force; lewd acts on a child under the age of 14 years; and felony punishable by death or imprisonment in the state prison for life; any felony in which the defendant inflicts great bodily injury on another; any robbery perpetrated in an inhabited

dwelling; arson; penetration of a person's genital or anal openings by foreign or unknown objects against the victim's will; attempted murder; explosion or attempt to explode or ignite a destructive device or explosive with the intent to commit murder; kidnapping; continuous sexual abuse of a child; and carjacking;

Penal Code section 1192.7 lists the following "serious" felonies: murder; voluntary manslaughter; mayhem; rape; sodomy by force; oral copulation by force; a lewd or lascivious act on a child under the age of 14 years ; any felony punishable by death or imprisonment in the state prison for life; any felony in which the defendant personally uses a firearm; attempted murder; assault with intent to commit rape or robbery; assault with a deadly weapon on a peace officer; assault by a life prisoner on a non inmate; assault with a deadly weapon by an inmate; arson; exploding a destructive device with intent to injure or to murder, or explosion causing great bodily injury or mayhem; burglary of an inhabited dwelling; robbery or bank robbery; kidnapping; holding of a hostage by a person confined in a state prison; attempt to commit a felony punishable by death or imprisonment in state prison for life; any felony in which the defendant personally uses a dangerous or deadly weapon; selling or furnishing specified controlled substances to a minor; penetration of genital or anal openings by foreign objects against the victim's will; grand theft involving a firearm; carjacking; and conspiracy to commit specified controlled substances.

To apply for electronic fingerprinting (Livescan), you may get the application online at:
https://oag.ca.gov/sites/all/files/agweb/pdfs/fingerprints/forms/cont_req.pdf

You can also contact Mary Whiteford at 805-524-6034 and have her mail the Livescan application to you.

Complete the California Department of Justice, Application for Authorization Pursuant to Education Code 33192, 22194.3 and 45124.1:

California Department of Justice
Bureau of Criminal Information and Analysis
Custodian of Records Unit
P.O. Box 903417
Sacramento, CA 94203-4170

The application will be processed in approximately 4-6 weeks. An ORI code will then be assigned to your company for Livescan fingerprinting.

Once the Livescan packet has been approved, and you have your ORI code for your company, fingerprinting services are available at most local police/sheriff's departments.

Applicant Live Scan fingerprints Services locations and hours of operation can be found at the following link: <http://ag.ca.gov/fingerprints/publications/contact.htm>

FINGERPRINT REQUIREMENT (ED CODE 45125.1)

CONTRACTOR CERTIFICATION

_____ (Contractor) certifies that pursuant to Education Code Section 45125.1, it has conducted criminal background checks, through the California Department of Justice, of all employees providing services to the Fillmore Unified School District, and that none have been convicted of serious or violent felonies, as specified in Penal Code Sections 1192.79(c) and 667.5(c), respectively.

As further required by Education Code 45125.1, below is a list of the names of the employees of the undersigned who may come in contact with pupils. Failure to comply with this law may result in, at District's sole discretion, termination of any agreement entered into between District and Contractor.

I declare under penalty of perjury under the laws of the United States that the foregoing is true and correct.

By _____

Title _____

Date _____

Below is a List of Employees Who May Come In Contact With Pupils

| | |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |