

Contract Specialist Strategic Sourcing and Contracts Department P - 858-522-5830 F - 858-522-5885 amains@sandi.net

Site Attendees List – LLB

CONTRACT TITLE:

RFP/Q NO: PROPOSAL DUE DATE: SITE WALK DATE: CONTRACT SPECIALIST:

RFP for Marston Middle School Whole Site Modernization (Preconstruction Services / Lease-Leaseback)
CZ21-0446-42
December 3, 2020 at 2:00 PM
November 6, 2020 at 9:00 AM
Ashley Mains

Contractor	Lic. (A, B, C)	Name/ Attendee	Phone Number	Email	DVBE (N/A)
Balfour Beatty	A, B	Tim Berry	(858) 228-7958	tberry@balfourbeattyus. com	-
C.W. Driver	В	Samuel Myovich	(619) 818-1867	smyovich@cwdriver. com	-
McCarthy Holding Companies	В	David Miles	(949) 514-2321	dmiles@mccarthy.com	-
Soltek Pacific Construction	A, B	Kyle Kipp	(619) 520-8960	kkipp@soltekpacific. com	-
Sundt Construction	В	Mike Casey	(858) 229-7790	mjcasey@sundt.com	-
Swinerton	А, В	Alex Kozlowski	(714) 833-4613	akozlowski@swinerton. com	-
Turner Construction Co.	А, В	Elias Espino	(619) 750-8383	eespino@tcco.com	-
Preman Roofing	B, C39	David Rodriguez	(619) 276-1700	David@premanroofing. com	-
Renew Age Energy Solutions	B, C10, C36	Anthony Flores	(424) 258-7716	Anthony@renewage. com	-
Southwest Regional Council of Carpenters	-	Jorge Viramontes		Jviramontes@sw carpenters.org	-
Labor Union 45	C39	Edwin Guzman	(619) 734-8449	Edwing@roofers45.org	-



Site Visit Instructions – LLB Request for Sealed Proposals (RFP)

CONTRACT TITLE: RFP/Q NO: OPENING DATE: BOARD OF EDUCATION: CONTRACT SPECIALIST: Preconstruction Services at Marston MS (Lease-Leaseback) CZ21-0446-42 December 3, 2020 at 2:00 PM February 9, 2021 Ashley Mains

This is a mandatory Pre-Proposal Meeting and Site Visit for all LLB Pool E; if you have not signed in you will not be able to submit a Proposal.

RFP SCHEDULE				
Event	Time / Date / Deadline			
District Issues RFP and Contract Documents Available digitally only on PlanWell (<i>Printed documents are available only by request via email to <u>mhatem@sandi.net</u>)</i>	November 3, 2020			
Mandatory Pre-Proposal Conference and Site Walk	November 6, 2020 at 2:00 PM			
Deadline for Contractors to submit RFI questions regarding this RFP	November 12, 2020 at 2:00 PM			
District to respond to Contractors' questions regarding this RFP	November 30, 2020			
Deadline for Contractors to submit Proposals	December 3, 2020 at 2:00 PM			
District Negotiations with Contractor	December 16, 2020 – January 8, 2021			
District Board approves successful Contractor	February 9, 2021			

Under Public Contract Code 3400, the District has made a finding that the following particular materials, products, things, or services are designated by specific brand or trade name in order to match other products in use on the particular public improvement either completed or in the course of completion:

- 03 30 00 Cast-In-Place Concrete
- 27 41 16 Audio Visual Infrastructure
- 28 31 11 Digital Addressable Fire Alarm System
- 32 84 00 Irrigation

ANTICIPATED DURATION OF PROJECT:				
Marston MS Preconstruction Services	15 months			
Marston MS Construction Services	24 months			

1. LICENSE REQUIREMENTS: The District requires that Contractors possess any of the following classification(s) of California Contractors License at the time that the Contract for Work is awarded: **B**.



2. REQUESTS FOR INFORMATION:

- a. Today—during the pre-proposal meeting and site visit, address your questions to the architect.
- b. After the pre-proposal meeting and site visit—address questions in writing to Ashley Mains (<u>amains@sandi.net</u>) and copy Maureen Hatem (<u>mhatem@sandi.net</u>). Do not contact the project manager.
- c. The deadline for contractors to submit questions regarding this RFP is November 12, 2020 at 2:00 p.m.
- d. The deadline for the District to respond to contractors' questions regarding this RFP is November 30, 2020.
- 3. PROPOSALS SUBMISSION: Contractors interested in submitting a Proposal must go to <u>https://www.planetbids.com/portal/portal.cfm?CompanyID=43764</u> then search under "Bid Opportunities" for "Invitation number" CZ21-0446-42 Preconstruction Services for Marston Middle School Whole Site Modernization. For new vendors, register under "New Vendor Registration".

Proposal Due Date Submit on Planet Bids before 2:00 p.m. on December 3, 2020:		Partial	Completed
RFP Response	One (1) electronic copy in PDF with bookmarks (<i>Note:</i> 50 MB size limit)		~
Attachment No. 3	Contractor Statement of EBE Commitment		✓
Attachment No. 4	GMP and Other Cost Components		~
Attachment No. 5	Schedule of Values (For District Reference Only. Attachment No. 5 will not be scored during proposal evaluation.)		~

- 3. PLANS, SPECIFICATIONS & RFP DOCUMENTS: The documents are available in three formats: online from PlanWell, CD, or hard copy. Online documents are available immediately for download on PlanWell through Crisp Imaging. Go to www.crispimg.com, click on the PlanWell button, click on PUBLIC PLANROOM, search for SDUSD projects. They will be available for pickup at Crisp Imaging, 8375 Camino Santa Fe, Unit B, San Diego, CA 92121 (858-535-0607) within three (3) days of emailing your request. Hard copy documents are available for a refundable payment of Five-Hundred Dollars (\$500) per set; CD's are available for a non-refundable charge of \$50. HARD COPY PLANS AND SPECIFICATIONS WILL ONLY BE PRINTED, IF REQUESTED. EMAIL MAUREEN HATEM AT MHATEM@SANDI.NET TO REQUEST THE PLANS AND SPECS. Payments shall be made by check payable to San Diego Unified School District. Refunds will be processed by the District only if the documents, including all addenda, are returned intact and in good order to Crisp Imaging within ten (10) days of submitting a proposal.
- 4. SENATE BILL (SB) 854 REQUIREMENTS: Pursuant to Labor Code §1773, the Director of the Department of Industrial Relations (DIR) of the State of California has determined the generally prevailing rates of wages in the locality in which the Work is to be performed. To perform work on this project, Contractor and all of its subcontractors are required to be registered as a public works contractors with the Department of Industrial Relations (DIR) pursuant to Labor Code §1725.5. All contractors' registration must remain active throughout the term of the agreement. The rates are set forth in a schedule which may be found on the DIR website http://www.dir.ca.gov. Any Contractor to which a contract is awarded must pay the prevailing rates, post copies thereof at the job site, provide payroll records when required, and otherwise comply with applicable provisions of state law. Failure of the prime contractor to list their subcontractors DIR Registration Number on the Subcontractors List

Strategic Sourcing and Contracts, 2351 Cardinal Lane, Bldg. M, San Diego, CA 92123-3743 www.sandi.net



at time of submittal of proposal may result in rejection of their proposal as non-responsive or incomplete.

Refer to the following DIR Website for further information: <u>www.dir.ca.gov/Public-Works/PublicWorks.html</u>

- 5. PROJECT STABILIZATION AGREEMENT (PSA): This project is subject to the Project Stabilization Agreement (PSA) adopted by the Board of Education on July 28, 2009 and as subsequently amended. The complete agreement is available for viewing and downloading at www.sandiegounified.org/node/1097. The successful Contractor (and all Subcontractors) will be required to execute a PSA Letter of Assent (LOA), whereby Contractor and Subcontractors agree to conform to all terms and conditions set forth in the PSA.
- 6. **PREVAILING WAGES:** Prevailing wage requirements apply to all public works projects and must be followed per the General Conditions of this Lease-Leaseback Agreement.
- 7. DISABLED VETERAN BUSINESS ENTERPRISE PARTICIPATION PROGRAM: Pursuant to Resolution In Support of Service Disabled Veterans Owned Businesses (SDVOB) and Disabled Veteran Business Enterprises (DVBE) approved on May 10, 2011 by the Board of Education, the Bidder is required to satisfy a minimum DVBE participation percentage of at least three percent (3%) for all construction projects. In order to be responsive, the successful Contractor must meet or exceed 3% DVBE participation either directly through the General Contractor or a first tier subcontractor or supplier as evidenced by DVBE/SDVOB Contractor Declaration and Contractor's DVBE Statement forms submitted at time of proposal. The failure of any Contractor to strictly comply with the District's DVBE Participation Program Policy will result in rejection of a Contractor's Proposal for nonresponsiveness or incompleteness.
- 8. The District reserves the right to reject any and all proposals and to waive any irregularities or informalities in any proposal. No contractor may withdraw his bid for a period of 150 days after the date set for the opening of proposals. For more information please email Ashley Mains at <u>amains@sandi.net</u>.



LEASE-LEASEBACK & SUBCONTRACTING OPPORTUNITIES

San Diego Unified is now using the Lease-Leaseback (LLB) delivery method for large and complex projects ranging in value from \$7 to \$110 million. LLB is a method that streamlines complex construction projects and frees up funding. It allows school districts to lease a school site to a contractor for a nominal fee. The contractor then builds the project and leases the property back to the district for a set period of time, after which the property's ownership reverts back to the district. LLB is more like a design-build delivery method, which differs from the district's more commonly used design-bid-build delivery method.

The district currently has plans to issue contracts for more than 70 LLB projects. The projects have been sorted by size into groups and are being bid in periodic rounds. Pools of prequalified Prime contractors were created to meet the increased workload. The solicitations to develop the Prime pools are bid via public process, as required. Each round of projects is bid through solicitations only to those contractors in the relevant pool of Prime contractors. Some contractors are in more than one pool.

What Subcontractors Need to Know

Understanding the LLB groups, rounds, and pools is mostly unnecessary for subcontractors and EBEs. The district will bid each project within a pool of contractors and award to the winning Prime. The Primes then take ownership of the project and have their own site walks, bidding processes, and due dates. It is immensely important for subcontractors to develop relationships with each of the contractors in the Prime pools (see list at left).

In addition to developing relationships with the Primes, here are some other things that subcontractors and EBEs can do to be poised to bid:

To-Do List

- 1. Get on the SDUSD database
- 2. Get prequalified with SDUSD
- 3. Get prequalified with the LLB Prime contractors
- 4. Apply for relevant EBE certifications
- 5. Upgrade to SB-PW certification if your company outgrew its small business designation (see back page)

2020 OUTREACH GOALS

Overall EBE Goal	50%
Disabled Veteran	5%
Minority Business	8%
Woman-Owned	7%
Small Business	40%

EBEs & BEST VALUE

One of the many benefits of LLB is that Primes may award subcontracts based on best value. With San Diego Unified's robust EBE goals, Primes and large subs are motivated to engage more EBEs on each project. In fact, bids are being packaged to maximize EBE participation at all tiers. Some Primes even consider EBE participation a best value factor.

San Diego Unified School District's Facilities Planning and Construction Department has a robust Business Outreach Program designed to engage Emerging Business Enterprises (EBEs) and encourage participation in its construction projects. EBE is an umbrella term that includes woman-, minority-, disabled veteran-owned, and small business enterprises.

Capital improvement bond funds Propositions S, Z, and Measure YY jointly provide about \$8.4 billion to design and construct clean, safe, environmentally friendly facilities that encourage successful teaching and learning at schools throughout the district.

Tens of millions of dollars are spent with EBEs each year. Don't miss out on these opportunities!

LEASE-LEASEBACK PRIME CONTRACTORS

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- 1. Balfour Beatty Construction
- 2. Barnhart-Reese Construction
- 3. C.W. Driver
- 4. McCarthy Building Companies
- 5. Nexgen Building Group
- 6. PCL Construction Services
- 7. Soltek Pacific Construction Company
- 8. Sundt Construction
- 9. Swinerton Builders
- 10. Turner Construction Company

DID YOU KNOW?

A new small business certification was launched by the state of California in 2019. The new Small Business for the purpose of Public Works (SB-PW) certification allows larger subcontractors to maintain small business (SB) designation.

Take a look at the table below. If you outgrew your small business designation but qualify under the new thresholds for SB-PW, this is great news. Getting your SB-PW certification will make you more much attractive to LLB Primes. Learn more here: <u>www.dgs.ca/gov/pd/Programs/OSDS/GetCertified.aspx</u>.

Thresholds	SB Certification	SB-PW Certification	
Gross Annual Receipts Cap (last 3 years averaged)	\$15,000,000	\$36,000,000	
Maximum employee count (most recent 4 quarters)	100	200	

PROJECT STABILIZATION AGREEMENT

San Diego Unified's PSA applies to projects exceeding \$1 million. Therefore, all LLB projects are subject to the agreement. To learn more about the PSA, get a copy, or meet one-on-one with the PSA Coordinator, contact Ivory Anderson: <u>ianderson1@sandi.net</u>.

If you would like to schedule a PSA training session for your office or subcontractors, contact Karen Linehan: *klinehan@sandi.net*.

CONNECT WITH LLB PRIMES

Developing active relationships with each Prime's Small Business Liaison Officer (SBLO) and getting prequalified will ensure your company is notified of all applicable LLB opportunities.

Balfour Beatty Construction Annie del Rio - Small Business Liaison Officer	
Email: adelrio@balfourbeattyus.com	
Prequalification:	
https://prequal.balfourbeattyus.com/createuser	

Barnhart-Reese Construction Tami Barnhart Reese - Small Business Liaison Officer Email: TReese@BarnhartReese.com Prequalification: dlozano@barnhartreese.com

C. W. Driver Leanne Loera - Small Business Liaison Officer Email: Iloera@cwdriver.com Prequalification: www.cwdriver.com/build-with-us

McCarthy Building Companies Amanda Corbet - Small Business Liaison Officer Email: acorbet@mccarthy.com Prequalification: www.mccarthy.com/subcontractors

Turner Construction Company Vera Howell - Small Business Liaison Officer Email: vhowell@tcco.com Prequalification: www.turnerconstruction.com/sub-contractors Nexgen Building Group Shaly Guizzetti - Small Business Liaison Officer Email: Shaly@NexgenBuilding.com Prequalification: http://bit.ly/Nexgen-Prequal

PCL Construction Services Email: DiverseBusinessUS@pcl.com Prequalification: https://www.pcl.com/partnersin-building/pages/subcontractor-and-supplierregistration.aspx

Soltek Pacific Ana Aispuro-Rebelin - Small Business Liaison Officer Email: sblo@soltekpacific.com Prequalification: http://www.soltekpacific.com/small-business/

Sundt Construction DeAnna Andrews - Small Business Liaison Officer Email: dmandrews@sundt.com Prequalification: http://www.subqual-llc.com/ prequal/forms.jsp

All non-subcontractor supplies and services: http://subcontractor.sundt.com/subcontractor/ registration.jsp

Swinerton Builders Kim Patton - Small Business Liaison Officer Email: kpatton@swinerton.com Prequalification: www.swinerton.com/ subcontractors/subcontractor-prequal

SDUSD PREQUALIFICATION

All subcontractors are required to be prequalified with San Diego Unified for LLB projects in order to bid. LLB prequalification packages can be downloaded here:

<u>https://www.sandiegounified.org/</u> <u>contractor-prequalification</u>. Email: <u>prequal@sandi.net</u> with any questions. In addition, each Prime contractor may also have their own prequalification requirements.

Prequalification for LLB projects

Category	Prequal	No Prequal		
MEP*	Х			
Non-MEP	Х			
Suppliers		Х		
Manufacturers		х		
Equipment Providers		х		
* C-4 C-7 C-10 C-16 C-20 C-24 C-26 C-28				

* C-4, C-7, C-10, C-16, C-20, C-34, C-36, C-38, C-42, C-43, C-46

CONTACT INFORMATION

Sidney Hucklebridge-Key LLB Outreach Coordinator shucklebridge@sandi.net 619-471-4960

Karen Linehan Outreach Program Manager <u>klinehan@sandi.net</u>

KEY LINKS

Business Outreach www.sandiegounified.org/businessoutreach

Planroom (view plans by trade) www.crispimg.com Click the PlanWell tab, click GO under

Public Planroom, type "SDUSD" in Find field, click on project name.

Karen's LinkedIn Page www.linkedin.com/in/karenlinehan

DATABASE http://tinyurl.com/sdusd-nform

BUSINESS OUTREACH PROGRAM Facilities Planning & Construction | 4860 Ruffner Street, Room 9, San Diego, CA 92111-1522 klinehan@sandi.net | abanuelos@sandi.net | 858.573.5852 | www.sandiegounified.org/business-outreach



Project Stabilization Agreement (PSA) Things You Should Know

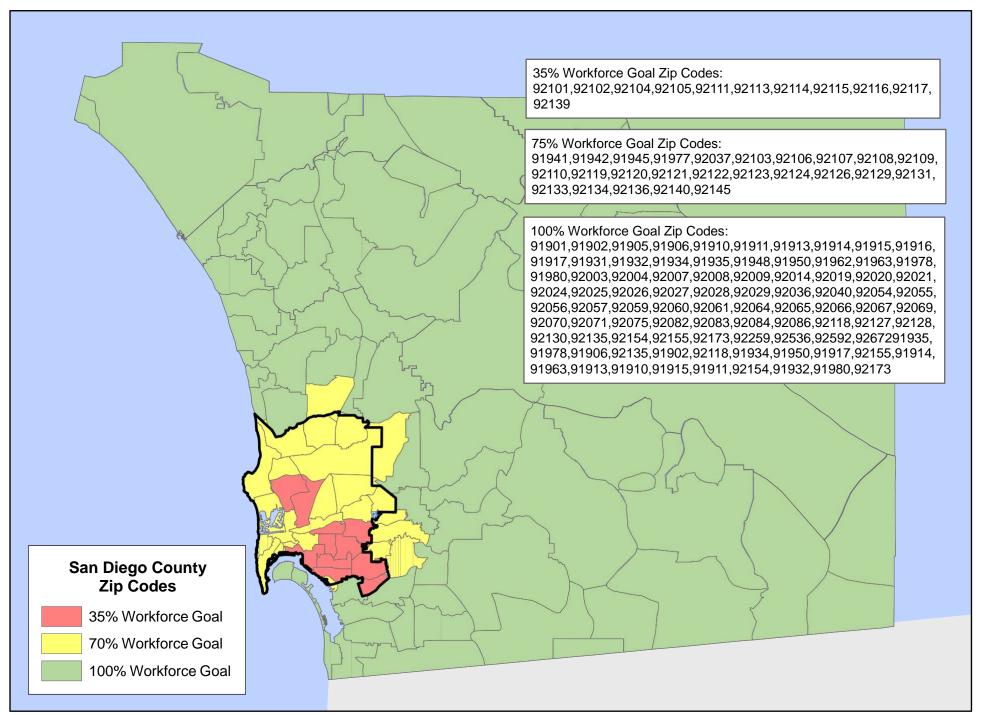
- The successful prime Contractor and all subcontractors, regardless of tier, must sign a Letter of Assent binding them to the provisions of the PSA for this PSA-covered project prior to commencement of work.
- Contractors are bound to the terms of the PSA only for the life of the PSA-covered project.
- The successful prime Contractor must attend a pre-job labor conference prior to the commencement of work.
- Neither Contractors nor their employees are required to join a union to work on the PSA-covered project. However, "core employees" are required to register with the union hiring hall representing the craft work they will perform.
- Unless they have signed a separate collective bargaining agreement, the prime Contractor and all subcontractors, regardless of tier, must utilize the union hiring hall for referral of craft employees.
- SDUSD has set certain goals for employment of District residents on PSAcovered projects. To the extent possible, Contractors should follow these goals when assigning workers to PSA-covered projects.
- All state and federal laws pertaining to Labor Compliance apply to PSA-covered projects. No provision of the PSA can overrule these laws.
- Unless otherwise determined by the Project Labor Coordinator, the employee fringe benefit portion of the employee prevailing wage rate must be contributed to the applicable trust fund on behalf of the employee.
- Complete copies of the Project Stabilization Agreement may be found on the SDUSD website: <u>www.sandi.net/props</u>

Project Labor Coordinator - Key Contacts:

George A. Harris III <u>gharris@sandi.net</u> 858-637-6269 Ivory Anderson <u>ianderson1@sandi.net</u> 916-835-7349

See reverse for ZIP code map

San Diego Unified School District Project Stabilization Agreement Workforce Referral Map



Prepared by the Inst. Facilities Planning Dept. 01/10

DISABLED VETERAN BUSINESS PARTICIPATION TIP SHEET SAN DIEGO UNIFIED

WHAT YOU NEED TO KNOW SDUSD requires 3% DVB participation on all publicly bid construction contracts.*

- 3% DVB participation required
- "Good Faith Effort" no longer applies
- DVB prime contractors meet the requirement by default
- State of California certifications are required for DVBEs
- Federal verification letters are required for SDVOSBs

NON-DVB PRIME CONTRACTORS DO THE DUE DILIGENCE:

Definitions				
CVE	Center for Veterans Enterprise			
DVB	Disabled Veteran Business			
DVBE (State)	Disabled Veteran Business Enterprise			
SDVOSB (Federal)	Service Disabled Veteran-Owned Small Business Enterprise			
VA	Department of Veterans Affairs			
VIP	Vendor Information Pages (federal SDVOSB database)			

Props. S&Z

PLALITY NEIGHBORHOO

Confirm valid DVBE/SDVOSB certification

DVBE:

Ask contractor for DVBE Certification; go to https://caleprocure.ca.gov/ pages/PublicSearch/suppliersearch.aspx, input business name or supplier number

SDVOSB:

Ask contractor for CVE Letter: be sure it is current and valid

Check the VIP at www.vip.VetBiz.va.gov for SDVOB verification

2

Complete DVBE Bidder Declaration, include with bid

Collect all materials and include with bid if possible

*The DVBE requirement can be met through participation of contractors, suppliers, manufacturers and equipment providers.

DVB SUBCONTRACTORS GET CERTIFIED/VERIFIED:

 Start the DVBE certification process at https://caleprocure.ca.gov/pages/CertificationProcess/sbdvbe-1.aspx

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- Start the SDVOSB verification process at www.vetbiz.gov
- DVBE eligibility is a two-year period and must be renewed annually; SDVOSB eligibility is a three-year period
- Eligibility must be current at time of bid
- It is your responsibility to apply for and maintain DVBE/SDVOSB eligibility status

DVB PRIME CONTRACTORS

- Maintain eligibility
- Do not "need" DVB subs, but it is encouraged
- Complete DVBE Bidder Declaration, include with bid
- Submit proof of current and valid certification/verification with bid

RESOURCES

For assistance finding Disabled Veteran Business contractors, suppliers, manufacturers and equipment providers and/or confirming DVBE/SDVOSB status, contact the following:

> SDUSD Business Outreach Department Karen Linehan, Outreach Program Manager klinehan@sandi.net

Alma D. Bañuelos, Business Outreach Coordinator 858-573-5852 | abanuelos@sandi.net

The Elite Service Disabled Veteran-Owned Business (SDVOB) Network, San Diego Chapter: www.elitesdvob.org

U.S. Veteran Business Alliance: www.gousvba.org

Veterans In Business (VIB) Network: www.vibnetwork.org

DVBE and SDVOSB eligibility must be current at time of bid.

Or None

No

DVBE/SDVOB CONTRACTOR DECLARATION (EXAMPLE OF COMPLETED FORM AT *TIME OF PROPOSAL*)

1. Prime Bidder Information:

- a. Identify current California certification(s) (MBE, SBE, WBE, DVBE, SDVOB)_____
- b. Will DVBE/SDVOB subcontractors or suppliers be used for this contract?
- c. If you answered NO, skip to 4. CERTIFICATION below.

2. Subcontractor/Supplier Information:

a. If you answered YES to 1.b. above, have you verified whether your DVBE/SDVOB subcontractors/suppliers have current and valid CA DVBE certification or SDVOB Center for Veterans Enterprise (CVE) Verification Letters? Yes_____ No_____

Yes

- b. If you answered YES, list your DVBE/SDVOB firms in 3. DVBE/SDVOB SUBCONTRACTOR/SUPPLIERS LISTING below.
- c. You must list only qualified DVBE's possessing a current and valid certification or SDVOB possessing a current and valid verification letter from the CVE. Any listed subcontractors/suppliers found to not have either a certification or verification letter will render your bid non-responsive. No exceptions.
- 3. DVBE/SDVOB Subcontractor/Supplier Listing: (COMPLETE ALL SHADED COLUMNS AT TIME OF PROPOSAL AND/OR GMP SUBMITTAL as applicable. Attach additional page(s) if necessary.) Contractor shall submit within 24 hours of Proposal opening due date and/ or GMP Submittal(s) a COMPLETE DVBE/SDVOB CONTRACTOR DECLARATION with ALL columns complete, along with the completed Contractor's DVBE Statement.

Subcontractor/Supplier Name, Contact Person, Phone and Fax number	Subcontractor/Supplier Address and E-mail Address	CA DVBE Certification # or SDVOB Verification Letter Date	Work to be Performed or Supplies Provided for this Contract (ie UNSPSC# 39131706 – Electrical Conduit)	Corresponding Subcontract/Supplier Purchase Order Value (\$)	Corresponding % of proposal price
ABC Electrical Company		21233			2.2%
SOS Supply Company		40564			1%

4. **CERTIFICATION:** By signing this Declaration, I certify under penalty of perjury that the information provided is true and correct.

Printed name:

Signature:

Date: