



**Request for Qualifications
for the Development and Operation of a
Workforce Housing Facility**

**Monterey Peninsula Unified School District
700 Pacific St.
Monterey, CA 93942
831-645-1200**

Request for Qualification Issued:	June 3, 2019
Deadline for Submittal of Response:	June 28, 2019 at 3:00 PM

1. NOTICE OF REQUEST FOR PROPOSALS

The Monterey Peninsula Unified School District (“District”) is requesting qualifications from qualified firms for the District’s Workforce Housing Facility Project (“Project”). The selected firm will provide comprehensive and turnkey design, build, and operation services regarding the Project, including development and planning, design, permitting and construction. Once the Project is completed, the District will assume ownership of the facility and the selected firm will, pursuant to a 30-year lease agreement, operate and maintain the facility.

The intent of the District in developing this Request for Qualifications (“RFQ”) and the Request for Proposals (“RFP”), which will be issued subsequently, is to encourage firms to use their expertise to provide innovative solutions for the Project. Responding to this RFQ is mandatory for the receipt of the RFP. Based on its evaluation of each respondent’s qualifications, the District expects to short-list the top ranked firms. Only those firms that are shortlisted will receive the RFP.

2. PROJECT INFORMATION

The Monterey Peninsula School District includes the cities of Monterey, Sand City, Del Rey Oaks, Seaside, and Marina and has approximately 10,000 students and over 1,000 employees. The Board of Education has identified recruitment and retention of high quality, diverse staff a Board Goal and in order to support this goal addressing the high cost of living, particularly the lack of affordable housing, is imperative to achieving long term success.

MPUSD has identified 5 sites for potential development of employee housing. The sites include:

- The field area at Marina Del Mar Child Development Center located at 3066 Lake Drive, Marina
- The area in front of Seaside Middle School located at 999 Coe Ave, Seaside
- The field area at Central Coast High School located at 200 Coe Ave, Seaside
- The field area at Del Rey Woods Elementary located at 1281 Plumas Ave, Seaside
- Del Monte Elementary located at 222 Casa Verde Way, Monterey

The district is looking to develop a mix of rental and for sale units for employees. Depending on the site, units can be rental only, a mix of rental and for sale, or for sale only.

3. PROJECT FINANCING

In accordance with the provisions of California Government Code section 5956 et seq., the selected firm will provide the necessary financing for the Project.

4. DESCRIPTION OF SERVICES

The District anticipates the Project will require the following services from the selected firm/development team:

- i. Project Planning. The development team will be responsible for the initial study, development, and planning of a proposed facility.
- ii. Design & Construction. The development team will be responsible for the design and construction of the District-approved facility, including obtaining all permits, fees, and approvals necessary for construction of the facility. This project will be subject to prevailing wage.
- iii. Financing. The development team will be responsible for providing funding for the Project.
- iv. Facility Management Services. The development team, pursuant to a 30-60 year lease with the District, will be responsible for management, operation, maintenance and repair of the facility and associated infrastructure.
- v. Government & Community Relations. The development team will work collaboratively with the District to ensure appropriate outreach and engagement with the neighborhood and relevant stakeholders, as well as with local government officials and agencies.
- vi. Insurance. The development team will be responsible for obtaining insurance as required by the District.
- vii. Taxes and Fees. The development team will be responsible for paying all taxes and fees, including any possessory interest taxes.
- viii. Indemnification. The development team will agree to defend, indemnify and hold harmless the District from any and all activities and liabilities associated with the Project.

The proposed description of services may be further refined by the District during the RFP phase.

5. RESPONSES TO THIS REQUEST FOR QUALIFICATIONS

All responses shall, as a minimum, contain the following information:

5.1 Experience and Qualifications of the Firm

- i. Briefly describe your firm's qualifications for performing the work described herein for projects similar in size, scope, and complexity level in the past five (5) years. If multiple firms comprise the development team, identify the principle firm and explain the function of each firm for this Project and what the legal authority is (i.e. joint venture, etc.).
- ii. Briefly describe the firm's experience with design-build. Please specify and residential projects the firm has completed.
- iii. Briefly describe the firm's experience with operating and maintaining a residential facility.
- iv. Briefly describe the firm's experience with entitlements, permitting, and construction on the Monterey Peninsula.

5.2 Experience and Qualifications of the Project Team

- i. Indicate the role each team member will play in the Project. Emphasis should be placed on the experience of the Project Manager, as well as Design and

Construction Managers (if different from the Project Manager) for similar projects.

- ii. Provide an organizational chart that illustrates the role of each primary project team member.
- iii. Provide resumes describing the qualifications of the project team members who will be working on this project. The District is interested in similar type projects completed by these team members within the past five (5) years.

5.3 Project Approach

Provide a comprehensive narrative of the specific approach your firm will take for the Project. Demonstrate your ability to create a development team which can successfully undertake and complete the entirety of this Project by providing specific examples of past projects. Describe the Firm's approach to minimizing unexpected costs and scheduling delays.

5.4 References

Provide a minimum of four (4) references, and include the following information regarding each reference:

- i. Description of the project applicable to the identified reference;
- ii. Team members who worked on the project (specify role of each member);
- iii. Date of award;
- iv. Anticipated date of completion;
- v. Actual date of completion;
- vi. Project budget;
- vii. Actual project cost; and
- viii. Reference's (and primary contact person's) name, address, and phone number.

5.5 Financial Information

The respondent shall provide full disclosure information regarding its financial strength and, if applicable, the financial strength of a corporation willing to guarantee the respondent's obligations under a contract eventually executed. As a minimum, the respondent shall submit:

- i. Audited financial statements for the past three (3) fiscal years, including income statements, balance sheets, and a statement of changes in financial position.
- ii. Copies of the latest quarterly financial reports for the prior three (3) years.
- iii. A statement regarding any material changes in the mode of conducting business, bankruptcy proceedings, and mergers or acquisitions for the past

- three (3) years, as well as any disclosure of any potential mergers or acquisitions.
- iv. A notarized statement from an admitted surety insurer (approved by the California Department of Insurance and authorized to issue bonds in the State of California) which states the applicant's current bonding capacity.

If the response is being submitted by a consortium, a joint venture, or a partnership, the response shall identify the parties and relationships. Each member of such consortium, joint venture, or partnership shall provide full disclosure information regarding their financial strength as specified in this section for individual respondents.

5.6 Comments on Project Concepts

Respondents may also provide comments on Project concepts. While such comments will not be used as a basis for evaluating responses to this RFQ, the District will review comments and may incorporate any or all information or suggestions reasonable in the subsequent RFP and Agreement. Comments should be limited to items that respondents believe will enhance the solicitation process and allow for cost-competitive and creative proposals.

6. QUALIFICATIONS CRITERIA AND RANKING

Responses will be reviewed and evaluated by the District. The most highly ranked respondents will be issued an RFP and will be invited to submit proposals to the District for further consideration. Responses to this RFQ will be ranked based upon the evaluation of the following criteria:

- i. Respondent's experience with the planning, development, design, construction, and operation of projects which are similar in nature and scope to the District's proposed project (20%);
- ii. Respondent's experience with design-build project delivery approach, particularly for residential facilities built in the Monterey Peninsula Region (20%);
- iii. Respondent's past performance on similar projects (20%);
- iv. Respondent's project team experience (20%);
- v. Respondent's financial strength (20%).

This RFQ does not commit the District to award a contract or to pay any costs incurred in the preparation of a response. The District reserves the right to accept all or part of any response, to waive any irregularities, and to cancel in part or in its entirety this RFQ. The District further reserves the right to negotiate changes in and to accept the response that it considers to be in the best interest of the District.

7. SUBMITTAL REQUIREMENTS AND INQUIRIES

Qualified firms are invited to submit an original copy, two (2) additional hard copies, and one (1) electronic copy in PDF format of its response to this RFQ by **no later than June 28th, 2019 at 3pm** to the following address:

Monterey Peninsula Unified School District
Superintendent's Office
700 Pacific St.
Monterey, CA 93940
Attention: Denise Muñoz, Assistant to the Superintendent
Email address (for submission of electronic copy):pkdiffenbaugh@mpusd.net

All copies of the response identified in this section must be received by the deadline set forth herein. Responses not received by the deadline will not be opened or reviewed.

Any questions concerning this RFQ may be directed to PK Diffenbaugh, Superintendent, telephone: 831-645-1204. Questions must be received no later than June 19, 2019, at 5:00 p.m.

8. AUTHORITY

This request for qualification, and any ensuing procurement, is pursuant to the provisions of Government Code section 5956 et seq., through which the District will form a public-private partnership with the successful firm.