

## Request 1: General Information

### 1. Scope of Work

The City of Santa Cruz wishes to engage an individual or company to develop a building program, and provide cost estimates, for the Downtown Library and administrative units in concert with the Downtown Library Advisory Committee, library staff, and the public. The plan is to be completed by July 1, 2017.

In 2013, the Santa Cruz Public Libraries created a Facilities Master Plan to evaluate current library structures and make recommendations for improvements. The Master Plan identified the Downtown Library as a critical resource for the entire region since it houses a number of special collections (genealogy, history and music), holds the largest print collection, and maintains the strongest patron use in the system. The Master Plan recommended an extensive renovation or complete replacement because of deferred maintenance, failing infrastructure and lack of accessibility in the current 44,000 square foot structure. A copy of the Master Plan is provided.

In June 2016, voters approved Measure S, a \$67 million library facilities bond measure, of which approximately \$23 million is for the Downtown Library improvement project

The planning process for the building program should include analyses of:

- national library trends
- assessments of current and future library services
- examination of the existing building conditions
- an evaluation of the library service needs for City residents over the next twenty years

The objectives of this project are to:

1. Provide a solid foundation for the proper evaluation of a facility site,
2. Support the creation of schematic designs through the development of a detailed building program,
3. Examine the feasibility of co-locating the SCPL administrative offices (currently residing elsewhere in 14,000 square feet) on site with the Downtown Library,
4. Examine the feasibility of co-locating the Downtown Library, and possibly the SCPL administrative offices, with a new parking structure to be built in the downtown area, and
5. Estimate the cost of program goals against the current budget.

### 1.2 Contact

If you have any questions concerning this solicitation, contact Susan Nemitz, Library Director at [831] 427-7700, ext. 7611 or [nemitzs@santacruzpl.org](mailto:nemitzs@santacruzpl.org)

## 2: Process and Instructions

### 2.1 Deadline

Deliver four copies and one unbound original of the submittal in a sealed envelope labeled “Submittal Documents for Request for Qualifications for Downtown Library Building Program,” before 3:00 pm on March 17, 2017 to Santa Cruz Public Library Administration, 117 Union Street, Santa Cruz, CA 95060. Email an electronic copy of the submittal to Susan Nemitz, Library Director at nemitzs@santacruzpl.org on the next business day after the due date.

Late submittals will not be considered.

## 2.2 Schedule

The City will make every effort to adhere to the following schedule:

Action	Anticipated Dates
Issue RFQ	February 27, 2017
Submittal due date	March 17, 2017
Notice of intent to award	March 31, 2017
Kick off meeting	April 10, 2017
Project completion	July 1, 2017

## 2.3 Submittal Format

Submittals should be organized as follows:

1. **RFQ Cover Page:** Provides basic contact information and an authorized signature accepting the City’s terms and conditions as stated in this solicitation.
2. **Company Response to RFQ Questionnaire :**Answers should be complete and in the order presented. Make your submittal as short as possible and do not include generic marketing materials.
3. **Fee Schedule:** Provide complete pricing for all items listed. Include all possible costs. Company will not be allowed to charge for costs not included in the submittal.
4. **Optional Documents:** Companies may include sample reports, peer review reports, letters of recommendation, or other exhibits that may assist the City in favorably evaluating the Company. Do not include generic marketing materials.

Companies have the right to take exception to the specifications or terms to this solicitation. Any exceptions taken must be explained in the submittal. Any exceptions that contradict the City’s terms and conditions, or contain provisions that are not in the best interest of the City will disqualify the company. If exceptions are not explained, the Company will comply with the specifications as stated in this solicitation.

The City will not reimburse costs of preparing the submittals. Responding companies bear sole risk and responsibility for costs incurred in the preparation and delivery of the submittal.

## 2.4 Addenda

The City may determine it is necessary to revise any part of this solicitation. Revisions will be made by written addenda and it is the Company's responsibility to comply with any addenda to this solicitation. Any addenda will be:

- Emailed to known interested companies, or
- Posted on the City's website, [www.cityofsantacruz.com](http://www.cityofsantacruz.com), under Bidding Information, or
- Companies may contact Susan Nemitz, Library Director at [831] 427-7700, ext. 7611 or [nemitzs@santacruzpl.org](mailto:nemitzs@santacruzpl.org)

## 2.5 NonResponse

In the event your company decides not to submit a submittal, please return the Acknowledgement of Receipt Form, Section 5. It would be helpful if you indicated why your company did not wish to submit a submittal. Failure to respond to this RFQ may result in the removal of your company's name from the bid list.

## 2.6 Evaluation

Submittals will be evaluated and ranked according to the criteria below by an evaluation committee composed of Library and City staff. The evaluation committee will open and review the submittals in confidence. Submittals will be available to the public after contract award.

<u>Criteria</u>	<u>Weight</u>
1. Understanding of the project	10%
2. Knowledge of library practices	10%
3. Knowledge of library buildings and construction	10%
4. Proposed work plan	35%
5. Qualifications, experience and references	30%
6. Overall quality of submittals	5%

The contract will be awarded to the company who, in the judgment of the City, offers the most qualified and responsible submittal.

A company's failure to promptly respond to City's inquires for submittal clarification may result in determination of non-responsibility.

The City reserves the right to reject any or all submittals and waive any informality or minor defects in submittals received.

## 2.7 Optional Evaluation of Semi-Finalists

After the initial submittal evaluation, the City may determine that additional information is needed to establish the final ranking of companies. The semi-finalists will be contacted and may be asked to:

- Make an oral presentation by responding to pre-established questions,
- Conduct a scenario-based demonstration of the equipment or service,

- Revise the submitted submittal for the purpose of obtaining best and final offers, and/or
- Provide additional information to assist City in determining the best value company.

All semi-finalists will be given equal opportunity to provide the requested information to the City. Any oral presentations and/or demonstrations will be scheduled for a mutually agreed upon date and will be at no cost to the City.

The Evaluation Committee will use all information collected to rank the semi-finalists in order of their ability to best meet the requirements of the City. The City will begin negotiating a company contract with the highest ranked Company. If no agreement can be reached, negotiations will begin with the next ranked Company.

### **2.8 Negotiations**

The City will enter into price negotiations with the highest ranked, candidate. Should those negotiations be unsuccessful, the City will negotiate with the next highest ranked candidate.

When price negotiations are successful, the City will enter contract negotiations with that candidate. Should the contract negotiations be unsuccessful, the City will negotiate price with the next highest ranked candidate.

### **2.9 Contract Implementation**

The contract resulting from this solicitation is tentatively scheduled to begin in April 2017. Upon award notification and prior to final contract approval, the successful proposer will be required to submit:

- a. Proof of insurance and living wage ordinance compliance documentation as specified in section 4.1 and 4.4 of this solicitation;
- b. Documentation of all credentials necessary to legally perform the services specified;
- c. A completed W9 form and, if applicable, non-resident withholding exemption form, if not already on file with the City; and
- d. Proof of a current City of Santa Cruz company tax certificate if the Company is located in, or performs services within, the city limits for more than 6 days annually.

The finalized contract will include all sections of this RFQ document except for section 2 (Process and Instructions) the company's Cover Page, the company's response to the RFQ Questionnaire, and the Fee Schedule provided and any negotiated modifications agreed to by the parties.

### **2.10 Public Record**

Submittals received will become the property of the City. All submittals, evaluation documents, and any subsequent contracts will be subject to public disclosure per the "California Public Records Act," California Government Code, sections 6250 – 6270. All documents related to this solicitation will become public records once discussions and negotiations with proposers have been fully completed and an award has been announced.

Appropriately identified trade secrets will be kept confidential to the extent permitted by law. Any submittal section alleged to contain proprietary information will be identified by the proposer in boldface text at the top and bottom as "Proprietary." Designating the entire submittal as proprietary is not acceptable and will not be honored. Submission of a submittal will constitute an agreement to this provision for public records. Pricing information is not considered proprietary information.

### **2.11 Award Protests**

The City desires to foster cooperative relationships with companies and to reach a fair agreement in a timely manner.

Any company who unsuccessfully bids on a city contract or any trade association representing workers who would have potentially been employed by such contract may formally protest a contract award. Protests letters regarding an informal contract award will be directed to: Susan Nemitz, Library Director at [831] 427-7700, ext. 7611 or [nemitzs@santacruzpl.org](mailto:nemitzs@santacruzpl.org)

Protests regarding the contract award must be received no later than 5 business days after the written notice of intention to award has been distributed. The award protest must be in writing and include:

- The name, address, and telephone number of the protester;
- The solicitation title and due date;
- A detailed statement of the legal and/or factual grounds for the protest; and
- The form of relief requested.

Throughout the protest review process, the City has no obligation to delay or otherwise postpone an award of a contract.

### 3: Terms and Conditions

#### 3.1 City's Standard Terms and Conditions

The City of Santa Cruz standard terms and conditions shall govern this contract. Review the terms and conditions at <http://www.cityofsantacruz.com/terms>; all terms including, but not limited to, insurance apply to the contract resulting from this solicitation. A current copy of these terms will be included in the resulting contract as an Exhibit. A hard copy of the terms and conditions are available by contacting the Purchasing Division at 831/420-5080.

#### 3.2 Responsibilities of Company

All work performed by Company, or under its direction, shall satisfy the City's objectives for entering into this Agreement and shall be rendered in accordance with the generally accepted practices, and to the standards of, Company's profession.

Company shall not undertake any work beyond the Scope of Work set forth in Exhibit A unless such additional work is approved in advance and in writing by City. The cost of such additional work shall be reimbursed to Company by City on the same basis as provided for in Section 4.

If, in the prosecution of the work, it is necessary to conduct field operations, security and safety of the job site will be the Company's responsibility excluding, nevertheless, the security and safety of any facility of City within the job site which is not under the Company's control.

Company shall meet with Susan Nemitz, Library Director, hereinafter called "Director", or other City personnel, or third parties as necessary. Such meetings shall be held at the request of any party.

#### 3.3 Responsibilities of the City

City shall make available to Company all necessary data and information in the City's possession and shall actively assist Company in obtaining such information from other agencies and individuals as needed.

The Director may authorize a staff person to serve as his or her representative. The work in progress shall be reviewed at such intervals as may be mutually agreed upon between the parties. The City will be the sole judge of acceptable work. If the work is not acceptable, City will inform Company of the changes or revisions necessary to secure approval.

#### 3.4 Payments

Payments will be made in accordance with the fee schedule agreed to as the project milestones are achieved. Payments will be no more often than monthly.

The use of vehicles for travel, including rental vehicles, shall be paid at the maximum rate of the current standard company mileage rate as established by the U.S. Internal Revenue Service. Commercial airline travel shall be reimbursed at coach class rates. Lodging, meals, and incidental expenses shall be

reimbursed at the current per diem rates established by the U.S. General Services Administration. Per diem expenses in excess of \$75 require submittal of acceptable substantiating documentation for each such expense. Companies shall be entitled to 75% of the prescribed meals and incidental expenses for the first and last day of travel and for one day travel if it is longer than 12 hours. It is expected that all expenses associated with travel incurred by the Company, while conducting activities on behalf of the City, will be at reasonable rates and that the Company will exercise prudence in incurring such expenses.

### **3.5 Changes in Work**

City may negotiate changes in the Scope of Work. No changes in the Scope of Work shall be made without the City's written approval. Any change requiring compensation in excess of the sum specified in Exhibit B shall be approved in advance in writing by the City.

### **3.6 Time of beginning and Schedule for Completion**

Company shall begin work upon its receipt of a written Notice to Proceed from Director. The Notice to Proceed shall not be issued until after this Agreement has been approved and authorized by the Department Head.

The schedule for completion of the work shall be as shown upon Exhibit C. In the event that major changes are ordered, the schedule for completion as stated in Exhibit C will be adjusted by City so as to allow Company a reasonable period of time within which to complete any additional work which may be required as a result of the ordered changes.

Neither party will be held responsible for delay or default caused by declared emergencies, natural disasters, or any other cause which is beyond the party's reasonable control. Company will, however, make all reasonable efforts to remove or eliminate such a cause of delay or default and will, upon the cessation of the cause, diligently pursue performance of its obligations in this agreement.

The City reserves the right to obtain the item(s) covered by this contract from another source during any on-going suspension of service due to the circumstances outlined above.

Company acknowledges that it is necessary for Company to complete its work on or before the completion date set forth in Exhibit C in order to allow the City to achieve its objectives for entering into this Agreement. The parties therefore agree that time is of the essence in the performance of this Agreement.

### **3.7 Termination**

The City or Company may terminate the agreement for convenience by providing written notice to the other party not less than 30 calendar days prior to an effective termination date.

The City or Company may terminate the agreement for material breach of agreement by providing written notice to the other party not less than 14 calendar days prior to an effective termination date.

Upon notice of termination, the Company will immediately take action not to incur any additional obligations, costs or expenses, except as may be reasonably necessary to terminate its activities. The City's only obligation to the Company will be just and equitable payment for services authorized by, and received to the satisfaction of, the City up to and including the effective date of termination. All finished or unfinished work or documents procured or produced under the agreement will become property of the City upon the termination date. The City reserves the right to obtain these services elsewhere, and the defaulting Company will be liable for the difference between the prices set forth in the terminated agreement and the actual cost to the City. In no event will the City be liable for any loss of profits on the resulting agreement or portion thereof so terminated. After the effective date of termination, Company will have no further claims against the City under the agreement. Termination of the agreement pursuant to this paragraph may not relieve the Company of any liability to City for damages sustained by City because of any breach of agreement by Company, and City may withhold any payments to Company for the purpose of setoff until such time as the exact amount of damages due City from Company is determined

The rights and remedies provided in this section will not be exclusive and are in addition to any other rights and remedies provided by law or under the agreement.

### **3.8 Subcontractors**

Subcontracting of work without prior approval of the City, may result in contract termination. If at any time, the City determines any subcontractor is incompetent or undesirable, Company will be notified and will be expected to immediately cancel the subcontract.

### **3.9 Insurance**

Consultant shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by Consultant, its agents, representatives, or employees.

#### **MINIMUM SCOPE AND LIMIT OF INSURANCE**

Coverage shall be at least as broad as:

1. Commercial General Liability (CGL): Insurance Services Office Form CG 00 01 covering CGL on an "occurrence" basis, including products and completed operations, property damage, bodily injury and personal & advertising injury with limits no less than \$1 million per occurrence. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location (ISO CG 25 03 or 25 04) or the general aggregate limit shall be twice the required occurrence limit.
2. Automobile Liability: Insurance Services Office Form Number CA 00 01 covering, Code 1 (any auto), or if Consultant has no owned autos, Code 8 (hired) and 9 (non-owned), with limit no less than \$1,000,000 per accident for bodily injury and property damage.
3. Workers' Compensation insurance as required by the State of California, with Statutory Limits, and Employer's Liability Insurance with limit of no less than \$1,000,000 per accident for bodily injury or disease. The Workers' Compensation policy shall be endorsed with a waiver of subrogation in favor



of the City of Santa Cruz for all work performed by Consultant, its employees, agents, and subcontractors.

4. Professional Liability (Errors and Omissions): Insurance appropriate to Consultant's profession, with limit no less than \$1 million per occurrence or claim, \$2 million aggregate.

If Consultant maintains broader coverage and/or higher limits than the minimums shown above, the City of Santa Cruz requires and shall be entitled to the broader coverage and/or higher limits maintained by Consultant. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the City of Santa Cruz.

#### **Other Insurance Provisions**

The insurance policies are to contain, or be endorsed to contain, the following provisions:

#### **Additional Insured Status**

The City of Santa Cruz, its officers, officials, employees, agents, and volunteers are to be covered as additional insureds on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of Consultant including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to Consultant's insurance (at least as broad as ISO Form CG 20 10 11 85 or, if not available, through the addition of both CG 20 10, CG 20 26, CG 20 33, or CG 20 38; and CG 20 37 forms if later editions are used).

#### **Primary Coverage**

For any claims related to this contract, Consultant's insurance coverage shall be primary coverage at least as broad as ISO CG 20 01 04 13 as respects the City of Santa Cruz, its officers, officials, employees, agents and volunteers. Any insurance or self-insurance maintained by the City of Santa Cruz, its officers, officials, employees, agents, or volunteers shall be excess of Consultant's insurance and shall not contribute with it.

#### **Notice of Cancellation**

Each insurance policy required above shall provide that coverage shall not be canceled, except with notice to the City of Santa Cruz.

#### **Waiver of Subrogation**

Consultant hereby grants to City of Santa Cruz a waiver of any right to subrogation which any insurer of said Consultant may acquire against the City of Santa Cruz by virtue of the payment of any loss under such insurance. Consultant agrees to obtain any endorsement that may be necessary to effect this waiver of subrogation, but this provision applies regardless of whether or not the City of Santa Cruz has received a waiver of subrogation endorsement from the insurer.

The Workers' Compensation policy shall be endorsed with a waiver of subrogation in favor of the City of Santa Cruz for all work performed by Consultant, its employees, agents, and subcontractors.

**Self-Insured Retentions**

Self-insured retentions must be declared to and approved by the City of Santa Cruz. The City of Santa Cruz may require Consultant to purchase coverage with a lower retention or to provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention. The policy language shall provide, or be endorsed to provide, that the self-insured retention may be satisfied by either the named insured or the City of Santa Cruz.

**Acceptability of Insurers**

Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII, unless otherwise acceptable to the City of Santa Cruz.

**Claims Made Policies**

If any of the required policies provide claims-made coverage:

1. The Retroactive Date must be shown, and this date must be before the execution date of the contract or the beginning of contract work.
2. Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of contract work.
3. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a Retroactive Date prior to the contract effective date or start of work date, Consultant must purchase "extended reporting" coverage for a minimum of five (5) years after completion of contract work.

**Verification of Coverage**

Consultant shall furnish the City of Santa Cruz with original certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by this contract. All certificates and endorsements are to be received and approved by the City of Santa Cruz before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive Consultant's obligation to provide them. The City of Santa Cruz reserves the right to require complete, certified copies of all required insurance policies, including declarations and endorsements required by these specifications, at any time.

The City's standard Certificate of Insurance requirements include the following:

1. The Certificate(s) will show current policy number(s) and effective dates;
2. Coverage and policy limits will meet, or exceed, the requirements above;
3. The Certificate Holder will be City of Santa Cruz, Risk Management, 877 Cedar Street, Suite 100, Santa Cruz, CA 95060;
4. The Certificate(s) will be signed by an authorized representative.

**Subcontractors**

Consultant shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein, and Consultant shall ensure that City of Santa Cruz, its officers, officials, employees, agents, and volunteers are additional insureds on insurance required from subcontractors. For CGL coverage subcontractors shall provide coverage with a form at least as broad as CG 20 38 04 13.

**Special Risks or Circumstances**

City of Santa Cruz reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.

**3.10 Indemnification**

Company agrees to indemnify, defend, and hold harmless the City, its officials, officers, agents, employees, and volunteers from and against any and all claims, demands, actions, damages, or judgments, including associated costs of investigation and defense arising in any manner from Company's negligence, gross negligence, recklessness, or willful misconduct or patent or copyright violation in the performance of this agreement.

**3.11 Equal Employment Opportunity**

The City of Santa Cruz strongly supports equal employment opportunities for all and requires its Companies to ensure that effective policies and procedures concerning the prevention of illegal discrimination and harassment exist in their companies. In addition, all Companies must be in compliance with all applicable Federal and State and local equal employment opportunity acts, laws, and regulations. The City's current Equal Employment Opportunity and Anti-Discrimination policies to which this provision applies may be viewed at <http://www.codepublishing.com/CA/SantaCruz/?SantaCruz09/SantaCruz0983.html>.

**3.12 Legal Action/Attorneys' Fees**

If any action at law or in equity is brought to enforce or interpret the provisions of this Agreement, the prevailing party shall be entitled to reasonable attorneys' fees in addition to any other relief to which he or she may be entitled. The laws of the State of California shall govern all matters relating to the validity, interpretation, and effect of this Agreement and any authorized or alleged changes, the performance of any of its terms, as well as the rights and obligations of Company and the City.

**3.13 Assignment**

This Agreement shall not be assigned without first obtaining the express written consent of the Director .

**3.14 Miscellaneous Provisions**

1. **Project Manager.** Director reserves the right to approve the project manager assigned by Company to said work. No change in assignment may occur without prior written approval of the City.

2. Company Services Only. Company is employed to render professional services only and any payments made to Company are compensation solely for such professional services.
3. Licensure. Company warrants that it has complied with any and all federal, state, and local licensing requirements and agrees to provide proof of a current City of Santa Cruz Company Tax Certificate if:
  - Company is located in the City of Santa Cruz;
  - Will perform physical work in the City of Santa Cruz for 6 or more days annually; or
  - Will use company vehicles to deliver within the City of Santa Cruz for 6 or more days annually.For additional information and licensing requirements, view the City's [Company Licenses and Permits webpage](#) or call the Revenue and Taxation division at 831/420-5070.
4. Other Agreements. This Agreement supersedes any and all other agreements, either oral or in writing, between the parties with respect to the Scope of Work specified in Exhibit A.
5. City Property. The work, or any portion, of Company in performing this Agreement shall become the property of City. The Company shall be permitted to retain copies or such work for information and reference in connection with the City's use; however, such work shall not be used by the Company on other projects, except by agreement in writing by the City.
6. Company's Records. Company shall maintain accurate accounting records and other written documentation pertaining to the costs incurred for this project. Such records and documentation shall be kept available at Company's office during the period of this Agreement, and after the term of this Agreement for a period of three years from the date of the final City payment for Company's services.
7. Independent Contractor. In the performance of its work, it is expressly understood that Company, including Company's agents, servants, employees, and subcontractors, is an independent contractor solely responsible for its acts and omissions, and Company shall not be considered an employee of the City for any purpose.
8. Company Not an Agent. Except as City may specify in writing, Company shall have no authority, express or implied, to act on behalf of City in any capacity whatsoever as an agent. Company shall have no authority, express or implied, pursuant to this Agreement to bind City to any obligation whatsoever.
9. Conflicts of Interest. Company stipulates that corporately or individually, its company, its employees and subcontractors have no financial interest in either the success or failure of any project which is, or may be, dependent on the results of the Company's work product prepared pursuant to this Agreement.
10. MacBride Principles/Peace Charter. City of Santa Cruz Resolution NS-19,378 (7/24/90) encourages all companies doing company in Northern Ireland to abide by the MacBride Principles and Peace Charter.
11. Storm Water Requirements. The Contractor, and all subcontractors, are required to abide by the applicable City of Santa Cruz Storm Water Best Management Practices (BMPs) for the duration of the work. The City's mandatory Storm Water BMPs, which are listed according to the type of work, operations, or company, are located on the City website at: <http://www.cityofsantacruz.com/index.aspx?page=138>.

**4: Statement of Qualifications Cover Page**

**1. Deadline**

Deliver one unbound original of the submittal in a sealed envelope before 3:00 pm on March 17, 2017 to Santa Cruz Public Library Administration, 117 Union Street, Santa Cruz, CA 95060.

Email a copy of the submittal to Susan Nemitz, Library Director at nemitzs@santacruzpl.org on the next company day after the due date.

Late submittals will not be considered.

**2. Response Sheet**

The undersigned, upon acceptance, agrees to furnish the following in accordance with the specifications and terms and conditions per City of Santa Cruz “Request for Qualifications for Downtown Library Building Program” dated March 2017, at the prices indicated herein.

The undersigned,

- under penalty of perjury, declares not to be a party with any other company to an agreement to bid a fixed or uniform price in connection with this submittal.
- declares under penalty of perjury that she/he is authorized to sign this document and bind the company or organization to the terms of this contract.
- recognizes the right of the City of Santa Cruz to reject any or all submittals received and to waive any informality or minor defects in submittals received.

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

E-mail address: \_\_\_\_\_

Signature of Authorized Representative: \_\_\_\_\_

Printed Name of Authorized Representative: \_\_\_\_\_

Date: \_\_\_\_\_

**3. Addenda**

How many addenda were issued for this solicitation? \_\_\_\_\_



### 5: Statement of Qualifications

Answer all of the following questions. Any omission may be cause for rejection of submittal. Answers should be complete and in the order presented. A simple "yes" or "no" answer is not adequate.

It is the responsibility of those responding to this request to provide information, evidence or exhibits which clearly demonstrates their ability to satisfactorily respond to the requirements of the engagement.

Submittals will be evaluated for its professionalism and thoroughness. Companies should answer all questions in the order presented and provide information as requested.

Companies have the right to take exception to the specifications or terms to this solicitation. Any exceptions taken must be explained in the submittal. Any exceptions that contradict the City's terms and conditions, or contain provisions that are not in the best interest of the City will disqualify the company. If exceptions are not explained, the Company will comply with the specifications as stated in this solicitation.

- 1) Understanding of the project
  - a) Provide information and proposed actions which clearly demonstrates an understanding of the requirements of the project.
- 2) Knowledge of library practices
  - a) Describe your company's knowledge of library operations, library technology, best professional practices and state standards.
  - b) Provide information on projects completed in the last ten years which clearly demonstrates this knowledge.
- 3) Knowledge of library buildings and construction
  - a) Describe your company's knowledge of, and experience with, contemporary library buildings and construction.
  - b) Provide information on projects completed in the last ten years which clearly demonstrates this knowledge.
- 4) Proposed work plan
  - a) Detail the company's methodology for this project, including but not limited to:
    - i) Describe project approach.
    - ii) Describe research methodology to be used to develop the design.
    - iii) Describe how existing workflows and practices will be observed, documented, and improved.
    - iv) Provide objectives and schedule for onsite visits.
    - v) Describe approach to working with staff.
    - vi) Describe approach to soliciting input from the community.
  - b) Describe how cost estimates will be developed.
    - i) Provide information on projects completed in the last ten years that the company developed cost estimates for.
  - c) Provide reports from similar projects you company has completed as samples for review.

- d) Indicate any past or pending litigation.
- 5) Qualifications and experience
- a) Describe experience, skills and expertise doing similar work for other public libraries, including, but not limited to:
    - i) planning needs assessments for library communities
    - ii) developing library building programs
    - iii) calculating project cost estimates.
  - b) Describe company background and qualifications, including the year the company was established, total number of employees and similar data.
  - c) Provide background of personnel that will be assigned to provide this service to the City, include their qualifications and recent similar experience. Identify the individual designated to be the lead on this study.
  - d) Provide the location of office which will be performing work for the City.
  - e) Provide the names of at least three public libraries for which your company has provide the same or similar scope of services within the last ten years. Include the name of the public library, a contact person, their phone number and email address.
  - f) If you will subcontract portions of the work, list all subcontractors to be used. Include company name, address and phone number.
  - g) The City of Santa Cruz has long been an advocate for environmental conservation and sustainable living. Provide information about your company's environmental practices.



## 6: Fee Schedule

### Instructions

Complete this form and submit it in a separate sealed envelope labeled “Fee Schedule for Request for Qualifications for Downtown Library Building Program.”

1. Detail all costs incidental to this project.
2. Break down cost proposal into as many tasks as deemed necessary to clearly present the anticipated level of effort and costs associated with the various activities and deliverables.
3. Provide a current fee schedule which includes hourly rates by job title for company staff and subcontractors.
4. Provide estimated costs for travel expenses.
5. State any and all assumptions, such as the number of meetings to be attended, the tasks to be performed, etc.
6. Describe under what circumstances the City would be charged for additional work.

The fee schedule must include company name and address. It must be signed by an employee authorized to act as an agent for the company.