

**REQUEST FOR QUALIFICATIONS AND LEASE-LEASEBACK PROPOSALS (“RFQ/RFP”)
OUSD OPERATIONS CENTER
for
Oceanside Unified School District**

RFQ/RFP NO. 2026-01-006P LLB

Oceanside Unified School District (“District”) invites proposals from qualified firms, partnerships, corporations, associations, persons, or professional organizations to enter into lease-leaseback (“LLB”) agreement(s) with the District to construct a “turnkey” project for the District, as more particularly described herein and in **Exhibit A** (“Project”), pursuant to the structure enumerated in Education Code section 17406, et seq.

Questions regarding this RFQ/RFP must be directed to the District’s Project Management group CCM/MAAS at the email address below. Interested firms or persons must submit their proposals as described below, with one (1) electronic copy and one (1) original proposal, and five (5) copies of requested materials, to:

Oceanside Unified School District

Attn: Rick Rodriguez
Sr. Project Manager
2111 Mission Ave.
Oceanside, Ca 92058

or via email request to Rick Rodriguez at rick.rodriquez@oside.us

All responses must be received by 08/21/2025 no later than 1:00pm.

This RFQ/RFP is not a formal request for bids, nor an offer by the District to contract with any party responding to this RFQ/RFP. The District reserves the right to reject any and all responses. The District also reserves the right to amend this RFQ/RFP as necessary. All materials submitted to the District in response to this RFQ/RFP shall remain property of the District.

This RFQ/RFP will also serve as a Prequalification Questionnaire, pursuant to Education Code section 17406 and Public Contract Code section 20111.6.

A. Time Table for Reviewing and Evaluating Proposals:

- Dates of Advertisement in Paper of General Circulation:
 - 1. First Week **07/31/2025**
 - 2. Second Week **08/07/2025**
- Date of Advertisement in Trade Paper of General Circulation **07/31/2025**
- Site walk: **08/11/2025 @ 9:00a 2070 Mission Ave. Oceanside, ca**
 In parking lot off Mission Ave.
- Submit all questions regarding RFQ/RFP on or before: **08/14/2025**
- Responses from District Due: **08/18/2025**

- RFQ/RFP Responses Due: **08/21/2025**
- District review of proposals: **August 21 – August 22, 2025**
- Interview period: **August 28-August 29, 2025**
- Selection to Cabinet: **September 2, 2025**
- Board Package Due to Cabinet: **September 2, 2025**
- Board Approval of LLB Contractor: **September 9, 2025**

Contractors submitting responses **must be prequalified** pursuant to Education Code section 17406 and Public Contract Code section 20111.6. Prequalification takes place **in advance of submitting a proposal response**, and prequalification applications are available by making a request to the email address above or see exhibit **B**.

In general, the firm(s) selected as a result of this process (“Firm” or “Contractor”) will provide a proposal to the District to perform the Project and thereafter work cooperatively with the District Board, staff and consultants, the architect of record and design team, and the Project inspectors, to facilitate the timely completion of the Project.

The District wishes to retain a Firm that has the financial strength, management and expertise to assist the District with delivering the Project within the proposed schedule. The District reserves the right to choose individual members of the Firm or the entire Firm.

B. Description of Project

The Project for which the District is seeking responses will include the District’s Project as more specifically described in **Exhibit A**, attached hereto.

Information on this Project may be found on the District’s Dropbox at:

https://www.dropbox.com/scl/fo/moh14wvfxv6bu1enb2oww/APw8bKJWJ_ok-rCLORM6XE8?rlkey=f6ynuqp66bpbpdmsgmwvj7go4&st=u58l1i8f&dl=0

C. Description of Preconstruction Services

Prior to finalizing the LLB agreement, the successful Firm may be required to enter into a Pre-Construction Services Agreement (“PCSA”) with the District to perform constructability review(s), develop detailed estimates and budgets, review the Project Plans, and develop specific cost reduction strategies to address budgetary constraints. The form of PCSA may vary according to the Project and may include the following scope, without limitation:

- a. Contractor shall work with District staff and Architect to develop an overall Project budget and Project schedule.
- b. Contractor shall assist District with providing plans and specifications for the modular building to be constructed.

- c. Contractor shall assist District by providing detailed and on-going evaluations of the Project, including the plans and specifications (the “Plans and Specifications”), detailed construction budget cost projections, project schedule and phasing requirements, analysis of the District’s overall Project budget, project constructability reviews of Architect’s work, leadership and participation in youth and community involvement efforts, and implementation of community benefits and local work force options and opportunities. Such evaluations shall include alternative approaches to design, development and construction of the Project.
- d. Contractor shall attend regular meetings during Project design, development, and document production phases between Architect, Construction Manager, and District, and any other applicable consultants of District, as required.
- e. Contractor shall assist with considering operating or maintenance costs with respect to selecting systems (including, but not limited to, mechanical, electrical, lighting, bell/intercom, etc.) for the Project. Contractor will provide lifecycle cost analyses as requested by District.
- f. Contractor shall perform a detailed analysis of both the preliminary and the final Plans and Specifications and provide District with value engineering and recommendations regarding scope and budget of the Project, suggested specific value engineering items, long lead purchases and a plan for revising the Plans and Specifications to the extent necessary to achieve District’s goals and objectives, including Project completion dates.
- g. Contractor shall assist District in obtaining all local and State licenses, permits, requirements, and approvals including, but not limited to, the City of Oceanside, Ca, and requirements of the California Environmental Quality Act.
- h. Contractor shall work with District’s legal counsel to prepare necessary agreements for completion of the Project.
- i. Contractor shall provide construction cost estimates at the following design milestones: Schematic Design, Design Development, and 50% Construction Documents.
- j. Contractor shall provide budget tracking during the course of design to determine the cost impact of the development of the design and scope changes.
- k. During the Construction Document phase of the design, Contractor shall coordinate the work of the subcontractors.
- l. Contractor shall negotiate with District a guaranteed maximum price (“GMP”) for the construction of the Project which shall become the basis for the Lease Agreements.
- m. Contractor shall perform any other services ordered by the District to facilitate the timely and cost-effective completion of the Project.

D. Agreement Structure and Key Elements of the Instrument to be Awarded

District will lease the applicable site to Contractor and require Contractor to construct improvements on the site.

The lease may include a financing component for the Project either through third party financing or by extension of the term of the lease beyond the duration of the construction for a period mutually agreeable to the parties (likely between six (6) months and two (2) years).

The District will have the ability to occupy the Project site during the financing period, and a portion of the construction cost due to Contractor will be paid as lease payments during the financing period. Financed amounts shall be subject to a mutually agreeable financing charge. The agreement will permit the District to pay the financed amounts early, and at any time after Project completion.

F. Guaranteed Maximum Price (“GMP”) Development

- a. As discussed below, the District is asking Contractors to provide price proposals for their fees for construction and preconstruction services, expressed as percentages of the total costs to Contractor to complete the work.
- b. Prior to finalization of the GMP, the Contractor will be required to provide the District with objectively verifiable information of all of its costs to complete the work. The parties will then apply the percentage fee proposals from the Contractor for preconstruction and construction work, and add them to this total cost figure, the sum of which shall be the GMP for the Project.
- c. The District will expect to have access to objectively verifiable information for all of Contractor's costs, including but not limited to subcontractor bids, value engineering back-up, contingency breakdown and tracking documents, general conditions breakdown and tracking documents, and Contractor fees.

G. Subcontractor Procurement

The Firm will select subcontractors in accordance with Education Code section 17406. Specifically, the following subcontracting procedures shall be applicable to this Project:

- a. Proposals do not need to identify all subcontractors who will be used. However, Contractors may identify subcontractors who will be used. The identification must be clear. All subcontractors that are identified in the proposal shall be afforded the protections of the Subletting and Subcontracting Fair Practices Act (Chapter 4 (commencing with Section 4100) of Part 1 of Division 2 of the Public Contract Code).
- b. For subcontractors not identified in the proposal, the successful proposer shall proceed as follows in awarding construction subcontracts with a value exceeding one-half of 1 percent (1%) of the price allocable to construction work:

- (i) Provide public notice of availability of work to be subcontracted in accordance with the publication requirements applicable to the competitive bidding process of the District (once per week for two (2) weeks in a newspaper of general circulation), including a fixed date and time on which qualifications statements, bids, or proposals will be due.
- (ii) Establish reasonable qualification criteria and standards.
- (iii) Award the subcontract either on a best value basis or to the lowest responsible bidder. This process may include prequalification or short-listing. This process shall not apply to subcontractors listed in the original proposal. Subcontractors awarded construction subcontracts using this process shall be afforded all the protections of the Subletting and Subcontracting Fair Practices Act (Chapter 4 (commencing with Section 4100) of Part 1 of Division 2 of the Public Contract Code).

H. AB 566

Contractors must comply with AB 566 requirements to provide a “skilled and trained workforce.”

I. Conflict of Interest

Firm shall certify that no official or employee of the District, nor any business entity in which an official of the District has an interest, has been employed or retained to solicit or assist in the procuring of the resulting construction agreement, nor that any such person will be employed in the performance of any construction agreement without immediately divulging of this fact to the District.

J. Description of Format that Proposals Shall Follow and Elements the Proposals Shall Contain

Once prequalified, all responses should include the following elements in the format and order set forth below:

- a. **Cover Letter**
- b. **Table of Contents**
- c. **Project Specific Proposals**

For each Project:

- (i) Provide your proposed fee for the Project expressed as a percentage of the total cost to Contractor to complete the Project.
- (ii) Specify your proposed fee for any preconstruction services expressed as a percentage of the total cost to Contractor to complete the Project.

Note: As discussed above in the Guaranteed Maximum Price (“GMP”) Development section, these percentages and Contractor’s objectively verifiable costs will form the basis for the contract’s GMP.

- (iii) Specify the warranty period included in this estimate, and any warranty restrictions.
- (iv) Describe your experience with projects similar to those being considered by the District.
- (v) Provide specific examples of similar projects you have completed using an LLB delivery method, and state whether you were able to return any unused contingency to the District.
- (vi) Describe how you would determine pricing for the Project.

4. Company Profile, Including:

- (i) Name, address, and brief history of the Firm. Please include any former names of the Firm and the number of years the Firm has participated in construction as a general.
- (ii) Your Department of Industrial Relations Registration Number.
- (iii) Organizational chart of the Firm.
- (iv) A description of the Firm and its organizational structure. Resumes of personnel to be involved with the Project will be included, including their school construction experience. Upon engagement, any change in personnel must be approved by the District. The Firm shall be responsible for any additional costs incurred by the engagement of a change in personnel.
- (v) Provide the volume of construction in dollars for each of the past five (5) years.
- (vi) Provide a statement regarding the Firm’s availability, experience and personnel resources.
- (vii) Provide a statement on financial resources, bonding capacity, and insurance coverage.
- (viii) Provide a claims statement: Submit a statement indicating any and all suits or claims in which the Firm or its personnel were involved in any way with litigation regarding construction projects within the past five (5) years.
- (ix) Contractor license number and whether license has been revoked or suspended in the last five (5) years.
- (x) Provide signatory status.

- (xi) Location of nearest local office and main office, if different.

5. Prior Relevant Experience

Hold a Class B Contractors License which is current, valid, and in good standing with the California Contractors State License Board;

Have completed minimum of two (2) Lease Leaseback projects with an original contract value of \$30,000,000 or more during the past ten (10) years.

- A list of all projects your Firm has been involved with for the past five (5) years where the total project contracts exceeded \$5,000,000.00 per project. Within that list:
 - Include all projects involving public and private Commercial Operations Buildings;
 - Provide a contact name and number for the owners and indicate which key Firm personnel worked on each project. List those areas where subconsultants will be required and where the Firm has in-house expertise. Provide resumes of persons providing each of these services and for key personnel assigned to the Project.
- Include examples of other similar project assignments on the part of the Firm.
- List projects your Firm has successfully completed that have some or all of the following obstacles, including the creative solutions from the Firm on how these obstacles were overcome:
 - A very aggressive schedule;
 - Significant budgetary restrictions.
 - Be prepared to expand upon the following:
 - what you did to accommodate the complexity of the Project,
 - the needs of the clients on site,
 - minimize inconveniences, and
 - maximize their safety.

6. Other Information

Proposers should examine the District's selection criteria below and submit any information they believe would assist the District in evaluating their proposal.

	EXPLANATION	MAXIMUM POINTS
Bonding Capacity ¹	Must Have Bonding Capacity of 4 Times Construction Estimate	Pass/Fail
		Total Possible
A. Quality of Overall Proposal		5 pts
B. Business Profile - Qualifications & Experience		15 pts
C.1 Services Provided/ Experience		20 pts
C.2 Constructability		20 pts
D.1 Staff Resume, References & Experience		30 pts
E. Fee/ Cost		10 pts
F. Interview		35 pts
		Total Score: 135 maximum possible

1. Bonding Capacity requirement is pass/fail. If the proposer does not have a bonding capacity of 4 times the construction estimate, the proposal will be rejected as non-responsive/non-responsible.
2. All proposers submitting a response to RFP's for Lease/Leaseback must be prequalified with the District in accordance with Public Contract Code §20111.6. The District is not responsible for late submissions, incomplete prequalification packets, or failure of proposers to prequalify prior to the statutory deadline.

I. EVALUATION AND AWARD

Proposals shall be evaluated and the Agreement for project shall be awarded in the following manner:

1. All proposals received shall be reviewed to determine those that meet the format requirements and the standards specified in the RFQ/P and are responsive and responsible.
2. District shall evaluate the qualifications of the responsive/responsible proposers based upon the criteria and evaluation methodology set forth in this RFQ/P, and shall assign a Base Score to each proposal. Once the evaluation is complete, all responsive proposals shall be

ranked from the highest best value to the lowest best value to the District.

3. The proposers receiving the top 3 Base Scores will be invited to interview. The interview points will be added to the Base Score for a total Best Value Score. The highest score will be ranked 1; the second highest score will be ranked 2, and the third highest score will be ranked 3.
4. The Board of Trustees shall award the Agreement for the project to the responsive proposer whose proposal is determined in writing by the District Board, based on the criteria established, to be the Best Value to the District.
5. If the selected proposer refuses or fails to execute the tendered Agreement (proposed contract), the Board of Trustees may award the Agreement to the proposer with the second highest Best Value Score if the Board of Trustees deems it to be in the best interest of the District. If the second selected proposer refuses or fails to execute the tendered Agreement, the District Board may award the Agreement to the proposer with the third highest best value score if the governing board deems it to be for the best interest of the District
6. Notwithstanding any other law, upon issuance of a contract award, the District shall publicly announce its award, identifying the entity to which the award is made, along with a statement regarding the basis of the award. The statement regarding the District's contract award and the contract file shall provide sufficient information to satisfy an external audit.

A review and selection committee that the District intends to be composed of key personnel from within and outside the District will review and evaluate all submitted documents received per this RFQ/RFP.

Submittals will be opened privately to assure confidentiality and avoid disclosure of the contents to competing respondents prior to and during the review, evaluation and negotiation processes. However, to the extent that the submittals are public records under California law, the submittals may be released to the public if requested by members of the public. Responses to this RFQ/RFP will become the property of the District and subject to the California Public Records Act, Government Code sections 6250, et seq. Those elements in each response that are trade secrets as that term is defined in Civil Code section 3426.1(d) or otherwise exempt by law from disclosure and which are prominently marked as "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY" may not be subject to disclosure. The District shall not be liable or responsible for the disclosure of any such records including, without limitation, those so marked if disclosure is deemed to be required by law or by an order of the Court. A Firm that indiscriminately identifies all or most of its response as exempt from disclosure without justification may be deemed non-responsive. In the event the District is required to defend an action on a Public Records Act request for any of the contents of a response marked "Confidential," "Proprietary," or "Trade Secret," the Firm agrees, by submission of its response for the District's consideration, to defend and indemnify the District from all costs and expenses, including attorneys' fees, in any action or liability arising under the Public Records Act. Any Contractor submitting a Proposal recognizes that Proposals submitted by other Contractors will not be disclosed prior to the District's recommendation for selection.

Submittals will be reviewed for responsiveness and evaluated pursuant to established objective criteria, with particular attention to, without limitation, each Firm's qualifications, demonstrated competence in like construction, and the Firm's ability to integrate its personnel with the District's staff and consultants.

Limit all submittals to 50 pages.

After the submittals are scored and/or ranked, the District, at its sole discretion, may elect to interview the top 3 Firm(s) or simply make a selection.

If a selection is made, it will be to the most qualified respondent with whom the District is able to successfully negotiate the terms and conditions of the required agreement documents.

Final selection of a Firm, terms and conditions of any and all agreements, and authority to proceed with noted construction services, shall be at the discretion of the District.

If the District is unable to successfully negotiate a satisfactory agreement with terms and conditions that the District determines to be fair and reasonable, the District may then commence negotiations with another Firm until an agreement is reached or determination is made to reject all submittals.