

**SAN BERNARDINO CITY UNIFIED SCHOOL
DISTRICT**



REQUEST FOR PROPOSALS NO. 206

FOR

Facility Management System Software

PROPOSAL DEADLINE DATE

March 8 by 12:00 P.M.

SUBMIT TO

SAN BERNARDINO CITY UNIFIED SCHOOL DISTRICT
Facilities Planning & Development and Maintenance & Operations
Departments
956 W. 9th Street
San Bernardino, California 92411
Phone: (909) 388-6100
Attention: Sherri Lien



**REQUEST FOR PROPOSALS NO. 206 FOR
FACILITY MANAGEMENT SYSTEM SOFTWARE**

The San Bernardino City Unified School District (“District”), Facilities Management and Maintenance & Operations Department, is requesting proposals from those interested in providing FACILITY MANAGEMENT SYSTEM SOFTWARE (“Services”) including but not limited to modules for creating & managing maintenance work orders and facility use scheduling and management. Copies of the Request for Proposals (“RFP”) can be obtained via e-mail, in person at the address below, or from the District’s web sites: http://sbcusd.com/district_offices/business_services_division/Purchasing/; www.sbcusdfacilities.com. The proposals must be received at the address indicated below by personal delivery or U.S. Mail by no later than **March 8, 2018 by 12:00 P.M. Pacific Time**. All qualified providers of services described in the RFP, including the local firms/individuals are encouraged to participate in this process and submit their proposals. The District, at its sole discretion, reserves the right to reject any proposals received after the deadline stated herein. The proposals must be submitted in a sealed envelope, addressed as indicated below, with the name and address of the respondent clearly printed in the upper, left corner. The envelope should be clearly printed: **REQUEST FOR PROPOSALS FOR FACILITY MANAGEMENT SYSTEM SOFTWARE**.

SAN BERNARDINO CITY UNIFIED SCHOOL DISTRICT
Facilities Management and Maintenance & Operations Department
956 West 9th Street
San Bernardino, California 92411
Contact: Sherri Lien
(909) 388-6100
sherri.lien@sbcusd.k12.ca.us

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PURPOSE OF THE RFP:

NOTICE IS HEREBY GIVEN that the San Bernardino City Unified School District (SBCUSD) Facilities Planning & Development and Maintenance & Operations Departments acting by and through their Governing Board, hereinafter referred to as the DISTRICT, is soliciting and issuing this Request for Proposals (RFP) and will receive proposals from interested parties up to, but no later than **March 8, 2018 by 3:00 p.m.**

SBCUSD is requesting proposals and pricing from qualified vendors to provide a comprehensive, cloud-based, Facility Management System (FMS). This system shall provide a paperless work order management system with the capability to also manage District "Use of Facilities" requests, including processing of facility use requests, facility scheduling, and invoicing for facility use.

The Facility Management System (FMS) provider shall provide a complete and operational FMS system per the requirements of this RFP. The product is to include all software, specialized hardware, technical support, licensing, installation, commissioning, training, travel and any related expenses necessary to implement the system as described herein. The supplier is solely responsible for making the FMS operational on existing owner computers and network equipment as described in this RFP. The system is to be delivered complete, fully functional, fully documented and the District personnel trained on its operation.

All qualified parties are encouraged to submit proposals. Proposals must be submitted in a sealed envelope, addressed as indicated on the front page, with the name and address of the respondent in the upper, left corner, under which should be clearly printed: **REQUEST FOR PROPOSALS NO. 206 - FACILITY MANAGEMENT SYSTEM SOFTWARE.**

Following review and ranking of proposals received, the District intends to establish a short list of proposing firms for interview. Upon completion of the interviews, proposing firms shall be ranked and the District intends to enter into a professional services agreement with the final selected firm(s). A sample of the anticipated professional services agreement (for information purposes only) is attached to this RFP.

For additional information regarding the District, please visit the San Bernardino City Unified School District Internet web site at www.sbcusd.k12.ca.us or by calling (909) 381-1100.

ANTICIPATED TIMELINE*:

Request for Proposals Issued.....February 8, 2018
Deadline for Submittal of QuestionsFebruary 15, 2018
Responses to the Questions Submitted..... February 22, 2018
Due Date for Submittal of Proposals.....March 8, 2018

*Dates are subject to change.

QUESTIONS AND CLARIFICATION OF THE RFP

Questions, request for explanation or clarifications in regard to this RFP shall be made in written form and submitted via email by February 15, 2018 to Sherri Lien, Facilities Management/Maintenance & Operations Department at sherri.lien@sbcusd.k12.ca.us.

The District will advise all parties known to have received a copy of the RFP of responses to the requests for explanation or clarifications by email and via posting on the District websites at http://sbcusd.com/district_offices/business_services_division/Purchasing/; and www.sbcusdfacilities.com . All parties interested in responding to the RFP are advised to check the websites for any updates.

COMMUNICATION RESTRICTIONS

To ensure a level playing field with an open and uniform competitive process, Respondents and their Representatives must adhere to restrictions on unallowable communications set below.

From the time the Request for Proposal (RFP) is announced until the time a contract award recommendation is made public by posting on the District website, Respondents and their Representatives are prohibited from making any contact on any part of a proposal, negotiation or contract with any SBCUSD official as this could appear to be an attempt to curry favor or influence. An "SBCUSD official" is broadly defined to include "any board member, employee, consultant or advisory member of SBCUSD" who is involved in making recommendations or decisions for SBCUSD.

(a) Prohibited Communication – Examples of prohibited communication by Respondents and their Representatives include, but are not limited to:

- (i) contact of SBCUSD Officials, including members of the department initiating a contract, or members who will serve on an evaluation team for any contract information that is not uniformly available to all other bidders, proposers or contractors;
- (ii) contact of SBCUSD Officials, including Board Members and their staff, to lobby on any aspect relating to a contract matter under consideration, negotiation, protest or dispute;
- (iii) contact of SBCUSD Officials in the particular department requesting a competitive contract to discuss other business or partnership opportunities.

(b) Exceptions – The following are exceptions to the Communication Restrictions:

- (i) open and uniform communications which are made as part of the procurement process such as requests for clarification or information made in writing, under the terms expressly allowed for in the RFP document; (ii) interviews or presentations to evaluation committee members which are part of the procurement process;
- (ii) negotiations with SBCUSD's designated negotiation team members;
- (iii) protests which follow the process outlined by SBCUSD's protest policies and procedures; and

(iv) requests for technical assistance approved by SBCUSD contract officials. (For example, questions relating to SBCUSD's LBOP Program.)

CONTENTS OF THE REQUEST FOR PROPOSALS

Firms must submit one (1) signed original, two (2) hard copies and a digital copy (on a compact disc "CD" or USB thumb drive) of the proposals. Proposal should not exceed 80 pages, total, not including tabs. (*Note: Pricing proposal information and Sample Agreement are not included in the page count. Proposed Fee Schedule, Reimbursable Expenses, and requested pricing by phase should be submitted concurrently with the proposal, but in a separate, sealed envelope, clearly stating the name of the proposing entity and RFP Number 206.*) Double sided printing is preferred (each side shall count as one page). Font should be no smaller than 10 point, tables and graphics excepted. The response should demonstrate the qualifications, competence and capacity of the proposing firm(s). To facilitate easier review, ***please organize your response to address the requested information in the order listed below.*** Proposals should include the following (Page limits are noted in parentheses):

1. **Cover Letter/Statement of Interest** - (1-2 pages) Include a cover letter, addressed to Sherri Lien, Business Outreach Coordinator, stating the following:
 - 1.1. Legal name of the firm to respond to this RFP,
 - 1.2. A brief description of the respondent and statement of interest.
 - 1.3. Identify any sub consultant firms or subcontractor to be involved in execution and delivery of the work.
 - 1.4. Name, title and contact information for firm's contact person for the duration of the proposal review and contract award process.
 - 1.5. A statement affirming that your proposal shall remain valid for a period of ninety (90) calendar days following the deadline for submission of proposals as set for in the RFP (and as may be amended by RFP addenda).
 - 1.6. Cover letter must be signed by individual authorized to commit the firm to the terms of the proposal.
2. **Table of Contents** – (1-2 pages, not scored) The Table of Contents shall reflect the order stated herein and shall include section titles and page numbers. Tabs identifying the proposal section numbers are preferred.
3. **Description of Firm** – (1-2 Pages) Include a summary description of firm's background and qualifications for providing the requested services. Include information regarding the size of the firm, location of the office from which the required services would be performed, nature of work performed, and years in this particular business. State the financial strength of the company as measured by cash reserves and unused line of credit from a financial institution. Any litigation pending against the company should be disclosed. The respondent shall provide an affirmative statement that it is independent of the District as defined by generally accepted standards.
4. **Personnel and Staffing Resources** –
 - 4.1. Provide an organizational chart of your proposed team. Identify any team members who are sub consultants. (2 page limit)

- 4.2. Provide a brief description of proposed staffing plan for system implementation, data transfer, training and support. (1 page)
- 4.3. Include an affirmative statement that the firm and all assigned key staff are professionally qualified to perform the requested services, capable of successfully completing District background clearance requirements (Live Scan) and hold any/all proper business or other required licenses. (1 page)
- 5. Local Businesses Participation** – Provide a plan for recruiting and utilizing local businesses within the boundaries of the City of San Bernardino and the City of Highland. Describe respondent’s involvement with San Bernardino area businesses and willingness to integrate and assist local businesses of any type who could benefit from association with the work contracted. (3 page limit)
- 6. Approach & Methodology** – Use this section to address the ability of the firm to undertake and accomplish the required scope of work for which you are requesting consideration. (Section response should be no more than 20 pages in length.)
 - 6.1. Describe how the respondent will provide services and fulfill the requirements and expectations of the District and this RFP.
 - 6.2. FMS Software System overview - Provide a detailed description of each requested application or module.
 - 6.2.1. Clearly identify which modules may be purchased separately; identify which modules require the prerequisite of another module. The system overview should explain how the proposed systems are “fit for purpose” relative to educational institutions. Include an overview of your built in standard reports for each module.
 - 6.2.2. Describe the system’s Work Order Management, Maintenance Tracking, Materials Management and Facilities Use Management modules. Describe reporting capabilities, standard reports, and custom report capability including import/export formats. Provide an overview of system capabilities and options for remote and mobile platform use. Describe ability and process to import prior work order and maintenance data.
 - 6.2.3. Discuss how existing District SAP system financial data would be incorporated into the FMS.
 - 6.2.4. Describe the system’s ability and your approach to import and incorporate and access existing site information including; GIS “geo-coding” data, site information (address, phone number, primary contact, etc.) hazardous materials survey reports, site plans and drawings.
 - 6.3. Briefly describe proposed approach to the background data collection/stakeholder outreach, system design and configuration phases.
 - 6.4. Describe your training and startup program. Explain your service program for supporting a client in starting up each module proposed. Explain the training program options available to the client and detail associated pricing. Provide details on your proven track record for launching FMS systems for K-12 clients.
 - 6.5. Describe your enhancements and upgrades policy and frequency. Provide a clear description of the upgrade and enhancement policies for all

applications proposed including detail of any associated costs. This description should provide both a quantitative history for the past three years regarding both the frequency and the extent of the upgrades that have been delivered. Clearly state both the three-year history and the policy going forward relative to both the system selling price and the total cost to the application owner for upgrades and enhancements.

- 6.6. Provide insight on firm's record of meeting schedules and deadlines of other clients;
- 6.7. Describe advantages or differentiators over other entities providing similar services.
- 6.8. Information should be furnished for both the respondent and any sub consultants included in the proposal.

7. System Reporting – Provide overview of system reporting capabilities and standard reporting menu. Describe system capabilities for generating user defined custom reports and queries, such as Work Orders by school, by project code, by craft, etc. Provide examples of at least two reports. (Section response should be no more than 10 pages in length.)

8. System Return Policy

Describe your system return policy should the District buy your system and determine that it does not meet our requirements. Please describe your return or refund policy, if any, including timeframe as well as conditions and/or limitations regarding software, training services and configuration and installation. (1 page limit)

9. System Requirements

Please describe the necessary District (client) infrastructure needed to support your proposed system including hardware, network infrastructure and personnel/skills required to support the system. Discuss system requirements for each of the following elements: (3 page limit)

- 9.1. Database Server
- 9.2. Application Server
- 9.3. Web Server / hosting
- 9.4. Skills required, needed or desired for successful implementation
- 9.5. Estimated cost of major upgrades and enhancements over three years
- 9.6. Estimated hours per year for performing database administration
- 9.7. Estimated hours per year performing data backups
- 9.8. System user operating system and hardware requirements
- 9.9. Ability to export data as MS Excel report(s)
- 9.10. System user hardware required
- 9.11. Mobile computing devices supported or required. Proposers shall indicate any additional hardware/software or network configuration requirements that are necessary to support requested mobile device capabilities.
- 9.12. Remote site requester hardware and software requirements (list any preferred computing environments and required downloads or plug-ins)

10. **System Warranties and Software Assurance** - Detail FMS software system warranties and software assurance policy and terms. (1-2 page)
11. **Proposed Timeline** – (1-2 pages, 11x17 fold out is acceptable) Provide proposed schedules in Gantt chart format, indicating major subtasks and proposed durations, start and finish dates addressing the following phases at a minimum:
 - 11.1. Discovery
 - 11.2. System Design
 - 11.3. Configuration
 - 11.4. Testing & Commissioning
 - 11.5. Handoff to District
12. **Experience and References** – Provide summary of proposed team’s experience in past performance of implementing similar FMS software systems, preferably for school districts or educational clients in California. Summarize experience for at least three (3) projects completed within the last five (5) years. (No more than 2 pages per project.) Provide the following:
 - 12.1. Project Name, and summary of the project (scope, number of facilities, etc.)
 - 12.2. Contract value
 - 12.3. System downtime history
 - 12.4. Beginning and end dates of service
 - 12.5. Client name and client reference contact information; name, title, email and telephone number.
13. **Attachments** – Attachments 1 through 6 of this RFP are issued as mandatory forms and must be completed and returned with the proposal.
 - 13.1. **“Attachment 1” Proposed Sample Agreement** - Each respondent should provide with the proposal submittal their proposed contract terms for software including configuration, installation training, support and product maintenance.
 - 13.2. **“Attachment 2” Respondent Questionnaire** – Each respondent must completely answer the questions in Attachment 2 of the RFP. Note: Attachment 2 requests information that may also be included in other sections. Please include requested information in multiple sections if requested.
 - 13.3. **“Attachment 3” Proposed Pricing/Fee Schedule** – **Note: All portions of response to Attachment 3 should be submitted concurrently with the proposal, but in a single separate, sealed envelope, clearly stating the name of the proposing entity and “Pricing Response to RFP Number 206”.** (Only one copy of the proposed pricing section is required).
 - 13.3.1. Respondents shall explain system pricing for all requested elements. If there is a license fee, detail the license fee for the first year and four individual option years.

- 13.3.1.1. Work Order Management with status communication and wireless/mobile user capability.
 - 13.3.1.2. Preventative Maintenance Scheduling system.
 - 13.3.1.3. Facility Use Management system, web-accessible by unlimited number of requestors.
 - 13.3.1.4. Material Management System.
 - 13.3.1.5. Budget Management System
 - 13.3.2. Define any separate system configuration, commissioning and/or installation fees. These fees shall be determined in the initial contract, but shall be prorated and paid on an annual basis beginning the calendar year following the full implementation of the project.
 - 13.3.3. Provide proposed pricing for Support Agreement for 1 year after completion of system commissioning and each of 4 consecutively following option years.
 - 13.3.4. Training – detail proposed training fees, including classroom time, online training systems, per diem expenses, or any other related expenses deemed necessary by Offeror.
 - 13.3.4.1. Provide training cost by system module:
 - 13.3.4.1.1. Work Order Management System and wireless/mobile uses.
 - 13.3.4.1.2. Preventative Maintenance Scheduling System.
 - 13.3.4.1.3. Facility Use Management System,
 - 13.3.4.1.4. Material Management System.
 - 13.3.4.1.5. Budget Management System
 - 13.3.5. Miscellaneous - Define any/all other related items or expenses required to perform work.
 - 13.3.6. Please note that the District does not reimburse the cost of postage, faxes, deliveries, telephone and communication, mileage and/or travel expenses to and from District offices and/or project sites.
- 14. Equal Employment Opportunity (EEO) Certification “Attachment 4” –** Proposing firm (Prime) must certify that compliance with the federal EEO requirements is met.
- 15. Worker’s Compensation Insurance Certification “Attachment 5” -** Complete and sign the Worker’s Compensation Insurance Certification form. Respondents shall describe the outcome of project-related claims, if any, filed against the respondent’s general liability or professional liability or automobile liability insurance carriers during the most recent five (5) years. Proof of Insurance for General Liability, Professional Liability, Public Liability and Auto Liability or a statement of liability shall be required from the successful respondent according to the terms of this RFP.
- 16. Business Outreach Program “Attachment 6”–** Respondents are requested to submit the District’s Local Business Outreach Program (LBOP) registration form.



The District is using this form to monitor the participation of professional service providers in the Facilities Capital Improvement Program. Copies of the LBOP registration form is attached hereto as Attachment 6.

17. **Additional Information** - Respondents are free to provide additional information or description of resources the respondent feels is pertinent to the RFP. Respondents are cautioned, however, that this does not constitute an invitation to submit large amounts of extraneous material; appendices should be relevant and brief.

PREPARATION AND SUBMITTAL OF THE PROPOSAL

Proposal Submittal and Deadline

One original, two hard copies and one digital copy of the proposal must be submitted under sealed cover by no later than **3:00 p.m. on March 8, 2018**. Mark your company name, qualification title and RFP deadline on the outside of the sealed qualification envelope or box.

Proposals shall be delivered to the attention of:

Sherrī Lien
Facilities Management/Maintenance & Operations Department
San Bernardino City Unified School District
956 W. 9th Street
San Bernardino, CA 92411
sherrī.lien@sbcusd.k12.ca.us

It is the sole responsibility of the respondent submitting the proposal to ensure that their submission is actually received in the Facilities Management/Maintenance & Operations Department office prior to the deadline time and due date. Late submissions will not be considered. Fax, email or telegraphic proposals will not be accepted.

Proposals Completeness

Proposals shall be completed in all respects as required by the instructions herein. A proposal may be rejected if it is conditional or incomplete, or if it contains alterations of form or other irregularities of any kind. A proposal will be rejected if, in the opinion of the District, the information contained therein was intended to mislead the District in the evaluation of the proposal.

District Not Responsible For Preparation Costs

All costs incurred in the preparation, submission and/or presentation of respondents to this RFP including, but not limited to, the respondent's travel expenses to attend any pre-conferences, oral presentations, long distance charges, and negotiation sessions, shall be the sole responsibility of the respondent and will not be reimbursed by District.

District shall not pay for any costs incurred for the proposal or contract preparation as a result of termination of this RFP or termination of the contract resulting from this RFP.

Right to Use Ideas

All proposals and other materials submitted become the property of the District. District reserves the right to use any ideas presented in any response to the RFP. Selection or rejection of the RFP shall not affect this right.

Modification or Withdrawal of RFP

A respondent may modify or withdraw an RFP after submission by written request of withdrawal and re-submission, provided that the RFP withdrawal or modification is prior to the due date deadline specified.

Amendments

Respondents are advised that the District reserves the right to amend this RFP at any time. Amendments will be done formally by providing written amendments to all potential respondents known to have received a copy of the RFP and/or by publishing the amendment on the District Website: www.sbcusd.com.

Equal Opportunity

The respondent shall certify that it is an Equal Opportunity Employer and has made a good faith effort to improve minority employment and agrees to meet federal and state guidelines. Legal residents of the United States of America shall be used in providing all services under this RFP.

Respondent shall not discriminate nor permit discrimination against any person because of race, color, religion, age, national origin, ancestry, creed, handicap, sexual orientation, union membership, in the performance of the work including but not limited to, preparation, manufacturing, fabrication, installation, erection and delivery of all supplies and equipment. In the event of receipt of such evidence of such discrimination by the respondent or its agents, employees or representatives, District shall have the right to rescind and terminate the Contract.

The successful respondent agrees to include the paragraph above with appropriate adjustments in all subcontracts, which are entered into for work to be performed pursuant to the Contract.

Complete the Equal Opportunity Certification form, attached herein as Attachment No. 4, and return with the RFP.

Waiver or Breach Thereof

No term or provision of this RFP shall be deemed waived and no breach excused, unless such waiver or consent shall be in writing and signed by an individual authorized to so waive or consent. Any consent by either party to, or waiver of, a breach by the other, whether express or implied, shall not constitute a consent to, waiver of, or excuse for, any other breach or subsequent breach, except as may be expressly provided in the waiver or consent.

Covenant against Gratuities

The respondent warrants that no gratuities (in the form of entertainment, gifts, or otherwise) were offered or given by the respondent or any agent or representative of the respondent, to any officer or employee of the District with a view toward securing the resultant contract or securing favorable treatment with respect to any determinations concerning the award of the Agreement. For breach or violation of this provision, the District shall have the right to terminate any negotiation or the

resultant contract, either in whole or in part, and any loss or damage sustained by the District in procuring on the open market any items which respondent agreed to supply shall be borne and paid for by the respondent. The rights and remedies of the District provided in this clause shall not be exclusive and are in addition to any other rights and remedies provided by law.

Indemnification/Insurance

The respondent, at its own expense and without exception, shall indemnify, defend and pay all damages, costs, expenses, including attorney fees, and otherwise hold harmless the District, its employees and representatives, from any liability of any nature or kind in regard to the delivery of these services. Further, the successful respondent will be required to provide to the District evidence and the amount of Errors and Omissions Insurance i.e. Professional Liability Insurance currently in effect. Limits for Errors and Omissions Insurance are \$1,000,000 for each occurrence and \$2,000,000 aggregate and the District will be named as additional insured.

Conflict of Interest

The respondent is in agreement that it presently has no interest and will not acquire any interest, directly or indirectly, which would conflict in any manner or degree with the performance of the services hereunder. The respondent further agrees that no person having any such known interest or conveyed an interest shall be employed, directly or indirectly, in the delivery of services under this RFP.

Independent Contractor

The respondent represents itself as an independent contractor offering such services to the general public and shall not represent him/herself or his/her employees to be an employee of the District. Therefore, the respondent shall assume all legal and financial responsibility for taxes, FICA, employee fringe benefits, workers compensation, employee insurance, minimum wage requirements, overtime, and other expenses.

Precedence of Documents

The contract between the District and the successful respondent shall consist of (1) this Request for Proposals (RFP) and any amendments thereto, (2) the proposal submitted by the respondent to the District in response to the RFP, and (3) the professional services agreement included herein to be executed with the successful respondent. In the event of a conflict in language between the documents referenced above, the provisions and requirements set forth in the professional services agreement shall govern. However, the District reserves the right to clarify any contractual relationship in writing with the concurrence of the respondent, and such written clarification shall govern in case of conflict with applicable requirements stated in the RFP or the respondent's proposal. In all other matters not affected by the written clarification, if any, the RFP shall govern.

Compliance with Laws

In connection with the furnishing of services or performance of work under this RFP, the respondent agrees to comply with the Fair Labor Standards Act, Equal Opportunity Employment Act, and all other applicable Federal and State laws, regulations and executive orders to the extent that the same may be applicable.

EVALUATION AND AWARD

Proposals Evaluation:

A District Evaluation Committee will determine which, if any, proposals are in the District's overall best interest to accept. During the evaluation process, the District may request additional information, clarifications, explanations and answers from any proposing respondent. (Note: Fee proposals (Attachment 3 responses) will be scored separately.)

Shortlist Interviews:

Following review of the proposals received, the District may request any or all proposing respondents to participate in a presentation and/or interview in regards to their proposal. The District reserves the right to conduct negotiations with any number of respondents, as determined by the District, for entering into contract agreements.

Shortlisted firms will be asked to provide a 45-60 minute live demonstration of the proposed software solution, highlighting system capabilities, ease of use, navigation and reporting capabilities.

Evaluation Criteria:

The evaluation of proposals will include but not be limited to the following criteria: (See "CONTENTS OF THE REQUEST FOR PROPOSALS" on page 5 for additional detail of each element.)

1. **Cover Letter** – Completeness and clarity of content (5 points)
2. **Table of Contents** (Not scored)
3. **Description of Firm** – Firm's service offerings, size, local office location(s), years in business, licenses and certifications, etc. (15 points)
4. **Personnel and Staffing Resources** – Professional qualifications and specialized experience of the proposed staff including the quality of the respondent's professional personnel to be assigned to the District. Reasonableness and quality of staffing plan. (5 points)
5. **Local Businesses Participation** – Plan for recruiting and utilizing local businesses within the boundaries of the City of San Bernardino and the City of Highland. Describe respondent's involvement with San Bernardino area businesses and willingness to integrate and assist local businesses of any type who could benefit from association with the work contracted. (5 points)
6. **Approach & Methodology** – Current capacity and likelihood of the respondent to successfully meet the needs of the District and fulfill the requirements of each Agreement issued within the timelines given. Proposed approach to each project phase, record of performance, advantages & differentiators. (30 points)
7. **System Reporting** – Provide overview of system reporting capabilities and standard reporting menu. Describe system capabilities for generating user defined custom reports and queries, such as Work

Orders by school, by project code, by funding source, etc. Provide examples of at least two reports. (10 points).

8. **System Return Policy** - (5 points)
9. **System Requirements** - (5 points)
10. **System Warranties and Software Assurance** - (10 points)
11. **Proposed Timeline** - Clarity and reasonableness of proposed schedule(s) (10 points)
12. **Experience & References** – Experience and expertise of the respondent in providing similar services/systems to other public entities of comparable size and scope, especially for school district clients in California. Quality of references. (30 points).
13. **Confirmation of Capability** – Provide a statement that firm’s proposed system meets each and every element of the Scope of Work as detailed in RFP Exhibit A. List and explain any scope element which is omitted or outside the capability of the proposed system. (20 points)
14. **Attachment 1 Acceptance of Terms** (Pass/Fail)
15. **Attachment 2 Respondent Questionnaire** – (30 points).
16. **Attachment 3 Fee / Rate Schedule** – Completeness, clarity, reasonableness and value of proposed pricing. **Note: Proposed Fee Schedule, Reimbursable Expenses, and requested should be submitted concurrently with the proposal, but in a separate, sealed envelope, clearly stating the name of the proposing entity and RFP Number 206.** (Scored separately)
17. **EEO Certification** – Must meet Federal EEO requirements. (Pass/Fail)
18. **Worker’s Compensation Insurance Certification** – Must provide proof of insurance in compliance with District’s contractual requirements. (Pass/Fail)
19. **Business Outreach Program** – Submission of completed form is required. (Pass/Fail)
20. **Additional Information** – Judged for relevance and quality as part of overall proposal scoring.
21. **Overall Proposal** – Completeness, organization and clarity of proposal content. (20 points)

Note: 200 point total + pass/fail items. Attachment 3 is scored separately.

GENERAL TERMS AND CONDITIONS

District Obligation

Receipt of proposals and responses to this RFP does not obligate the District in any way. The District reserves the right to accept or reject any or all proposals, to waive any irregularities or informalities in the respondent's submission or in the RFP process.

Award of Contract

This RFP implies no obligation to award contracts to any respondent. If it is in the best interest of the District, the District retains the sole and absolute right to select the respondent that best meets the District requirements. The award is subject to acceptance by the Governing Board of the San Bernardino City Unified School District.

Approval to Start Work

The successful respondent(s) may be assigned work once a Professional Services Agreement has been fully executed by both parties and all appropriate documentation has been received and approved by the District. The District shall not be responsible for work done, even in good faith, prior to approval of the agreement and issuance of a written Notice to Proceed (NTP) by the District.

Ownership of Documents

All proposals and materials submitted in response to this RFP shall become the property of the District and shall be considered a part of Public Records, unless exempted by law. In addition, all designs, drawings, specifications, reports, notes and other work developed in the performance of any services resulting from this RFP shall be the sole property of District and may be used by District for any purposes without additional compensation to the selected respondents. Selected respondents agree not to assert any rights or to establish any claim under the design patent or copyright laws.

No Joint Ventures

Where two or more respondents desire to submit a single response to this RFP, they should do so on a prime-subcontractor basis rather than as a joint venture or informal team. The District intends to contract with a single respondent and not with multiple respondents doing business as a joint venture.

Assignment

If a contract is issued to the successful respondent, the contract shall not be assignable in whole or in part without written consent of the District. It is the policy of the District to withhold consent from proposed assignments, or subcontracts when such transfer of responsibility would operate to decrease the District's likelihood of receiving performance on the contract. The District does not normally object to the granting of assignments for financial purposes, provided that the original respondent retains all of its responsibilities and obligations under the contract. In the event of any assignment hereunder to which the District has consented, each such assignment shall contain a provision that further assignments shall not be made to any third or subsequent party without any additional written consent of the District.

Respondent's Power and Authority

The respondent warrants that it has full power and authority to grant the rights herein granted and will hold the District hereunder harmless from and against any loss, cost, liability, and expense (including reasonable attorney fees) arising out of any breach of this warranty. Further, respondent declares that it will not enter into any arrangement with any third party, which might abridge any rights of the District under this contract.

Disputes

If a dispute arises among the parties hereto, the parties agree first to try in good faith to settle the dispute among them via agreement and thereafter by mediation administered by the American Arbitration Association under its Commercial Mediation Rules before resorting to litigation. All parties shall share the costs of any mediation proceedings equally.

Fingerprinting / Background Clearance

Per the provisions of the Education Code Section 45125.1, the District has a zero tolerance for all respondents having any contacts with students without any clearance from the State Department of Justice. All assigned personnel to active and occupied school sites shall comply with the fingerprinting clearance law prior to providing services at the school sites.

EXHIBIT A

Scope of Services / Statement of Work

1. Background –

San Bernardino City Unified School District (SBCUSD) supports a vast population in southern California. It is our mission to provide a safe, secure, and functional public education environment for over 53,150 students and employees on more than 74 campuses serving grades K through 12 and the public.

From our District offices in the city of San Bernardino each day we operate and maintain public school campuses and administrative facilities, providing planning and capital construction services, repair and replacement of capital assets, property management, custodial service, landscape maintenance, and utility management.

2. Description of Services:

SBCUSD is requesting proposals and pricing from qualified vendors to provide a comprehensive, cloud-based, Facility Management System (FMS). This system shall provide a paperless work order management system with the capability to also manage District "Use of Facilities" requests, including processing of facility use requests, facility scheduling, and invoicing for facility use.

3. FMS users and responsibilities

3.1.1. Administrator responsibilities consist of members of management whose responsibilities include the conversion of work requests into active work orders, scheduled preventive maintenance, closing of completed work orders, software access control, and the ability to track financial and project information.

3.1.2. District Staff responsibilities consist of generating and completing assigned work orders and recording all work details resulting from a maintenance activity.

3.1.3. Requestor responsibilities consist of the ability to submit a work request through a user view interface including the ability to review previously submitted requests for their building or site.

3.1.4. Facility Use Management system shall support both internal and external users via a web-based system allowing an unlimited number of users.

4. Project Goals

The District's goals for the implementation of a FMS include:

4.1.1. Transfer of the existing data regarding facilities and the resources required to maintain and renew them.

4.1.2. Streamline preventive maintenance and proactive asset renewal programs.

4.1.3. Automate and incorporate Facility Use scheduling, tracking and invoicing into the FMS.

4.1.4. Accurate O&M cost tracking.

- 4.1.5. Utilize an electronic work order management system to log staff labor, material, equipment costs and vendor provided service costs.
- 4.1.6. Ensure long-term reliability of system data storage and retrieval, including associated documentation such as standard operating procedures and O&M manuals.
- 4.1.7. Ability to track and update work status.
- 4.1.8. Fast and accurate operation of the program within the District IT network, offsite and on mobile devices.
- 4.1.9. Comprehensive program reporting and dashboard capabilities.
- 4.1.10. Ability to export reports to MS Excel format.
- 4.1.11. Link multiple work orders to a project, establish project budget and prioritize projects.
- 4.1.12. Ability to attach media files to work orders and asset information
- 4.1.13. Ability to visually schedule personnel by assigning incoming work orders to specific staff with “drag and drop” ease, but not limited to drag and drop.
- 4.1.14. Ability to monitor and record training and certifications of staff.
- 4.1.15. Ability to record inventory of parts and materials and issue pre-purchase order parts requests for on-time delivery of planned replacement parts.
- 4.1.16. Ability to connect to District’s (County’s) financial systems (Financial 2000) to post labor and material expenses.

5. System Overview & Minimum Requirements

- 5.1. The Facility Management System (FMS) provider shall provide a complete and operational FMS system per the requirements of this RFP. The product is to include all software, specialized hardware, technical support, licensing, installation, commissioning, training, travel and any related expenses necessary to implement the system as described herein. The supplier is solely responsible for making the FMS accessible and operational on existing owner computers. The system is to be delivered complete, fully functional, fully documented and the District personnel trained on its operation.
- 5.2. The system shall have the ability to interface and manage data from the District’s existing facility management system.
- 5.3. All modules of the system shall have the ability to incorporate existing District account codes using a 25 character alpha-numeric format.
- 5.4. The District’s core business systems that will be integrated with the FMS system are outlined below:
 - 5.4.1. Financial system
 - 5.4.2. Labor management system
 - 5.4.3. Work Order Management

5.4.4. Geographic information system: ESRI ArcGIS 10.5.1.

5.4.5. Email system: Microsoft Outlook, Microsoft Office.

5.4.6. Desktop applications: Support of MS Word, Excel, and Access files (2013 versions).

5.5. Vendor shall be responsible for the successful transfer of data from the existing system(s).

5.5.1. Vendor shall be responsible to import maintenance staff training records, wage rate information and staff categories.

5.5.2. Vendor shall be responsible to import existing asset data, including attachment of pre-collected photos and documents to asset records, hazardous materials reports, etc.

5.5.3. Vendor shall be responsible to import existing vendor and supplier records, rate information and categories.

5.5.4. Vendor shall be responsible to import prior work order records.

5.6. Training:

5.6.1. Vendor shall provide client consultation on system requirements, comprehensive training of all system users, network and hardware configuration as needed to support the FMS cloud-based system.

5.6.2. Provide hard copy and electronic training material and user manuals for new users.

5.6.3. Training may be required to be on site. Provide details of the training plan and opportunities. The District prefers an approach to first “Train the Trainers” and train system “Super-users”.

5.6.4. Training should be able to convey how to operate the program accurately in a reasonable amount of time.

5.6.5. For each training topic, provide two training sessions at least one week apart to accommodate staff scheduling conflicts.

5.6.6. Provide option of on-line accessible training.

6. Work Order Module

The FMS system shall have a work order module that will enable the District to process work orders and capture all maintenance labor and costs. The system shall support and or include the following features:

6.1. The FMS system software shall be configured to allow remote non-maintenance personnel to request service from the District maintenance department through an internet web browser.

6.2. The system shall include a database of maintenance employees along with name, identification number, title/classification, salary or labor rate, training records, etc.

- 6.3. The system shall include a database of vendors, with capability of recording vendor approval status, contract status and notes.
- 6.4. The system shall include a capability of emailing work orders to designated vendor(s).
- 6.5. Ability to capture/record labor hours, contract costs, and material costs for each work order.
- 6.6. Tracking of work request dates, response dates and completion dates.
- 6.7. Users can perform ad hoc queries of work orders using multiple complex search criteria and multiple sorting criteria.
- 6.8. Customer work requests can be assigned priorities.
- 6.9. Work orders can be defined according to the type and scope of work involved. Manage work requests and work order assignments to appropriate divisions (e.g. plumbing, electrical, etc.).
- 6.10. Users can create sets of commonly needed work plans for use and reuse in the creation of work orders.
- 6.11. Trade Shop can be added to or deleted from existing work orders.
- 6.12. Work orders can be printed individually or in batches.
- 6.13. Work orders include a searchable, variable length text description field large enough to hold at least 500 characters.
- 6.14. Work order fields (other than work order number) are editable subsequent to entry.
- 6.15. The FMS software can record information about work requestors such as name, phone number, and email address.
- 6.16. The software can record information about rental equipment use, rates, equipment location, scheduled delivery dates and pick up dates.
- 6.17. The software can record information about estimates including estimated and actual cost and hours and can generate reports on actual versus estimated costs.
- 6.18. System has ability to capture labor hours, contract costs and material costs for each work order.
- 6.19. The software includes user definable work order tracking fields such as trade, purpose, budget and other codes.
- 6.20. Requests can be routed on-line to personnel authorized for review and approval.
- 6.21. The software includes ability for on-line check of status of request.
- 6.22. The software includes ability to work on requests from multiple sites simultaneously.

- 6.23. Includes work order entry software capable of being configured to print quality assurance questionnaires, customized messages, surveys, etc., every set number (customizable) of work orders, by craft or by total.
- 6.24. Includes comment area with ability to insert not less than 1000 characters, as well as graphics in order to provide greater detail to the work request.
- 6.25. Work orders can be electronically routed to shops and others.
- 6.26. A field identifying the work order data entry operator is included.
- 6.27. Space, equipment, and asset descriptions and work procedures can be included on work orders.
- 6.28. Work orders can be routed to appropriate remote printers depending on the shops assigned.
- 6.29. Allows for internal billing of work.
- 6.30. The software permits concurrent work order entry from multiple client PCs.
- 6.31. The software permits multiple levels of security.
- 6.32. The software has ability to generate Key Performance Indicators (KPIs) such as work order completion rate, ratio of completed work open work orders to completed work orders, etc.
- 6.33. The software includes the ability to authenticate internal staff with access or links to an active Directory.
- 6.34. System includes a database of vendors.
- 6.35. System records and tracks equipment downtime.
- 6.36. System allows for charging multiple wage rates.
- 6.37. System allows automatic computation of work costs using labor rates in employee system.
- 6.38. Supports work order tracking fields such as trade, purpose, budget and other codes, and permits sorting and reporting by these criteria and other User-definable fields.
- 6.39. Provides an easy interface to check work order status with selection masks.
- 6.40. Provides search capacity on work order number or description (key word search).
- 6.41. Software is fully integrated with related systems including preventative maintenance, facility use scheduling and inventory.
- 6.42. System tracks tool usage against work orders
- 6.43. System tracks required permitting of requested work items.
- 6.44. Authorized users can re-open closed work orders.
- 6.45. System shall include the following Remote School Site Request and Status Communication capabilities

- 6.45.1. The system should allow the remote site requesters to be provided status updates on requests that have been previously submitted. These status updates should be filtered or password protected so that the requester only sees requests that have been previously submitted by him/her.
- 6.45.2. The system should support email notifications that allow the Maintenance & Operations department to automatically notify work order requesters when work is received, completed, or when work is delayed due to delayed part orders or other reasons.
- 6.45.3. Each completed or closed work order will provide internal client with a link to an on-line survey entity (Survey Monkey or equal).

6.46. Wireless/Mobile Management Capabilities:

- 6.46.1. The system should include the option to enable mobile workers to receive, process and log work via a wireless/mobile device.
- 6.46.2. The mobile users should be able to create new work orders, record transactions, and search for work orders by location/trade shop/etc.
- 6.46.3. Mobile users should have the ability to mark the work order complete via the mobile device.
- 6.46.4. System enables mobile workers to search and sort through their work orders.

7. Preventative Maintenance Scheduling System

FMS shall include a Preventive Maintenance Scheduling System capable of the following:

- 7.1. The preventive maintenance scheduling system will allow the district to setup recurring preventive maintenance activities including tasks, safety checkpoints, parts and materials, frequencies, and estimated/actual time information. This system will allow the district to schedule, track, and report on preventive maintenance activities.
- 7.2. The preventive maintenance scheduling should help create, assign and manage recurring maintenance tasks efficiently.
- 7.3. Track all scheduled maintenance in a searchable database, accessible by facility, system, and due date.
- 7.4. Generate recurring maintenance schedules on a daily, weekly, monthly, quarterly or annual basis.
- 7.5. Store schedule templates or task boilerplates for quick creation of frequently used schedules.
- 7.6. Track equipment information, including manufacturer, model #, and serial #, service dates, and warranty expirations.
- 7.7. Store information on assets and equipment such as buildings, rooms, tools, supplies, vehicles, or other material items of value.

- 7.8. Asset and equipment work order histories, including accumulated costs, can be recorded, and these records are directly available from asset display windows.
- 7.9. Have the capability and capacity to track and store the preventive maintenance (PM) histories of assets and equipment for ten years or longer.
- 7.10. Asset and equipment records can contain or reference information on warranties and service contracts.
- 7.11. The software alerts selected users to impending expiration of warranties with user definable lead times.
- 7.12. Maintenance Scheduling interfaces with work order module to automatically generate maintenance work orders.
- 7.13. Can report on preventative maintenance by asset, location, building, and/or employee.
- 7.14. Preventive maintenance activities can be scheduled on specified dates, days of the week, days of the month, and may be restricted to specified seasons.
- 7.15. Sets of PM tasks can be defined for groups of similar equipment.
- 7.16. Existing PM plans can be copied to create new PM plans.
- 7.17. The software can generate reports of overdue PM orders.
- 7.18. Various canned and user-defined asset tracking reports by asset, asset type, location, building.
- 7.19. Automatically generate preventive maintenance work orders via integration with a work order system.
- 7.20. Display future scheduled work in a calendar format for resource scheduling.

8. Facility Use Management

FMS software shall include the following Facility Use management features:

- 8.1. Online (web accessible) Facility Use Request system to facilitate the entry, tracking and management of facility use requests from internal and external groups.
- 8.2. Provides Facility Use tracking, scheduling and rental administration.
- 8.3. Provides Facility Use master calendar.
- 8.4. Facility Use reporting to remote users (Campus Administration, School Police, M&O, etc.)
- 8.5. Facilitate Communication/Notification of Scheduled Users.
- 8.6. User Insurance Certificate electronic filing and tracking.
- 8.7. Facility Use support services scheduling (janitorial, security, etc.)

- 8.8. Allows District to incorporate current 25 alphanumeric character internal budget codes.
- 8.9. Support multiple routing rules for event approval.
- 8.10. Automatically routes usage request requests to the designated approval managers.
- 8.11. Provides database of facilities and areas available for after hour usage.
- 8.12. System manages events with multiple dates with repeating patterns as well as random series of events.
- 8.13. Tracks facility usage fees and automatically generates invoices. Tracks status of invoices.
- 8.14. Enables event requesters to check facility availability and submit user requests online.
- 8.15. Displays scheduled events on calendar.
- 8.16. Allows for multiple levels of security.
- 8.17. Supports email notifications to support personnel (School Police, M&O staff, Campus Administration, etc.)

9. Materials Management

The FMS software shall include the following Materials Management abilities and features:

- 9.1. Manage inventory items by category types: mechanical, custodial, tools and other criteria.
- 9.2. Tracks all inventory transactions, including issues, receipts, returns, adjustments, orders and transfers.
- 9.3. Allows inventory to be issued to a location, pick list, project, work order or employee.
- 9.4. Enables requestor the ability to select items from inventory catalogs and submit inventory requests online.
- 9.5. Enables users to request quotes for inventory items from multiple suppliers while reordering.
- 9.6. Tracks detailed information on inventory items, including unit of issue, on contract, supplier, average or fixed cost, tag number for tools, mark up and backorder quantity.
- 9.7. Allows District to incorporate current 25 alphanumeric character internal budget code format.
- 9.8. Allows inventory items to be stored and tracked in multiple pools and by crafts, including aisle, bin number and reorder points.
- 9.9. Automatically emails requestors with inventory requests receipts and updates of order status changes.

- 9.10. Integrates with the work order and preventative maintenance system.
- 9.11. Allows for use of ISO certified units of measure.
- 9.12. Provides pick lists.
- 9.13. Allows for optional parts inspection requirement per part.

10. FMS Reporting Capabilities:

The FMS shall allow for tracking and reporting of data in categories as follows:

- 10.1. Facilitates production of summary level or detailed reports by:
 - 10.1.1. Craft
 - 10.1.2. Location
 - 10.1.3. Budget
 - 10.1.4. Employee
 - 10.1.5. Craft cost analysis
 - 10.1.6. Transactions
 - 10.1.7. Outstanding work
 - 10.1.8. Workloads and assignments
 - 10.1.9. Status of work
- 10.2. Standard Inventory Reports - Provide summary or detailed reports by:
 - 10.2.1. Issued inventory
 - 10.2.2. Returned inventory
 - 10.2.3. Transferred inventory
 - 10.2.4. Supplier reports
 - 10.2.5. Pick list reports
- 10.3. Standard Preventative Maintenance Reports – Provide summary or detailed reports by:
 - 10.3.1. Projected parts and supplies reports
 - 10.3.2. Estimated PM labor reports
 - 10.3.3. Forecasting labor report
 - 10.3.4. Corrective vs. preventative maintenance report
- 10.4. Standard Facility Scheduling Reports – Provide summary or detailed reports by:
 - 10.4.1. Location
 - 10.4.2. Organization
 - 10.4.3. Schedules

- 10.4.4. Budget
- 10.4.5. Invoices
- 10.4.6. Reminders

11. Budget Management (OPTIONAL)

The following capabilities are optional. Proposer shall indicate which are included in proposed FMS software:

- 11.1. Allows District to incorporate current 25 alphanumeric character internal budget code format.
- 11.2. Permits flexible budget terms and budget period.
- 11.3. Provides for flexible budget hierarchies.
- 11.4. Allows for analysis of costs vs. budget per budget period and year.
- 11.5. Facilitates the creation of long-range capital plans and budget plans.
- 11.6. Manages capital projects and expenditures related to deferred maintenance, deficiencies and corrections.

12. Acceptance Testing

- 12.1. There will be a thirty (30) day error free testing acceptance period. Any errors, fixes or other changes to the system shall automatically re-set the “clock” for another thirty days, until all fixes are made and the program runs error free.
- 12.2. If the District determines that the Product(s) do not perform substantially in accordance with the criteria as set forth in this document, the District will notify the vendor in writing of the specific discrepancies. If these discrepancies are not resolved in 45 days to the District’s satisfaction, the District has the option of terminating the Contract, returning the Product(s), and receiving a total refund for all monies spent with the Vendor.

END Of Exhibit A – Scope of Work



ATTACHMENT 1

Respondents are to provide with the proposal submittal their proposed contract terms for software including configuration, installation training, support and product maintenance.

**ATTACHMENT 2
RESPONDENT QUESTIONNAIRE**

The respondent shall furnish all the following information accurately and completely for the Respondent and each of the proposed staff. Failure to comply with this requirement may cause rejection of the respondent's proposal. Additional sheets may be attached if necessary. "You" or "your" as used herein refers to the respondent and/or any of its owners, officers, directors, shareholders, parties or principals.

If the same information is provided elsewhere in your qualification and qualification materials, then please clearly identify such in the following questions.

Please be advised that the District may request verbal or written clarifications, additional information, an interview or presentation at any time regarding this questionnaire.

SECTION A – GENERAL INFORMATION

(1) Respondent name, address and contact information:

(2) Telephone: _____ Facsimile: _____

Email and Internet Addresses: _____

(3) Type of respondent: (check one)
 Individual Partnership Corporation State:

(4) Names and titles of all principals/officers of the respondent:

Name	Title	Phone Number
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

(5) Please list any applicable certifications and licenses and their associated numbers:

(6) Have you or any of your principals ever conducted similar services under a different name or certification or different license number? _____

a. If yes, give respondent name, address and certification or license number.

(i) Name _____

(ii) Address _____

(iii) License No. (if any) _____

(7) How many years has respondent been in business under its present business name?

(8) How many years of experience does respondent have providing similar services or systems?

(9) For how many public agencies has respondent provided similar services or systems?

(10) Please list the public agencies, including any school districts, where respondent has provided similar services: *(Use additional sheets as necessary)*

(11) Separately list any services that respondent has previously provided for the San Bernardino City Unified School District. State the name, scope and size of each project, and the beginning and ending dates of services. If none, state as such.

(12) Financial Information: Provide a statement of corporate structure and financial status. State the financial strength of the company as measured by cash reserves and unused line of credit from a financial institution. *(Use additional sheets as necessary)*

Attachment 2 - SECTION B – LEGAL *(use additional pages as required)*

- (13) Have you or any of your principals been in litigation or arbitration of any kind on a question or questions relating to similar services involving a school or community college district during the prior five (5) years? If yes, provide the name of the public agency and briefly detail the dispute:

- (14) Furnish and provide specific information on any termination for cause, litigations settled or judgments entered within the last five (5) years, and civil judgments or criminal convictions for false claims within the last five (5) years involving the respondent. Have you ever had a service agreement terminated for convenience or cause in the prior five (5) years? If yes, provide details including the name of the other party:

- (15) Is respondent, owners, and/or any principal or manager involved in or is respondent aware of any pending litigation regarding professional misconduct, bad faith, discrimination, or sexual harassment? If yes, please provide details.

- (16) Is respondent, owners, and/or any principals or manager involved in or aware of any pending disciplinary action and/or investigation conducted by any local, state or federal agency?

- (17) Does respondent maintain errors and omissions coverage? If so, please provide a current copy of the declaration page showing the maximum liability or policy value.

- (18) Will respondent comply with all District, local, State and Federal legal requirements, regulations and laws? Yes / No (circle one)

Attachment 2 - SECTION C – ADDITIONAL INFORMATION

- (19) Please provide any other information that may assist the District in ascertaining your qualifications, capability and customer service under any resultant agreement.

SECTION D – CONFLICT OF INTEREST

- (20) Have you ever had any direct or indirect business, financial or other connection with any official, employee or consultant of the District? Yes / No (circle one).
Identify any conflict of interest in (a) below:

(a) Please elaborate and discuss any potential, apparent or actual conflict of interest:

*I certify and declare under penalty of perjury under the laws of the State of California that the foregoing responses to **Attachment 2 - Respondent Questionnaire pages one (1) through four (4)** are true and correct.*

Executed this _____ day of _____, 2017, at
_____, State of _____.
City, County

_____	_____
Company Name	Signature
_____	_____
Title	Print Name

ATTACHMENT 3 PROPOSED PRICING / FEE SCHEDULE

The respondents are required to provide their proposed fees in the format shown below. The proposed fees shall be used as only one of several criteria for selection of pre-approved firms.

Note: All portions of response to Attachment 3 should be submitted concurrently with the proposal, but in a single separate, sealed envelope, clearly stating the name of the proposing entity and "Pricing Response to RFP Number 206". (Only one copy of the proposed pricing section is required).

1. Respondents shall explain system pricing for all requested elements. If there is a license fee, detail the license fee for the first year and four consecutive single year option years (calendar years) following Date of Final Completion. Detail fees by System module:
 - a. Work Order Management with status communication and wireless/mobile user capability.
 - b. Preventative Maintenance Scheduling system.
 - c. Facility Use Management system, web-accessible by unlimited number of requestors.
 - d. Material Management System.
 - e. Budget Management System
2. Define any separate system configuration, commissioning and/or installation fees. These fees shall be determined in the initial contract, but shall be prorated and paid on an annual basis beginning the calendar year following the completion of the project. (Note that years 2 through 5 are individual option years.)
3. Provide proposed pricing for Support Agreement for the initial year and each of four 1 year option years after completion of system commissioning.
4. Training – detail proposed training fees, including classroom time, online training systems, per diem expenses, or any other related expenses deemed necessary by Offeror.
 - a. Provide training cost by system module:
 - i. Work Order Management System and wireless/mobile uses.
 - ii. Preventative Maintenance Scheduling System.
 - iii. Facility Use Management System,
 - iv. Material Management System.
 - v. Budget Management System
5. Miscellaneous - Define any/all other related items or expenses required to perform work.
6. Please note that the District does not reimburse the cost of postage, faxes, deliveries, telephone and communication, mileage and/or travel expenses to and from District offices and/or project sites.

IMPORTANT: Each page of the pricing proposal must include the following information:

Name of Proposing Entity: _____

Authorized Signature: _____

Signatory Name & Title (printed) _____

Page ____ of ____ (page number)



**ATTACHMENT 4
EQUAL OPPORTUNITY CERTIFICATION**

To: San Bernardino City Unified School District
956 W. 9th Street
San Bernardino, CA 92411

Respondent (Firm Name) _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Telephone (_____) _____ FAX (_____) _____

Number of Employees _____

This respondent is (check and complete appropriate line):

Independently Owned and Operated

An Affiliate of _____ Parent Company _____

A Subsidiary of _____ Address _____

A Division of _____

The undersigned certifies that firm is an Equal Opportunity Employer and firm has made a good faith effort to improve minority employment.

Firm Name: _____

Signature _____

Signatory's Name: _____

Title _____

Date _____

**ATTACHMENT 5
RESPONDENT 'S CERTIFICATE
REGARDING WORKMEN'S COMPENSATION**

Labor Code Section 3700:

“Every employer except the state and all political subdivisions or institutions thereof, shall secure the payment of compensation in one or more of the following ways:

- (a) By being insured against liability to pay compensation in one or more insurers duly authorized to write compensation insurance in this State.
- (b) By securing from the Director of Industrial Relations a certificate of consent to self-insure, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to his employees.

I am aware of the provisions of Section 3700 of the Labor Code which require every employer to be insured against liability for Workmen's Compensation or to undertake self-insurance in accordance with the provision of that code, and I will comply with such provisions before commencing the performance of the work of this contract.

Proposing Firm

Authorized Signature

Name (Printed)

Title

(In accordance with Article 5 [commencing at Section 1860], Chapter 1, Part ____ Division 2 of the Labor Code, the above certificate must be signed and filed with the awarding body prior to performance of any work under this contract.)

ATTACHMENT 6

Building Schools
Building Education
Building Opportunities



BUSINESS OUTREACH PROGRAM				
Company Information		Contact Information		
Company Name	Name		Title/Position	
Address	Cell phone - - -			
City	Office phone - - -			
State Zip	Fax - - -			
Web Address	E-mail			
Ownership Type (check type)	Firm Size	License(s)	Business Certification (check all that apply)	
<input type="checkbox"/> Sole Proprietor	Gross Revenue \$/yr	<input type="checkbox"/> A. General Engineering	<input type="checkbox"/> Small Business Enterprise (SBE)	
<input type="checkbox"/> Corporation	# of Employees:	<input type="checkbox"/> B. General Building	<input type="checkbox"/> Disabled Veteran-owned Business Enterprise (DVBE)	
<input type="checkbox"/> Partnership		<input type="checkbox"/> C. Specialty	<input type="checkbox"/> Minority-owned Business Enterprise (MBE)	
<input type="checkbox"/> Nonprofit			<input type="checkbox"/> Woman-owned Business Enterprise (WBE)	
<input type="checkbox"/> Other:			<input type="checkbox"/> Other:	
Services, Business Goods (check all that apply)				
<input type="checkbox"/> Architecture	<input type="checkbox"/> Environmental	<input type="checkbox"/> Inspection	<input type="checkbox"/> Special Construction	
<input type="checkbox"/> Communications/ IT	<input type="checkbox"/> Equipment	<input type="checkbox"/> Legal	<input type="checkbox"/> Specialties	
<input type="checkbox"/> Concrete	<input type="checkbox"/> Exterior Improvements (including landscape/irrigation)	<input type="checkbox"/> Masonry	<input type="checkbox"/> Surveying	
<input type="checkbox"/> Conveying systems	<input type="checkbox"/> Financial	<input type="checkbox"/> Metals	<input type="checkbox"/> Thermal and Moisture	
<input type="checkbox"/> Demo/Remediation	<input type="checkbox"/> Finishes	<input type="checkbox"/> Moving/Storage	<input type="checkbox"/> Utilities	
<input type="checkbox"/> Doors and Windows	<input type="checkbox"/> Fire Suppression	<input type="checkbox"/> Plumbing	<input type="checkbox"/> Woods and Plastics	
<input type="checkbox"/> Earthwork	<input type="checkbox"/> Furnishings	<input type="checkbox"/> Portable Facilities	<input type="checkbox"/> Other:	
<input type="checkbox"/> Electrical	<input type="checkbox"/> General Contracting	<input type="checkbox"/> Real Estate, Appraisal, Property Management		
<input type="checkbox"/> Engineering	<input type="checkbox"/> HVAC	<input type="checkbox"/> Safety and Security		
Local Business Outreach Profile (if applicable)				
1. Local Business Identification				
<input type="checkbox"/> Located in City of San Bernardino or Highland <input type="checkbox"/> Located in San Bernardino County				
2. How do you prefer to receive notices for SBCUSD opportunities?				
<input type="checkbox"/> Telephone <input type="checkbox"/> Fax <input type="checkbox"/> E-mail				
3. How do you normally receive notices for SBCUSD opportunities? <input type="checkbox"/> District Website <input type="checkbox"/> Chamber <input type="checkbox"/> Trade Assoc. <input type="checkbox"/> Plan Room <input type="checkbox"/> Newspaper <input type="checkbox"/> Mail <input type="checkbox"/> Other:				