



REQUEST FOR PROPOSALS NUMBER 166
FEE JUSTIFICATION STUDY AND
SCHOOL FACILITIES NEEDS ANALYSIS CONSULTING SERVICES

INTRODUCTION

- 1) The San Bernardino City Unified School District ("District") is seeking proposals ("Proposal") from qualified professional consultants ("Consultant") who are specially trained, experienced and competent to perform the special services required in the preparation of and the adoption of a Residential/Commercial Fee Justification Study ("FJS") and a School Facilities Needs Analysis ("SFNA") pursuant to California Education Code Section 17620 *et seq.*, California Government Code Section 65995 *et seq.*, and California Government Code Section 66000 *et seq.*
- 2) The District is located in the heart of the Inland Empire area of Southern California. The District serves the City of San Bernardino, part of the City of Highland, and the unincorporated communities of Muscoy and Devore. The District is currently the ninth largest school district in California with 72 schools in operation and a student enrollment of approximately 54,000 students.
- 3) This Request for Proposal ("RFP") does not commit the District to award a contract, or pay any costs incurred by a Consultant in preparation of a Proposal in response to this RFP. The District reserves the right to accept all or part of any proposal or to cancel in part, or in its entirety, this RFP. The District further reserves the right to accept the Proposal that it considers to be in the best interest of the District.
- 4) This RFP is in essence a request for two proposals; that is, one proposal to provide special services required in the preparation of and the adoption of a FJS and a second proposal for special services required in the preparation of and the adoption of a SFNA.
- 5) Each Consultant responding to this RFP shall comply with all of the requirements herein. Failure to strictly comply with all of the requirements set forth in this RFP may result in the Proposal being deemed nonresponsive.

FJS REQUIRED SERVICES

- 6) The Consultant shall have the capability to perform the following services ("Required Services") for the District relating to the preparation of and adoption of the FJS:



- a) Review and set forth the District's determination of new construction eligibility based on a review of SAB forms 50-01, 50-02, and 50-03.
 - b) Determine the purpose of the statutory school fees.
 - c) Identify the use to which the statutory school fees are to be put.
 - d) Determine how there is a reasonable relationship between the statutory school fees use and the type of development project on which the fee is imposed.
 - e) Determine how there is a reasonable relationship between the need for the public facility and the type of development on which the fee is imposed.
 - f) Delivery of the final FJS
 - g) Adoption of final FJS, including:
 - i. Assisting staff in responding to written comments, if any, by others
 - ii. Assisting staff in preparing for and attending meetings, if any, with others
 - iii. Attending public hearing and adoption Board meeting
- 7) The FJS shall meet all requirements of applicable law including, but not limited to, California Education Code Section 17620 *et seq.*, California Government Code Section 65995 *et seq.*, and California Government Code Section 66000 *et seq.*

SFNA REQUIRED SERVICES

- 8) The Consultant shall have the capability to perform the following services ("Required Services") for the District relating to the preparation of and adoption of the SFNA:
- a) Review and set forth the District's determination of new construction eligibility based on a review of SAB forms 50-01, 50-02, and 50-03.
 - b) Determine which of the four statutory requirements pursuant to Government Code Section 65995.5 the District satisfies in order to levy Alternative School Fees.
 - c) Projection of unhoused students in the District from future residential development over the next five years by housing type, and calculation of unhoused pupils projected to exist in the District at the end of the next five years.
 - d) Review of current District facilities and determination that facilities are being used to their optimal potential; review of surplus school sites, existing surplus local funds of the District, and any Redevelopment Agency pass-through funds available to the District.
 - e) Confirmation of future development projections and projected total square footage with local cities and County
 - f) Determination of impact of residential redevelopment within District
 - g) Determination of the permissible Level 2 and Level 3 Alternative School Fees that may be established by the District
 - h) Delivery of the SFNA to the District
 - i) Adoption of final SFNA, including:



- i. Assisting staff in responding to written comments, if any, by others
 - ii. Assisting staff in preparing for and attending meetings, if any, with others
 - iii. Attending public hearing and District adoption Board meeting
 - iv. Attending meetings required pursuant to California Government Code Section 65352.2
- j) The SFNA shall meet all requirements of applicable law including, but not limited to, California Education Code Section 17620 *et seq.*, California Government Code Section 65995 *et seq.*, and California Government Code Section 66000 *et seq.*

PROPOSAL REQUIREMENTS

• Section 1 - General Information

- a) Years in Business. State the number of years Consultant's organization has been providing the Required Services and preparing FJSs and SFNAs for school districts.
- b) Consultant Organization. State whether Consultant's organization is organized as a California corporation, partnership, sole proprietorship, or some other entity.
- c) Employees. State the number of fulltime employees in Consultant's organization.
- d) Travel Time. State the approximate travel time from Consultant's office to the District office.
- e) Completion of Required Services. Statement of Consultant's availability and ability to timely complete each of the Required Services listed herein.
- f) Sub-Consultants. Identify the sub-consultants, if any, who will or may perform all or part of one or more of the Required Services listed herein.
- g) Principal in Charge. Identify the person and/or persons who will be assigned as principal(s) in charge and assigned to accomplish the Required Services to be provided to the District. Note: Any substitution of such individuals shall be at the approval and sole discretion of the District.
- h) State Agencies Experience
 - i. Currency in Legislation, Administration, and Required Services. The Consultant shall describe over the most recent five years, in chronological order,



Consultant's efforts and participation to remain current with applicable legislative and administrative provisions and procedures applicable to the Required Services requested.

- ii. SAB and OPSC. Describe with particularity and in chronological order Consultant's most recent five years' experience working with State agencies, in particular the State Allocation Board sometimes referred to as the SAB and the Office of Public School Construction sometimes referred to as the OPSC.

- Section 2 - Ability to Deliver

- a) Ability to Perform. Statement of Consultant's ability to perform the required services and to timely deliver the FJS and/or SFNA to the District.
- b) Current Workload. The selected Consultant will be required to prepare and to deliver the FJS and/or SFNA within the time frame set by the District. The District intends to select the Consultant in early 2015 with services to begin July 1, 2015. Consultant should identify current workload that may interfere with Consultant's ability to meet this schedule.

- Section 3 - School Experience

- a) School Experience. Identify each school district to which Consultant provided or is providing the Required Services and is preparing FJSs and/or SFNAs during the most recent five years and for each provide the following information:
 - i. Year
 - ii. Name and location of school district
 - iii. Total number of schools
 - iv. Approximate total number of students
 - v. The Consultant shall include a copy of the FJS prepared for one of the schools identified above.
 - vi. The Consultant shall include a copy of the SFNA prepared for one of the schools identified above.
- b) References. The District reserves the right to contact any of the listed School districts for reference purposes.

- Section 4 - Developers and/or Owners of Real Estate

- a) Developers and/or Real Estate Owners Clients within District
 - i. The Consultant shall identify real estate developers or owners within the District who are clients if related projects may be subject to Alternative School Fees.



- ii. Consultant shall identify real estate developers of or owners who are planning to develop real estate within the District for whom Consultant does work or may do work.
- b) Real Estate Developers Advocate Groups. State in chronological order the Consultant's most recent five years' experience interacting with real estate industry developer advocate groups, in particular:
- i. Builders Industry Association
 - ii. Builders Industry Association, Baldy View Chapter, Rancho Cucamonga, California
- Section 5 - FJS Related Methodology. The Consultant shall describe in detail the method used by Consultant to complete each of the following:
 - a) Performance of the Required Services
 - b) Preparation of the FJS
 - Section 6 - FJS Related Data to be Provided to Consultant by District. The consultant shall provide a numbered itemized list of data required by the Consultant to perform the Required Services and to prepare the FJS.
 - Section 7 - FJS Pro Forma Invoice. The Consultant shall provide an annotated pro forma invoice showing the following for Consultant's performance of the Required Services and delivery and adoption of the FJS:
 - a) Statement of line item fees earned and explanation of each.
 - b) Statement of itemized reimbursable expenses, if any, and the amount of each. If there will be no reimbursable expenses, Consultant shall so state.
 - c) Statement describing the method for charging fees.
 - d) Stated fee schedule for each of the Required Services and the preparation and adoption of the FJS.
 - e) Statement explaining the job description and stating the hourly rate for each employee or sub-consultant related to each line item amount in the pro forma invoice.
 - Section 8 - SFNA Related Methodology. The Consultant shall describe in detail the method used by Consultant to complete each of the following:
 - a) Performance of the Required Services
 - b) Preparation of the SFNA



- Section 9 - SFNA Related Data to be Provided to Consultant by District. The consultant shall provide a numbered itemized list of data required by the Consultant to perform the Required Services and to prepare the SFNA.

- Section 10 - SFNA Pro Forma Invoice. The Consultant shall provide an annotated pro forma invoice showing the following for Consultant's performance of the Required Services and delivery and adoption of the SFNA:
 - a) Statement of line item fees earned and explanation of each.
 - b) Statement of itemized reimbursable expenses, if any, and the amount of each. If there will be no reimbursable expenses, Consultant shall so state.
 - c) Statement describing the method for charging fees.
 - d) Stated fee schedule for each of the Required Services and the preparation and adoption of the SFNA.
 - e) Statement explaining the job description and stating the hourly rate for each employee or sub-consultant related to each line item amount in the pro forma invoice.

- Section 11 - Professional Liability Insurance
 - a) The Consultant shall identify Consultant's professional liability insurance carrier.
 - b) The Consultant shall state the face amount of Consultant's professional liability policy.
 - c) The Consultant shall identify the state in which Consultant's professional liability insurance carrier is domiciled.

- Section 12 - Resumes. The Consultant shall provide the resume of each principal in charge, each employee and each sub-consultant who will perform the Required Services and prepare the FJS and the SFNA.

- Section 13 - Reduction in Fees. The Consultant shall state the reduction in fees, if any, shown in Consultant's proposal if the Consultant is retained to prepare all Required Services and both a FJS and a SFNA for the District.

- Section 14 - Additional Information. The Consultant is encouraged to provide any additional information or description of resources it feels is pertinent to this RFP.
 - 9) Caveat. Proposals that do not comply with the above format maybe deemed non-responsive by the District

PROPOSAL SUBMISSION AND RELATED REQUIREMENTS

- 10) Submitted proposals shall be as follows:



- a) One (1) original unbound proposal with no dividers
- b) Three (3) hard copies of the proposal, each in a three-ring binder with:
 - i. Table of contents
 - ii. Tabbed dividers
 - iii. CD pocket folder
- c) One (1) copy of proposal on a CD (pdf format) inserted in CD pocket folder referred to in the item next above
- d) Each three-ring binder shall be prominently and legibly marked as a response to this RFP, the due date and time, and the name of the Consultant submitting the Proposal.

11) Proposals shall be submitted no later than 2:00p.m. on Tuesday, February 3, 2015 to:

Jennifer Wilhelm, Business Outreach Coordinator
Facilities Management Department
SAN BERNARDINO CITY UNIFIED SCHOOL DISTRICT,
956 West 9th Street
San Bernardino, CA, 92411
Tel: 909-388-6100, Ext. 315
jennifer.wilhelm@sbcusd.k12.ca.us

12) Caveat. Proposals received by the District after due date for the District's receipt of Proposals stated above will be returned to the sender unopened.

13) Proposal Signature. Proposals shall be signed by an authorized individual or officer of the Consultant submitting the Proposal.

14) Withdrawal of Proposals. The Consultant may withdraw Consultant's proposal any time prior to the due date for the District's receipt of Proposals stated above.

15) Information and Communication Control. In order to control information disseminated regarding this RFP, Consultants submitting Proposals are directed not to make personal contact with members of the Board of Education and/or District Administration and/or District consultants with the exception of the District representative identified below:

Jennifer Wilhelm, Business Outreach Coordinator
Facilities Management Department
SAN BERNARDINO CITY UNIFIED SCHOOL DISTRICT
956 West 9th Street
San Bernardino, CA, 92411
Tel: 909-388-6100, Ext. 315
jennifer.wilhelm@sbcusd.k12.ca.us

16) Requests for Information



- a. Consultant's request(s) for information ("RFI") regarding this RFP shall, without exception, be delivered in writing, preferably electronically to the following District representative: Jennifer Wilhelm, Business Outreach Coordinator, jennifer.wilhelm@sbcusd.k12.ca.us
- b. Consultant's RFI shall be legibly identified as follows: *RFI_RFP 166_FJS_SFNA_Consulting Services*

17) District's Acceptance or Rejection of Proposals. The District reserves the right to accept or reject any or all Proposals, to negotiate with any or all responsible Consultants, and to waive any informality or minor non-compliance in the Proposals

18) Consultant's Costs. Consultants submitting Proposals shall be responsible for any and all expenses they may incur in preparing their Proposals.