REQUEST FOR PROPOSALS

PROFESSIONAL SERVICES
Development Fee Justification Studies
School Facility Needs Analysis

RFP-2019

Request for Proposals Issued:         September 10, 2019
Deadline for Questions:               September 17, 2019
Addenda Issued:                       September 19, 2019
Proposals Due:                        September 24, 2019
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The Natomas Unified School District (NUSD) is pleased to issue this Request for Proposals (RFP) for Professional Services in preparation of Development Fee Justification Studies and School Facility Needs Analysis. The preparation of a Residential/Commercial Developer Fee Justification Study is required by the District to serve as a basis for justifying Level 1 Fees, pursuant to Education Code Section 17620, to be levied on new residential construction and on new commercial/industrial construction. The preparation of a School Facility Needs Analysis (SFNA) is also required for determination of Level 2 Developer Fees in accordance with Government Code 65995.5 - 65995.7.

BACKGROUND
The Natomas Unified School District is located in the northwestern portion of Sacramento County approximately four miles north of the downtown area of the City of Sacramento. The District serves a population of approximately 74,500. The District’s projected student population (including charters) for the 2019-20 school year is estimated at 15,200. The District’s enrollment has steadily increased for the last 10 years.

The District currently operates four elementary schools (TK-5), one TK-7 school, four TK-8 schools, one middle school, two high schools, and one continuation high school. The District also has one dependent charter school and four independent charter schools.

The District last raised its developer impact fee rates in March 2019. Level II residential rates are charged at $4.55 per square foot, commercial rates are $0.61 per square foot.
The contract will be an initial one-year agreement, which is annually renewable at the sole option of the NUSD Governing Board for up to four (4) additional one-year periods.

Unless extended by an amendment to the RFP, the due date and time for receipt of proposal is on or before **September 24, 2019, at 4:00 p.m.** Please submit one original and four (4) printed copies of your proposal in a sealed envelope to:

**Jennifer Mellor, Project Manager**  
Natomas Unified School District  
1901 Arena Blvd.  
Sacramento, CA 95834

Firms are strongly encouraged to submit any comments or exceptions to the RFP materials including the anticipated basis of the agreement, as described above.

Proposal receipt is required on or before **September 24, 2019 at 4:00 p.m.** If the District decides to request an interview, the interviews will be scheduled on a day during the week of September 23, 2019 through September 26, 2019. The District plans to submit its recommendation to the Board on October 30, 2019.

Please make your proposal valid for District acceptance through December 31, 2019.

Please direct any written inquiries via email to jmellor@natomasunified.org by September 17, 2019. The subject of the email must read RFP 2019 Developer Fee Studies. General information regarding NUSD is available via the Internet at www.natomasunified.org. The addendum will be available on September 19, 2019 on the District webpage. We appreciate your consideration and we look forward to receiving an excellent and competitive proposal from your firm.

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**RFPs Due:** September 24, 2019, 4:00 pm  
**Last day for Questions:** September 17, 2019, 4:00 pm  
**Addenda Issued:** September 19, 2019  
**Interviews Conducted:** September 30, October 1  
**Firm Selection:** October 2, 2019  
**Board Approval of Agreement:** October 30, 2019
INSTRUCTIONS AND CONDITIONS

1. DEFINITIONS:
   a. As used herein, “RFP” means this Request for Proposal, RFP 2019-Developer Fee Studies
   b. As used herein, “District” or “NUSD” means the Natomas Unified School District
   c. As used herein, “Offeror” means the Firm or Contractor submitting a Proposal
   d. As used herein, “Offer” means the Proposal
   e. As used herein, “Contract” means an associated Agreement with the District

2. PREPARATION OF PROPOSALS:

A. CONTENTS OF PROPOSAL - OFFERORS must submit an original proposal and four (4) copies (total of five). All proposals shall address the following items in the order listed below. The proposal is to demonstrate the qualifications, competence and capacity of the firm as well as specify the report approach in conformity with all federal, state, District, and local requirements.

B. COVER LETTER, stating the validity of the firm and irrevocable proposal/offer through December 31, 2019, and other appropriate items. The proposal must bear the signature of a person duly authorized to sign the proposal on behalf of the Offeror, and reference this RFP 2019 - DEVELOPER FEE STUDY SERVICES and accept its terms and conditions or clearly and conspicuously indicate any exceptions.

C. DESCRIPTION OF FIRM - This section should provide a brief description of the firm and statement of interest and qualifications for providing the requested services, including information regarding the size, locations, nature of work performed, and years in business, and approach that will be used in meeting the needs of the District. Please include firm name, address and contact information, type of firm, names and titles of officers of the firm, and a list of any applicable certifications and licenses.

D. CONSULTANT’S PERSONNEL - Submit resume(s) or profiles of the individual(s) who will be assigned to provide the requested services for the first year of contracted services, including their qualifications and recent related experience providing similar services.

The Offeror should state the location of the office from which this engagement would be performed, and the number/nature of the staff to be employed in this engagement on a full-time and on a part-time basis.
E. CAPACITY & METHODOLOGY - Provide methodology for establishing a nexus that identifies and analyzes the various connections between residential development and the need for school facilities, the cost of school facilities and the amount of School Fees that can justifiably be levied. Scope of work includes providing School Facility Needs Analysis annually to maintain collection of Level II Developer Fees and Development Fee Justification Studies for both residential and commercial on even numbered years.

F. PAST PERFORMANCE – Description of past performances of similar service and related experience. Indicate how many years of experience the firm has providing similar services. Provide a list of public agencies including School Districts and the like, that your firm has provided similar services for. Include the most relevant and significant engagements performed in the last five (5) years that are similar to the size of engagement described in this RFP. The firm will also include a list of (5) client references that indicate the scope of work and the name and telephone number of the principal client contact.

Please include a recent Residential/ Commercial School Fee Justification Studies report and School Facilities Needs Analysis report. In addition, the firm shall provide information on the circumstances and status of any disciplinary action taken or pending against the firm during the past three years with state regulatory bodies or professional organizations.

G. CUSTOMER SERVICE TO NUSD COMMITMENT – Describe how the firm will provide service and fulfill the requirements and expectations of the District. Provide a description of how the services will be performed by Offeror. Offerors are encouraged to provide additional information or description of resources the firm feels is pertinent to the RFP. Include how the firm will communicate with District staff during the course of the preparation of the reports.

H. PROFESSIONAL SERVICE FEES – Using the RFP Attachment 1, provide a standard Fee Schedule including estimated hours. Fees must be inclusive of all costs, overhead, general administrative costs, mileage and travel, materials, labor, indirect and direct costs, profit, etc. Any annual fee escalation during option years 2, 3, 4 or 5 must be included.

J. OTHER REQUIREMENTS

a) Offerors shall execute and submit with any proposal/offer, the Attachment 1 “Firm Proposal/Offer Form.”

b) Each Offeror must execute Attachment 2 and answer the questions in Attachment 2 entitled: “Information Required of Offeror.”

c) Each Offeror must propose a Schedule of Fees and Charges (pricing) for the initial year and each of four (4) renewal option years (Attachment 1).

d) One (1) original and four (4) copies of the proposal shall be sealed together and submitted prior to the deadline time and due date and at the proper location. Unless this RFP is extended by a written amendment, proposals received after 4 p.m. on the due date, will not be considered.

e) 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 its evaluation of the proposal.

f) The proposal submitted must not contain erasure, interlineations, or other corrections unless each correction is clearly and conspicuously authenticated by signing in the margin immediately opposite the correction the name of the person signing the proposal. An Offeror will be bound by the terms and conditions of the proposal, notwithstanding the fact that errors may be or are contained therein. However, if material errors are actually discovered in a proposal, the DISTRICT will notify the Offeror that the proposal, as submitted, appears to contain errors and require the Offeror to correct the errors.

g) The DISTRICT reserves the right to award the Agreement as a result of the initial proposals received, or it may elect to conduct negotiations with those offerors as determined by the DISTRICT, to be within an acceptable competitive range, or to negotiate separately with any Offeror when it is determined to be in the best interest of the DISTRICT. In addition, the District may request that Offerors provide a best and final offer.

h) The DISTRICT may request a meeting with the Offeror’s representative to request answers and clarifications or it may request that the Offeror answer specific questions in
writing, or to make a presentation to the District or to its Governing Board prior to any Agreement award.

i) The DISTRICT may reject any or all proposals, and may waive informalities and minor irregularities in proposals received.

j) All proposals and materials submitted in response to this RFP shall become the property of the District and will be considered a part of the Public Record.

k) After District acceptance of the proposal, an agreement between the successful firm and the District will be executed and will consist of the terms and conditions of this RFP, the Statement of Work and Supplemental Terms and Conditions.

3. EXPLANATIONS TO OFFERORS:

a) If an Offeror desires an explanation or clarification of any kind regarding this RFP, the Offeror must make a written request for such explanation. Requests should be emailed to jmellor@natomasunified.org by September 17, 2019. The subject of the email must read RFP 2019 Developer Fee Study Services. General information regarding NUSD is available via the Internet at www.natomasunified.org. Answers to questions will be emailed in an addendum to all recipients of the RFP by September 19, 2019. The District will advise all known Offerors of the explanation or clarification, in writing via email as the District may in its sole discretion deem appropriate.

b) If an Offeror discovers any error such as an ambiguity, conflict, discrepancy, omission, or other error in the RFP, then the Offeror shall immediately notify the District in writing by email to jmellor@natomasunified.org.

4. AMENDMENTS:

Offerors are advised that the District reserves the right to amend the RFP at any time. Amendments will be done formally by providing written amendments to all known Offerors. If in the sole and absolute discretion of the District, the change is of such a nature that additional time is required for Offerors to prepare proposals, the District will change the due date deadline and notify all known Offerors in writing of the revised deadline due date.

Offerors must acknowledge receipt of any and all RFP amendments. This shall be done in writing by any one of the following means:

- In the cover letter or proposal
- Replying to email acknowledging receipt of amendment(s)
Regardless of the delivery method employed by the Offeror, acknowledgement of receipt of amendments must be actually received by the District prior to the specified deadline. Failure to acknowledge in writing the receipt of any amendments may result in proposal rejection.

5. VALIDITY OF FIRM PROPOSAL/OFFER:

Each proposal/offer must be a firm irrevocable offer, and remain open and valid for District acceptance through December 31, 2019.

6. SUBMITTING PROPOSALS:

Telegraphic or facsimile offers or electronic offers and modifications will NOT be considered.

7. MODIFICATION OR WITHDRAWAL OF PROPOSAL:

An Offeror may modify or withdraw a proposal after submission by written notice of withdrawal and re-submission provided that the proposal withdrawal is prior to the due date deadline specified for submission of proposals.

8. LATE PROPOSALS:

No proposal or proposal modification received after the due date deadline will be considered.

9. PROPOSAL EVALUATION:

It is anticipated that a contract will be made with the Offeror whose proposal is determined to be in the overall best interest of the District by applying the evaluation criteria established in this RFP.

A District committee will determine which, if any, proposal is in the District’s overall best interest to accept. The committee members will utilize a scale of 100 points to score the proposals on the criteria identified. During the evaluation, the District may request proposal clarifications, explanations and answers from an Offeror. The District may request an Offeror presentation and interview. If the District decides to request an interview, the interviews will be scheduled on a day during September 23 through September 26, 2019.

EVALUATION CRITERIA

Offerors are advised that all proposals will be evaluated to determine which proposal is the overall best interest to the District. Accordingly, evaluation will include but not be limited to the following criteria:

- Qualification (10%): To be considered, each of the following (3) items is required: (1) the firm is independent and licensed to practice in California; (2) the firm has no conflict of
interest with regard to any other work performed by the firm for the District; and (3) the firm submits a copy of a recent School Facilities Needs Analysis and Developer Fee Justification Study.

- Past Performance (25%): Experience and expertise of the firm in providing similar services to other public entities, especially school districts, and including the firm’s experience and performance on comparable size school district engagements. Current capacity and likelihood of the firm to accomplish the services herein for the duration of the time frame specified in the “Statement of Work” which include working during holidays, weekends, swing shifts, evening times, etc.

- Professional qualifications (25%): Professional experience and specialized experience of the proposed staff including the quality of the firm’s professional personnel to be assigned to the engagements and the quality of the firm’s management support personnel to be available for technical consultation; and the adequacy of the proposed staffing plan for various segments of the engagement and adequacy of analytical procedures.

- Completeness and clarity of proposal content (10%)

- Fees and overall cost to District (30%)

10. AGREEMENT REQUIREMENTS:

The firm selected will be required to promptly enter into the Agreement,

Attention should be paid to the following:

a) INSURANCE: The District requires that its Consultant carry Professional Liability Insurance coverage of at least $1,000,000. This insurance is to be paid by the Offeror. In addition the Offeror must provide comprehensive liability, automobile liability and worker’s compensation insurance coverage of at least $1,000,000 for each coverage.

b) FINGERPRINTING AND CRIMINAL BACKGROUND INVESTIGATIONS: The firm will execute a Certification by Contractor, Criminal Records Check by completing District form prior to the performance of any work at the District.

c) COMPENSATION AND PAYMENT: The agreement will be based upon a not to exceed amount and will be paid for completed work satisfactorily performed. All invoices will be paid based on units of work provided/completed as applicable.
11. SCHEDULE/WORK PRIORITIES:

Developer Fee Study services are to commence upon proposal acceptance by the District based on an agreed upon timeline. The field work will commence no earlier than December 1, 2019 and be completed no later than January 15, 2020. The final School Facility Needs Analysis and Residential/Commercial Developer Fee Justification Studies shall be delivered by January 30th each year. The firm is required to attend the March Board meeting to answer questions if needed.
FIRM PROPOSAL / OFFER FORM

Please complete this form, sign and return it with your proposal.

This Proposal/Offer Form must be duly executed and submitted with any proposal/offer to NUSD. The Offeror hereby agrees that its proposal/offer is subject to all RFP 2019-DEVELOPER FEE STUDY SERVICES provisions, terms and conditions, attachments, exhibits, amendments and other applicable materials which are attached or incorporated by reference. Offeror hereby agrees to promptly enter into an agreement substantially in accordance with such RFP provisions, terms and conditions. The District’s current fees for these services are $6,500 for odd years and $10,500 for even years.

The Offeror hereby agrees that its attached proposal/offer of which this is part, is a firm and irrevocable offer and valid for acceptance by NUSD for the period through and including May 31, 2019. The Offeror hereby agrees that if its proposal/offer is accepted by NUSD that it shall provide the services in accordance with the RFP, as it may be amended.

The quotation below is a maximum fee and includes reasonable profit.

______________________________(name of firm) proposed the following professional fee for the performance of all services identified herein, pursuant to the District’s RFP:

<table>
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<tr>
<th>Fiscal YEAR</th>
<th>TOTAL FEES</th>
<th>Fiscal YEAR</th>
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<tbody>
<tr>
<td>2019-20</td>
<td>$</td>
<td>2023-24</td>
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<td>2020-21</td>
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<td>2022-23</td>
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Name of Person
Duly Authorized to Execute Proposal/Offer: ___________________________________________________________________

Duly Authorized Signature: ___________________________________________________________________

Title: ___________________________________________________________________

Date of this Proposal/Offer: ___________________________________________
Please complete this form, sign and return it with your proposal.

The Offeror shall furnish all the following information accurately and completely. Failure to comply with this requirement may cause a proposal rejection.

SECTION A – ADDITIONAL GENERAL INFORMATION

1. 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?
   (a) If Yes, provide the name of the public agency and briefly detail the dispute:

2. Have you ever had a services agreement terminated for convenience or default in the prior five (5) years?
   (a) If Yes, provide details including the name of the other party:

3. Is your firm, 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?
   (a) If Yes, provide details:

4. Will your firm comply with all District, local, State and Federal legal requirements, regulations and laws?

5. In the past 15 years, have you ever had any direct or indirect business, financial or other connection with any official, employee or consultant of the District? Identify any conflict of interest in:
   (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 Information Required of Offeror is true and correct.

Executed this ______ day of _________________ at ________________________________, State of ____________________.

___________________________________
Signature

___________________________________
Print Name

___________________________________
Title
Selected firm shall complete this form prior to the performance of any work at the District.

CERTIFICATION
CRIMINAL RECORDS CHECK
AB 1610, 1612 and 2102

To the Governing Board of Natomas Unified School District:

I, _______________________________________________ certify that:
   (Name of Contractor)

1. I have carefully read and understand the Notice to Contractors Regarding Criminal Record Checks (Education Code Section 45125.1) required by the passage of AB 1610, 1612 and 2102.

2. Due to the nature of the work I will be performing for the District, my employees may have contact with students of the District.

3. None of the employees who will be performing the work have been convicted of a violent or serious felony as defined in the Notice and in Penal Code Section 1192.7 and this determination was made by a background-fingerprint check through the Department of Justice. I declare under penalty of perjury that the foregoing is true and correct.

Executed at ______________________, California on ___________________.
   (City)                                                            (Date)

____________________________________
Signature

____________________________________
Print Name

____________________________________
Title
REQUIRED DISTRICT FORMS

Please sign and return the following forms with your Proposal:

- Firm Proposal / Offer Form (page 12)
- Additional Information Required of Offer (pages 13-14)