



Pasadena Unified School District
Bond Program Manager
Request for Statement of Qualifications

Date Issued: December 9, 2011

Date and Time Due: 12:00 p.m. December 28, 2011

I. INTRODUCTION/PURPOSE

The Pasadena Unified School District (the “District”) is soliciting qualified candidates to perform services as Bond Program Manager overseeing its \$350 Million Facilities Bond Construction Program.

The attached Request for Statement of Qualifications (“SOQ”) is intended to select a qualified individual to provide services for indefinite period until either party by virtue of its termination rights under a consulting agreement elects to terminate.

Responses are due by 12:00 p.m., December 28, 2011 and should be mailed to:

Pasadena Unified School District

Attn: David Azcárraga

Chief Facilities Officer

Facilities Office

351 S Hudson Avenue

Pasadena, California 91109

II. GENERAL REQUIREMENTS/SCOPE OF WORK

The selected individual will be expected to provide Program Management services for the District’s Measure TT Bond Program. The scope of work will include, but not be limited to coordination and oversight for all construction projects planned or underway in the District’s Measure TT Bond Funded Program, as well as day-to-day project management of the program. Services will include management and oversight of the District’s Bond Consultant Team, A/E services procurement, scheduling, cost control and reporting, establishment of program standards and procedures, public agency coordination, contractor procurement, construction management, constructability review, claims avoidance, DSA project certification, and overall assistance with the management and coordination of associated services contracts including but not limited to environmental, geotechnical, architectural, engineering, special inspection, materials testing, LEED facilitation and Building Commissioning.

1. RESPONSIBILITIES OF BOND PROGRAM MANAGER

- A. The Bond Program Manager is typically responsible for performing the Program Management scope of work indicated the following categories of work as applicable to the Measure TT Bond Program (“Program”) including, but not limited to:
 1. Coordinate updating applicable long-range facilities master plans from each campus and compiling them into a single Program Facilities Master Plan, to reflect and include new construction, modernization and deferred maintenance for each facility, as requested by the Chief of Facilities.
 2. Planning of projects to be constructed as part of the Program, including interfacing with the District, the public, the Board of Education, regulatory agencies, District staff of various departments, and representatives of outside organizations and stakeholders.
 3. Assist the Chief of Facilities in identifying, recruiting, and selecting, architects, Owner’s Representative, construction managers, and other specialty

consultants, as needed, for the master planning process and for execution of the Measure TT program.

4. Review planned or potential bond Measure TT projects with each affected campus to define and confirm projects.
 5. Planning sequencing and scheduling of construction projects for each campus.
 6. Prepare and present planning reports and status reports to the Chief of Facilities, the independent Citizens' Bond Oversight Committee, the Facilities Subcommittee and Board of Education, as applicable.
 7. Review current budget information and assist the Chief of Facilities in refining its overall Program budget, including expected construction costs, consultant costs, fees, permits, etc. Assist the Chief of Facilities in preparing budgeting and reporting systems to reflect actual expenditures and to reallocate available funds as necessary.
 8. Assist the Chief of Facilities in determining the appropriate project delivery method, such as Design-Bid-Build, CM at Risk, Multiple Prime, Lease Leaseback, etc.
 9. Develop simplified billing, approval, and payment procedures acceptable to the District.
 10. Recommend, and utilize approved, software for submission and tracking submittals, RFIs, CORs, responses, directives and change orders, in addition to coordinating and maintaining schedules that document the sequence and time frame for each project and/or bid package in the Program.
 11. Participate in or chair meetings and/or committees such as construction, site council, independent citizens' Bond Oversight Committee, Facilities Subcommittee, program execution, organizational, etc.
 12. Provide, as the District's representative, the management, supervision, oversight, and evaluation of performance of separately hired Bond Consultant staff.
 13. Assist the Chief of Facilities in the management, supervision, oversight, and evaluation of performance of separately hired architectural/engineering firms.
 14. Assist the Chief of Facilities in the management, supervision, oversight, and evaluation of performance of separately hired specialty consultants, including the IORs.
 15. Assist the Chief of Facilities with design quality assurance, quality assurance, and development of Facilities Construction Standards.
 16. Assist the Chief of Facilities with timing of bond issuances for funding, coordinate program cash flows, and leverage other funding sources (e.g. State or Grants).
 17. Help develop and monitor criteria and metrics for measuring success of projects and the overall program.
- B. Construction Management: The Bond Program Manager is typically responsible for performing the Project or Construction Management scope of work indicated herein and generally shall perform the following categories of work as applicable to the project, as needed or requested, including, but not limited to:
1. Planning construction of projects, including interfacing with the public, school site councils, the Board of Education, and District staff.
 2. Planning sequencing and scheduling of construction projects for each campus.

3. Prepare and present progress reports and status reports to the Chief of Facilities, Facilities Subcommittee, the independent Citizens' Bond Oversight Committee and Board of Education, as applicable.
4. Review current budget information and assist the Chief of Facilities in refining its overall Program budget, including expected construction costs, consultant costs, fees, permits, etc. Assist the Chief of Facilities in preparing budgeting and reporting systems to reflect actual expenditures and to reallocate available funds as necessary.
5. Use standard accounting methods to tabulate, compile and check correctness of all expenditures associated with the Project. Coordinate and reconcile with District's accounting information system.
6. Perform management of Project/Construction Management including design-phase services in conjunction with architecture firms awarded work by the District; assist with bidding; manage the construction contracts; manage the RFI/change order process; close out the projects.
7. Review and approval of invoices and compliance with payment procedures.
8. Utilize approved software for submission and tracking submittals, RFIs, CORs, responses, directives and change orders, in addition to coordinating and maintaining schedules that document the sequence and time frame for each project and/or bid package in the Program.
9. Chair construction meetings and participate in committees such as, steering, Facilities Subcommittee, independent citizens' Bond Oversight Committee, program execution, organizational, etc., as needed.
10. Monitor criteria and metrics for measuring success of projects.

The scope of services set forth in this Request for SOQ represents an outline of the services which the District anticipates the successful individual to perform, and is presented for the primary purpose of allowing the District to compare proposals. The precise scope of services will be directed by the Chief Facilities Officer on an ongoing basis. The individual may suggest changes to the scope of services in order to achieve the District's objectives

Individuals with an expertise in Bond Program Management are encouraged to submit resumes and Statement of Qualification for consideration.

The District expects to hold interviews the week of January 9, 2012.

III. QUALIFICATIONS

To participate, interested individuals must meet the following minimum requirements:

- a. A minimum of ten (10) years prior experience in public school construction
- b. A minimum of seven (7) years school program management in a school bond program of at least \$300 million.
- c. Individual must live within a fifty (50) mile radius of the District.
- d. Individual must have at least seven (7) years experience in managing staff and preparing bid packages, conducting bid walks, and participating in bid openings in a K-12 public works environment, construction management of the work, and project closeouts
- e. Individual must provide evidence of at least seven (7) years experience in managing staff and project estimating, budgeting, scheduling, and cost tracking for public school projects
- f. Individual must provide evidence of managing staff or serving as construction manager for at least fifteen (15) projects of at least Five Million Dollars (\$5M) in the past seven (7) years in the form of a list of projects or other means of documentation acceptable to the District
- g. Individual must provide at least three references documenting satisfactory performance in the past seven (7) years, including comments on interpersonal skills and team dynamics
- h. Ability to provide insurance coverage as documented in attached "Sample Consulting Agreement"
- i. Errors and omissions insurance with limits of not less than \$1,000,000 for each occurrence, and \$1,000,000 aggregate insurance.

The District reserves the right to waive any of these requirements at its sole discretion. The District reserves the right at its sole discretion to reject any and all submittals or to waive any irregularity or informality in any submittal or in the submission process. No submittal, or any portion thereof, may be withdrawn for a period of 60 calendar days after submittal opening. For more information, contact the Chief Facilities Officer, David Azcárraga writing or via email:

azcarraga.david@pusd.us

IV. COMPENSATION

The rate of compensation is \$150.00 per hour at 160 hours per month (not-to-exceed). The successful candidate will be an independent contractor and will provide his own transportation, cellular phone, health benefits, other employee benefits, auto, workers compensation liability and errors and omission insurance, laptop computer, and supplies, unless otherwise provided by the District through mutual agreement.

V. BACKGROUND

The Pasadena Unified School District is comprised of 28 schools in the region drawing from several neighborhoods located in the Cities of Pasadena, Sierra Madre and the Los Angeles County area of Altadena. The schools and educational support programs serve approximately 19,000 students.

In November 2008, the taxpayers of the District passed a \$350,000,000 bond measure to modernize and upgrade its facilities District-wide. In addition to over \$28 Million capital funds already available to the District prior to bond passage, the District expects to raise an additional \$82 Million of funds from a variety of sources for use in its \$460 Million Facilities Master Plan. Please refer to the District's Measure TT website for more information on its Facilities Master Plan, including the December 1, 2009 first annual update in interactive form. Below is a link to the interactive version of the updated Plan on the measurett.org website:

<http://measurett.org/File/FMPBackCoverself.pdf>

A current organization chart of the Facilities Department is provided to applicants for review.

VI. INSTRUCTIONS FOR RESPONDENTS

a. Submittal Deadline

Responses to Request for Qualifications must be received **no later than 12:00 p.m. on December 28, 2011.** Provide **five (5) original copies** of your response to:

**Pasadena Unified School District
Attn: David Azcárraga
Chief Facilities Officer
Facilities Office
351 S Hudson Avenue
Pasadena, CA 91109
(626) 396-5850 x89199
(626) 808-9742**

Submit request in an envelope, sealed, and clearly marked: **Request for Statement of Qualifications – Bond Program Manager**

It is the individual's responsibility alone to ensure that the Request for SOQ is received prior to the hour and date specified in this SOQ. Any proposals received after the hour and date may be deemed ineligible for consideration.

Responses may not be submitted by facsimile or electronic mail

If you have any questions, please contact the Chief Facilities Officer, David Azcárraga at the number and email address listed above.

b. Response Format and Content

Responses are to be prepared in such a way as to provide a straightforward and concise discussion of the individual's ability to satisfy the requirements stated herein. Emphasis should be concentrated on conformance to the SOQ instructions, responsiveness to the SOQ requirements and on completeness and clarity of content.

In order to facilitate evaluation and comparison of responses, it is **mandatory** that all responses be submitted in the format described in this section. Format instructions must be adhered to; all requirements and requests for information in the SOQ must be responded to; all requested data must be supplied. Failure to comply with this requirement may be cause for rejection, at the District's sole discretion.

Answer on 8 ½" X 11" sheets. Assemble your response in the following order. Responses should be numbered in a manner, of the individuals own choosing, that allows for easy reference. Submit five (5) original copies of your response. To conserve resources we ask that responses be duplexed if possible.

1. Cover Letter

Cover Letter – This shall be a brief letter of introduction transmitting the qualifications of the individual and indicating the name, address, telephone number, fax number, and e-mail address, if any, of the person(s) authorized to make representations for the individual and to negotiate final terms and conditions on behalf of the individual.

- Individual Profile/Experience A statement summarizing any pending litigation involving any construction project in the past five (5) years to which individual is a party. Non-disclosure of this item, if later discovered may result, at the owner's discretion, in the disqualification of the applicant

- Evidence of ability to obtain auto, workers compensation liability, and errors and omission insurance coverage. Please refer to Attachment A

3. Personal Qualifications/Resume´

The individual or firm on behalf of the individual shall submit a resume´ and SOQ detailing the individual’s construction background and education, degrees earned and any contractor’s licenses held (include license numbers and State), and disclose any events of a license being suspended or revoked, or any other disciplinary action. **Special emphasis should be made to K-12 public works experiences in the areas defined in Section II, “General Requirements/ Scope of Work”**

4. Conflict of Interest

Prepare a statement, which discloses any past, ongoing, or potential conflicts of interest, which the individual may have as a result of performing the work for this engagement.

VII. RESPONSE REVIEW AND EVALUATION

a. Validation

Responses will be checked for the information required to conform to this Request for SOQ. Absence of required information may be cause for rejection.

b. Evaluation

All responsive proposals shall be reviewed and evaluated by the District in order to determine which individual/firm best meets the District’s needs by demonstrating the competence and professional qualifications necessary for the satisfactory performance of the required services. Responses will be evaluated based on, but not limited to, related experience of the respondents, knowledge of the District, professional qualifications of individuals to be assigned to the District, rates/fees, overall proposal content and references. The District retains the right to interview applicants as part of the selection process. The District is not bound to award a contract to *any* party submitting a response. If the engagement is awarded, the District *expects* to inform the successful applicant/firm by 5:00 p.m. June 4, 2010.

c. Non-Collusion Affidavit

Please complete the mandatory Non-Collusion Affidavit attached to this Request for SOQ and return it with your response.

Upon completion of a review period, the District shall notify those individuals whose

proposals will be considered for further evaluation and negotiation. All individuals so notified may be required to attend interviews or make presentations and shall negotiate in good faith in accordance with direction from the District. Any delay caused by individual's failure to respond to direction from the District may lead to a rejection of the Proposal.

If the District determines, after further evaluation and negotiation to award an agreement, a Consulting Services Agreement shall be sent to the successful individual for signature. No proposal shall be binding on the District until after the Agreement is signed by duly authorized representatives of both the individual/firm and the District and duly approved by the Pasadena Unified School District's Board of Education.

The District will be the sole judge in choosing the individuals who will proceed to the formal interview stage. The District reserves the right to reject any or all responses.

The District shall not be responsible for any explanation or interpretations of the Request for SOQ other than by written addendum delivered to each individual. No oral interpretations of any provision in the Request for SOQ shall be binding upon the District.

This request does not in any way constitute an offer of employment or contract for services.

It may be necessary for the District to request additional information from one or more individuals and the District reserves the right to do so. It is anticipated that this review period will be concluded by 5:00 pm, December 16, 2011.

All proposals must remain effective for sixty (60) days from date of submittal.

All responses to this Request for SOQ shall become the exclusive property of the District.

The District reserves the right to reject any and all responses, wholly or in part, to waive any informality in a response, to request clarification of information from any individual and to effect any agreement deemed by the District to be in its best interest with one or more individuals.

The District will not reimburse individuals for any costs associated with the preparation or submittal of any response.

Nothing contained in this Request for SOQ, the responses, or in the District's acceptance of any response in whole or in part shall oblige the District to complete negotiations with any individual. The District reserves the right to end, in its sole discretion, negotiations with an individual at any time up to the consummation of the transactions arising from this Request for SOQ.

The Pasadena Unified School District is an equal opportunity employer.

**NONCOLLUSION AFFIDAVIT TO BE EXECUTED
BY BIDDER AND SUBMITTED WITH SUBMITTAL**

_____, being first duly sworn, deposes and says that he or she is _____ of the party making the foregoing bid that the bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the bid is genuine and not collusive or sham; that the bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid, and has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or that anyone shall refrain from responding; that the bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the bid are true; and, further, that the bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid.

I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

(Date)

(Signature)

This form *must* be completed and submitted with your response.

Attachment A
Insurance Language

Consultant shall take out and maintain during the period of this Agreement such auto, general liability, workers' compensation, and professional liability insurance as is required to protect Consultant's and the District's interests. Each insurance policy shall name the District, its Board, agents, and employees as an additional insured, and have limits of not less than \$1,000,000 for each occurrence, and \$2,000,000 aggregate insurance.

District warrants that it is self-insured through a public agency pool providing limits in excess of \$10,000,000 and agrees to provide at least thirty (30) days notice to Consultant in the event the District no longer maintains limits in excess of \$10,000,000. Consultant shall maintain the insurance described in the preceding paragraph, naming District as an additional insured, in effect at all times during the term of this Agreement and shall provide the District with certified policy endorsements specifying that District will be notified at least thirty (30) days prior to cancellation, non-renewal or material change of such policies. Consultant shall maintain errors and omissions insurance with limits of not less than \$1,000,000 for each occurrence, and \$1,000,000 aggregate insurance.