

REQUEST FOR QUALIFICATIONS (RFQ)

**RFQ 18-02KC:
AS NEEDED PROJECT MANAGEMENT CONSULTING SERVICES**



Procurement Services

***San Diego Unified Port District
1400 Tidelands Avenue
National City, CA 91950***

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**ALL INQUIRIES REGARDING THIS RFQ SHALL BE DIRECTED TO:
Krystal Carranza, Assistant Procurement Analyst
Phone: (619) 686-7244
kcarranza@portofsandiego.org**

KEY RFQ DATES

Issued:	February 6, 2018
Information Exchange Meeting:	February 13, 2018 at 11:00 a.m.
Submit Questions By:	February 21, 2018 at 10:00 a.m.
Submittals Due By:	March 12, 2018 at 10:00 a.m.
Oral Interviews:	April 11, 2018 & April 13, 2018
Tentative Project Start Date:	May 15, 2018

(All Times Listed are Pacific Time Zone)

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I. INTRODUCTION

A. District Background

1. The San Diego Unified Port District (commonly referred to as the "District") is a public benefit corporation established in 1962 by an act of the California State legislature and ratified by the voters of the five member cities of the District. The enabling legislation and subsequent amendments conveyed certain tide and submerged lands within San Diego Bay and the oceanfront within the City of Imperial Beach to a District administration to further the development of commerce, navigation, fisheries and recreation on behalf of the state of California, which owns these lands. The lands are conveyed to the District as a trustee of the state.
2. The District's five member cities are Chula Vista, Coronado, Imperial Beach, National City and San Diego. The District's jurisdiction covers waterfront property within these cities and approximately 2,500 acres of land and 3,400 acres of water.
3. Additional information about the District can be found by visiting its web site at <http://www.portofsandiego.org>

II. SCOPE OF SERVICES

- A. Service Provider to provide as-needed project management, strategic planning, and process improvement services to the District. Services are anticipated to include documentation, schedule management, and the development of procedures associated with the District's 18-month strategic planning process including alignment with the District's budget.
- B. Service Provider may also assist in the establishment of, or in developing recommendations associated with establishing, a Project Management Office with responsibility for the management of scope, schedule, and budget associated with District projects at either the program or portfolio level.
- C. Additional services may include process consulting with an emphasis on process mapping and optimization and coordination with other consultants providing IT-related project management services including the establishment of a technology committee to manage and prioritize IT projects. Service Provider shall be qualified to provide project management services utilizing industry-recognized project management methodologies.



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- D. There is no guarantee that services will be required to the maximum amount of the aggregate agreement(s), or that any of the consultants will be requested to provide any services. Services shall be undertaken only upon issuance of a Task Authorization. A Task Authorization shall not be considered effective until signed by an authorized representative of the District and acknowledged in writing by the firm. Task Authorizations may be negotiated based on a lump sum, fixed fee or time & materials basis.

III. INSTRUCTIONS TO RESPONDENTS

- A. Information Exchange Meeting. The District will conduct an Information Exchange Meeting on **February 13, 2018 at 11:00 a.m.** in the **Training Conference Room** of the San Diego Unified Port District Administration Building, located at 3165 Pacific Highway, San Diego, CA. 92101. The purpose of this meeting is to cover the requirements to submit your submittal, the ADA related requirements and to give a brief review of the Scope of Services. All prospective Respondents are encouraged to attend.
- B. Examination of Submittal Documents. By submitting a submittal, the Respondent represents that it has thoroughly examined and become familiar with the work required under this RFQ, and that it is capable of performing quality work to achieve District's objectives.
- C. Questions. Questions or comments regarding this RFQ must be submitted electronically to our eBid system where the RFQ was downloaded and must be received by District no later than **February 21, 2018, at 10:00 a.m.** All electronic questions must be received by the date stated above. Responses from District will be communicated via the electronic eBid system to all recipients of this RFQ. Inquiries received after the date and time stated above will not be accepted.
- D. Addenda. If changes to the RFQ are required, the District will issue an addendum to all Respondents via the eBid system. All Respondents will receive an email notifying them that an addendum has been issued. All Addenda, if any, must be acknowledged via eBid system.
- E. Electronic Submission of Submittals
1. All Respondents are required to submit their submittals electronically via the electronic eBid system they downloaded this RFQ. The maximum file size for submittal is 50 megabytes, and the file type shall be Portable Document Format (PDF). The electronic system will close submission exactly at the date and time set forth in this RFQ or as changed by addenda. An



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electronic copy of the firm's submittal must be attached to the electronic system.

2. Respondents are responsible for submitting and having their submittal accepted before the closing time set forth in this RFQ or as changed by addenda. NOTE: Pushing the submit button on the electronic system may not be instantaneous; it may take time for the Respondent's documents to upload and transmit before the submittal is accepted. It is the Respondent's sole responsibility to ensure their document(s) are uploaded, transmitted, and arrive in time electronically. The District will have no responsibility for submittals that do not arrive in a timely manner, no matter what the reason.

F. Required Documents

1. The submittal shall contain the following items in order a. through e. and placed at the front of the submittal:
 - a. Response Cover Letter
 - b. Respondent's Sub-Service Providers – Attachment A
 - c. Fee Schedule Form - Attachment B
 - d. Statement of Qualifications - Attachment C
 - e. Exceptions to the Agreement – Attachment D
2. The District will conduct a preliminary review of the submittals to determine if the above items and copies are included as required in the RFQ. If a submittal does not include all items fully completed, the submittal may be considered not responsive.
3. If claiming Equal Opportunity Program Bonus Points please include the following:
 - a. Equal Opportunity Program Bonus Points – Attachment E (Use Attachment A for SBE Bonus Points)
4. Response Cover Letter
 - a. The Respondent shall submit a response cover letter that summarizes why the Respondent believes they should be selected by the District to provide As Needed Project Management Consulting Services within the jurisdiction of the San Diego Unified Port District in the cities of Chula Vista, Coronado, Imperial Beach, National City and San Diego, California.



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- b. The San Diego Unified Port District has implemented an Enterprise Wide software program that has a vendor registration component. All Service Providers are encouraged to register and any Service Providers doing business with the District are required to register. To register with the District as a Vendor, please visit our website, www.portofsandiego.org, click on Business/Register as a Vendor. For questions and/or comments, please contact the District's Procurement Services Section at 619-686-6392.
- c. The Respondent shall provide in the Response Cover Letter the name of the authorized representative who has the authority to enter into a binding agreement and authorize changes to the scope, terms, and conditions of the agreement if selected. The information should include: Name and Title, Name of Firm, Address, City, State, Zip, Telephone number, Fax number, and E-Mail address.

G. Agreement Type

1. The Agreement services shall be compensated on a negotiated basis as established in the Fee Schedule. The anticipated start date is May 15, 2018.
2. An example of the Service Agreement to be executed with the successful Respondent can be found at the District's website, <http://www.planetbids.com/portal/portal.cfm?CompanyID=13982#> Respondents shall be prepared to accept the terms and conditions stated in this RFQ, Scope of Services, Insurance, Indemnity, and the Sample Agreement. If a Respondent desires to take exception to the Agreement, Respondent shall provide the following information in their Response Cover Letter, identified as "Exceptions to the Agreement." At the discretion of the District, exceptions not called out in the Cover Letter will not be negotiable after the due date for submission of submittals/qualifications.
 - a. Respondent shall clearly identify each proposed change to the Agreement, including all relevant Attachments.
 - b. Respondent shall furnish the reasons therefore as well as specific recommendations for alternative language.
3. The above factors will be considered in evaluating submittals. Submittals that take exceptions to the Agreement or proposed compensation terms may be determined by District, at its sole



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discretion, to be unacceptable and no longer considered for award.

H. Rights of District

1. This RFQ does not commit the District to enter into an Agreement, nor does it obligate the District to pay for any costs incurred in preparation and submission of submittals or in anticipation of an Agreement. District may investigate the qualifications of any Respondent under consideration, require confirmation of information furnished by the Respondent, and require additional evidence or qualifications to perform the Services described in this RFQ.
2. District reserves the right to:
 - a. Reject any or all submittals.
 - b. Issue subsequent Requests for Qualifications.
 - c. Postpone opening for its own convenience.
 - d. Remedy technical errors in the Request for Qualifications process.
 - e. Approve or disapprove the use of particular Respondent's Sub-Service Providers.
 - f. Negotiate with any, all, or none of the Respondents.
 - g. Solicit best and final offers from all or some of the Respondents.
 - h. Award an Agreement to one or more Respondents.
 - i. Accept other than the lowest offer.
 - j. Waive informalities and irregularities in submittals.

I. Collusion. By submitting a submittal, each Respondent represents and warrants that its submittal is genuine and not a sham or collusive or made in the interest of or on behalf of any person not named therein; that the Respondent has not directly or indirectly induced or solicited any other person to submit a sham submittal, or any other person to refrain from submitting a submittal; and that the Respondent has not, in any manner, sought collusion to secure any improper advantage over any other person submitting a submittal.

J. Withdrawal of Submittals. A Respondent may withdraw their submittal before the expiration of the time for submission of submittals by going to the eBid system and removing their submission.

IV. RESPONDENTS' MINIMUM QUALIFICATIONS



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- A. General Qualifications. The Respondent shall have sufficient experience in and comprehensive knowledge of As Needed Project Management Consulting Services as described in the Scope of Services.

V. SUBMITTAL FORMAT AND CONTENT

A. Format

1. Respondents shall include the required items stated in Section III Instructions to Respondents, Paragraph F, Required Documents.
2. Submittals shall be (1) typed, (2) as brief as possible, and (3) not include any unnecessary promotional material.
3. For ease of handling, it is requested that standard 8 -1/2 x 11" paper be used and that the submittal shall be submitted in Portable Document Format (PDF) format. **THE SUBMITTAL SHALL BE ONE DOCUMENT ONLY.**
4. The nature and form of response are at the discretion of those responding, but shall include the information listed below.

B. Content

1. Experience of Proposed Staff. Resume and experience of project managers and coordinators who would be assigned to this project;
 - a. Indicate the extent of training the members of the Team have received in the areas of Project Management Consulting Services and working with Government entities.
 - b. Provide examples of where the proposed team members have been assigned to similar projects.
 - c. Sub-Service Provider qualifications and roles, if any.
 - d. Identify which services would be provided by in-house resources and those provided by Sub-Service Provider. Respondent must present an organizational chart of its planned staff (internal and external) including resumes, biographies, and curriculum vitae where appropriate.
 - e. The Respondent shall discuss how they would staff this project. The Respondent shall identify project team members by name, location, specific responsibilities on the



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project and the estimated person-hours of participation. The Respondent shall include an organizational chart for the project team and resumes for key personnel. The Respondent's key personnel will be an important factor considered by the Selection Review Panel. There can be no change of key personnel once the proposal is submitted, without the prior approval of District.

2. Approach to the Project. The Respondent shall present a well-conceived work plan that establishes the Respondent's understanding of, and ability to satisfy, District's objectives and work requirements. Respondent shall succinctly describe the proposed approach for addressing the required work, outlining the activities that would be undertaken in completing the various tasks, and specifying who would perform them. Include a timetable for completing all work specified in the Scope of Services. The Respondent may also suggest technical or procedural innovations that have been used successfully on other projects and which may facilitate the completion of this project.
3. Capability to Perform
 - a. Ability to complete work within required time. Availability and continuity of staff during course of the project.
 - b. This section shall include a brief description of the Respondent and Sub-Service Provider's qualifications and previous experience on similar or related projects. Description of pertinent project experience shall include a summary of the work performed, the total project cost, the percentage of work the firm was responsible for, the period over which the work was completed, and the name, title, and phone number of clients to be contacted for references. Give a brief statement of the firm's adherence to the schedule and budget for each project.
4. Firm's Relevant Experience. The Respondent should describe its relevant experience in each of the following areas:
 - a. Description of Project Management Consulting Services similar to those proposed above, and with ongoing appropriate contracts to agencies of comparable size to the District.
 - b. Experience in each of the areas noted in the Scope of Services.



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- c. This section shall include a brief description of the firm's size as well as the local organizational structure; and a discussion on the firm's financial stability, capacity, and resources. Additionally, this section shall include a listing of any lawsuit or litigation and the result of that action resulting from (a) any public project undertaken by the Respondent or by its Sub-Service Providers where litigation is still pending or has occurred within the last five years or (b) any type of project where claims or settlements were paid by the Respondent or its insurers within the last five years.

5. Cost/pricing Information

- a. Respondent shall submit Attachment B form in their submittal.
- b. The District reserves the right to consider the financial responsibility and general complexity of each respondent, as well as its reputation within the industry to determine if the respondent has the apparent ability to meet and complete successfully the requirements of the work. Upon request, the respondent shall provide a financial statement, audited if necessary, in addition to any other information requested by the District.

VI. EVALUATION AND SELECTION

- A. Evaluation Criteria/Matrix. The following criteria and matrix shall be used to evaluate submittals:

1. Experience of Proposed Staff. Experience of Project Manager and Coordinator with similar scope of services. Experience of project team with similar scope of services. Years staff has been assigned to similar scope of services. Level of education, training, licensing. Certification of staff. Respondent's Sub-Service Provider qualifications and roles, if any.
2. Approach to the Project. Demonstrated understanding of the District's needs and solicitation requirements. Approach is well organized and presented in a clear, concise and logical manner. Availability and proposed use of technology and methodologies. Quality control and thoroughness is well defined.
3. Capability to Perform. Ability to complete work within deadlines. Availability and continuity of staff during the course of the agreement, if selected. Unsatisfactory past performance with the



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District may be considered as determined by the District in its sole and absolute discretion. Such determination may be based on Cure Notices, Performance Deficiency Notices, Termination Letters, or such other oral or written evidence of performance as the District may deem relevant from time to time in making such determination.

4. Firm's Relevant Experience. Experience in performing similar services for organization of similar size to the District. Experience with public agencies. Years of experience with these types of services.
 5. Fair and Reasonable Cost. Reasonableness of labor rates submitted and competitiveness of these rates with other rates submitted;
- B. Equal Opportunity Program Bonus Points: The following criteria shall be used to evaluate respondent's Equal Opportunity Program based on specific criteria identified below. Respondents shall be eligible for bonus points on the following criteria: ADA Scope Enhancement, Staffing, Veterans Staffing, and Small Business Enterprise (SBE) Participation. Respondents can receive up to 20 total bonus points under the Equal Opportunity Program.
1. ADA Scope Enhancement: The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has included ADA Enhancements that are above the minimum requirements and within the scope of services, including taking into consideration Universal Design. The respondent shall submit written documentation to support their ADA Enhancements for District's review and consideration.
 2. Staffing. The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has staff with disabilities as defined by the ADA, or that has included one or more Disabled Veteran Business Enterprise (DVBE) subcontracting firm(s). The respondent shall submit DVBE certification documentation and list workforce data reporting number of total employees with disabilities as defined by the ADA.
 3. Veteran's Status. The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has Veteran's status or has staff with Veteran's status. Documentation of a firm's Veteran's status must be provided or workforce statistical data reporting number and percentage of total employees with Veteran's status is required.



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4. Small Business Enterprise (SBE) Participation (See Section VII.C.4.) The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has SBE status. Documentation of a firm's SBE status must be provided on Attachment for Respondent's Sub-Service Providers

C. Evaluation Procedure

1. A Selection Review Panel, generally made up of District staff, will review the submittals and establish a list of finalists based on pre-established review criteria. The names of the Selection Review Panel members are not revealed prior to the interviews. The Selection Review Panel may interview the finalists. If interviews are conducted, the respondent should allow approximately 1 hour for the oral interview and a question and answer session. The Project Manager must lead a 10 minute presentation before the Selection Review Panel.
2. Interviews may be conducted on **April 11, 2018** and **April 13, 2018**. Each Respondent is asked to keep these dates open. No other interview dates will be provided.
3. The Selection Review Panel will evaluate the submittals. The rating and evaluation forms prepared by Panel members will not be revealed. The scores in the evaluation matrix shown below **DO NOT** indicate a "winning score" and the highest score is not guaranteed selection. The final decision is at the discretion of the District and is based on the scores, reference checks, negotiated pricing, and further analysis of the submittals including any risks associated with selecting any submittal.

Evaluation Criteria	Weight	Firm A		Firm B		Firm C	
		Score	Total	Score	Total	Score	Total
Experience of Proposed Staff	10						
Approach to the Project	9						
Capability to Perform	8						
Firm's Relevant Experience	6						
Fair and Reasonable Cost	5*						
Totals							
ADA Scope Enhancement							
DVBE/Disabled Staff							
Veterans Status							
SBE Participation							



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Grand Total					
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* The Fair and Reasonable Cost criteria weight shall always be one point below the lowest weighted evaluation criteria

- D. Award. When the Selection Review Panel has completed its work, the District may negotiate for the extent of services to be rendered and the method of compensation. Because District may award without conducting negotiations, the submittal submitted shall contain the Respondent's most favorable terms and conditions.

VII. EQUAL OPPORTUNITY PROGRAM REQUIREMENTS

A. Equal Opportunity Contracting Policy Statement

1. It is the policy of the San Diego Unified Port District (District) that all businesses be provided equal opportunity to participate in the performance of District contracting and leasing opportunities, and to insure that, workers on public works projects of one thousand dollars (\$1,000) or more are paid the general prevailing rate of per diem wages for regular, holiday, and overtime work as provided by California Labor Code Section 1771.
2. The District is committed to take all necessary and reasonable steps to increase its utilization of small businesses for a positive economic impact to the region. District policy prohibits discrimination against any person because of age (over 40), ancestry, color, disability (mental or physical), gender, marital status, medical condition, national origin, pregnancy, race, religion, sexual orientation, or veteran status, in the award or performance of District contracts or leases.
3. The District will create a level playing field on which small businesses can compete fairly for District contracts. This policy will help remove barriers to the participation of small businesses in District contracts and assist in the development of firms to compete successfully in the marketplace outside the District's Equal Opportunity Contracting Program.

B. Americans with Disabilities Act Requirements

1. Americans with Disabilities Act (ADA) Policy
 - a. The San Diego Unified Port District (District) does not discriminate on the basis of disability in employment and complies with the ADA, and all other applicable federal, state, and local laws, regarding barrier-free access to all



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District services, programs, and activities.

- b. In conjunction with BPC Policy No. 361, it is the District's policy not to discriminate against qualified individuals with disabilities in regard to application procedures, hiring, advancement, discharge, compensation, training, or other terms, conditions, and privileges of employment.
- c. An individual with a disability, who can be reasonably accommodated for a job, without undue hardship to the District, will be given the same consideration for that position as any other applicant. Additionally, the District will engage in an interactive process to attempt to reasonably accommodate qualified individuals with disabilities so they can perform the essential functions of a job. All employees are required to comply with safety standards.
- d. The District is committed to ensure all services, programs, and activities are accessible and usable by all individuals except where to do so would result in a fundamental alteration in the nature of the service, program or activity, or in undue financial and administrative burdens.
- e. To ensure high visibility, the District will participate in community outreach events, report on activities that further enhance accessibility, and consider the use of Universal Design, which is the design of products and environments to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design, to support and include people with disabilities in all services, programs, and activities as appropriate.
- f. In conjunction with BPC Policy No. 361, the District will promptly investigate all complaints of employment discrimination and barriers to services, programs, and activities, and when appropriate, take effective remedial action to address and remedy any complaints.
- g. The Executive Director will designate person(s) responsible for developing and implementing the District's ADA program and ensuring that District employees, agents, lessees, and Service Providers adhere to the provisions of the ADA program.



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- h. The ADA program will be implemented at the same priority as compliance with all other legal obligations incurred by the District.

C. Small Business Enterprise (SBE) Participation

1. **NO SBE participation goal** was established for this opportunity. Should sub-participants be utilized, respondent should make good faith efforts to include small businesses in their solicitation process. SBE eligibility is based on economic size standards determined by number of employees or gross receipts. The SBE Plan recognizes both federal and state size standards for small businesses. Small business concerns can be certified as SBEs by the U.S. Small Business Administration, State of California, Department of General Services, or any U.S. Department of Transportation, Disadvantaged Business Enterprise (DBE) certification using Title 49 Code of Federal Regulations Part 26 criteria.
2. The District's Small Business Enterprise Program utilizes external resources in their search for small businesses to participate on contract opportunities. This information is maintained and updated by those sources and their registered clients. Businesses that are registered within these data sources claim they meet the federal or state size standards to qualify as a small business. Please be aware that the District's Small Business Enterprise program does not control or guarantee the accuracy, or completeness of this outside information. Questions regarding a small business size protest should be addressed with the outside source.

NOTE: Equal Opportunity Contracting Certified Small Business data resources are available at www.portofsandiego.org. Click on the Business Tab, then, click on the Equal Opportunity Contracting Information "link", scroll down to the SBE resource links. Click on any of the three (3) SBE database resource links. This will provide you with small business sub-participants to contact for sub-contracting opportunities on specific work categories pertaining to this project. If you do not have access to the Internet, please contact Equal Opportunity Contracting in the Human Resources Department at (619) 686-7245.

3. Required SBE Sub Participation Information. Respondent must list all proposed Sub-Service Providers on the enclosed Respondent's Sub-Service Providers form. If any of your sub Service Providers are certified SBE, please provide a copy of their certification.



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4. SBE Participation: The District shall award five (5) bonus points to a firm's total score of the evaluation criteria/matrix when the Respondent is certified as a Small Business Enterprise (SBE), as defined by the Small Business Administration (SBA), or is utilizing one or more SBEs to perform the work required under the agreement. Respondent shall provide SBE verification for their firm and any SBE sub participants to ensure that firms receiving bonus points are eligible.
- D. Equal Employment Opportunity Policy Statement. It is the policy of the San Diego Unified Port District (District) that all Service Providers and lessees interested in conducting business with the District shall not discriminate against any employee or applicant for employment because of age (over 40), ancestry, color, disability (mental or physical), gender (including identity, appearance, or behavior, whether or not that identity, appearance, or behavior is different from that traditionally associated with the person's sex at birth), marital status, medical condition, national origin, pregnancy, race, religion, sexual orientation, or veteran status, and shall take action to assure applicants are employed, and that employees are treated during employment, without regard to age (over 40), ancestry, color, disability (mental or physical), gender (including identity, appearance, or behavior, whether or not that identity, appearance, or behavior is different from that traditionally associated with the person's sex at birth), marital status, medical condition, national origin, pregnancy, race, religion, sexual orientation, or veteran status.
- E. Equal Employment Opportunity Program Information
1. As prescribed under Board Policy 358, the District requires all consultants, vendors, contractors and lessees to comply with all applicable Federal, State, and local law or regulation relating to equal employment opportunity and nondiscrimination, including any such law, regulation, and policy hereinafter enacted for the promotion of equal employment opportunities and nondiscrimination.
 2. Questions regarding Section VII or Americans with Disabilities Act Requirements of this opportunity should be directed to:

Shirley Hirai, Equal Opportunity Manager
Human Resources
Phone: (619) 686-7245
E-mail: shirai@portofsandiego.org



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VIII. INDEMNIFY, DEFEND, HOLD HARMLESS. Respondent will indemnify the District as stated in the Sample Agreement, Paragraph 9.

IX. INSURANCE REQUIREMENTS. Respondent and each Respondent's Sub-Service Provider will at all times during the term of this Agreement maintain, at its expense, the minimum levels and types of insurance as stated in the Sample Agreement, Paragraph 10:

X. PROTESTS

- A. Prior to the closing date for submittal of submittals, Respondent may submit to District protests regarding the procurement process, or alleged improprieties in specifications or alleged restrictive specifications. Such protests shall be filed no later than 10 working days prior to the scheduled closing date. If necessary, the closing date of the solicitation may be extended pending a resolution of the protest. Protests dealing with alleged improprieties in the procurement or the procurement process that can only be apparent after the closing date for receipt of submittals shall be filed within five (5) working days of issuance of the Notice of Recommended Award. Protests shall contain a statement of the grounds for protests and supporting documentation. Protestor will be notified of District's final decision prior to issuance of Award.
- B. A Respondent may discuss the procurement documents with District. Such discussions, however, do not relieve Respondents from the responsibility of submitting written protests as required.
- C. Requests and protests shall be addressed to: San Diego Unified Port District, Attn: Matt Earle, Chief Procurement Officer, 1400 Tidelands Avenue, National City, CA 91950.

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ATTACHMENT A
RESPONDENT'S SUB-SERVICE PROVIDERS
San Diego Unified Port District

Name and Address of Sub-Service Provider	Type of Service	SBE Type (DBE, WBE etc.)	*Certifying Agency	**Percent of Service	Dollar Value of Services

* Must provide copy of SBE Certification.

**Must provide percentages of work to be subcontracted. If unknown, what is your overall percentage for all subs combined for the project?

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ATTACHMENT B
FEE SCHEDULE
San Diego Unified Port District

Respondent shall list labor rates for the labor classifications that most closely match the descriptions listed in Exhibit A. Only the labor rates for the labor classifications in Exhibit A will be used for evaluation in the Fair and Reasonable Cost evaluation criteria.

LABOR CLASSIFICATION*	POSITION TITLE**	FULLY BURDENED HOURLY BILLING RATE
1. Senior Project Manager		\$
2. Project Manager		\$
3. Project Coordinator		\$

* Descriptions for the classifications listed above, numbered 1 through 3, are attached as **Exhibit A**.

** Position Title is to be the position title within the Respondent's organization.

*** Additional classifications may be provided later for the Agreement that may result from this Solicitation.

Note: Do not modify the Fee Schedule. Doing so may result in your response being disqualified and deemed non-responsive.

Signature of Authorized Representative

Date



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The below allowable and non-allowable costs pertain to Time & Material.

<u>Allowable Overhead Costs:</u>	<u>Costs Not Allowed</u>
Payroll Additives: Sick Leave Vacation Holiday Pay Medical Insurance Term Life Insurance Disability Insurance Federal Unemployment Tax Federal & State Payroll Tax Workers' Compensation Insurance Union Fringe Benefits Excise Tax Social Security Retirement Benefits (401-K)	Payroll Additives: Bonuses Salary Incentives Stock Options Severance Life Insurance Annuity Contracts
G&A Overhead: Indirect Salaries Indirect Additives (see above list) Utilities Rent & Depreciation Office Supplies Professional Fees/Licenses Library/Periodicals Administrative Meetings Technical/Professional Meetings Legal Costs Accounting Costs Insurance Costs Telephone (local) Postage (routine) Office Machines, Computers & Software Costs Repairs & Maintenance Personnel Recruiting & Training Reproduction Costs/Deliverables Advertising - Personnel Recruitment Only Business License Automobiles - Leasing/Repairs Field Supplies/Equipment Professional Liability Insurance Project Proposal Development Expenses Cost of Money (Interest on borrowed capital) Bonding (if required by contract)	G&A Overhead: Promotional Advertising Bad Debts Entertainment Research & Development Fines & Penalties Idle Facilities Costs Lobbying Carry-over losses from other contracts Litigations or Cost/Damage Awards Costs for Equipment that is a direct cost chargeable under the terms of the Agreement Building Depreciation in excess of 2% Equipment Depreciation in excess of 10%

ATTACHMENT C
STATEMENT OF QUALIFICATIONS
San Diego Unified Port District

By submission of a response, the Respondent authorizes the District to make any inquiry or investigation it deems appropriate to verify or augment the information contained in this questionnaire, and authorize others to release to the District any and all information sought by District in such inquiry or investigation.

Company or Organization Name

Name, Title	Tel. No.	Email
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Street	City	State	ZIP
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Name, Title	Tel. No.	Email
-------------	----------	-------

Street	City	State	ZIP
(IF DIFFERENT THAN ADDRESS STATED ABOVE)			

() Sole Proprietorship
() Partnership
() Corporation – STATE OF INCORPORATION: _____
() Joint Venture
or Explain if necessary:

I, _____, affirm that all the information furnished in and with this questionnaire, is true, complete and correct to the best of my knowledge.

(Signature)

(Date)



RFQ 18-02KC
AS NEEDED PROJECT MANAGEMENT CONSULTING SERVICES

MINIMUM QUALIFICATIONS

Firms submitting submittals should meet the following minimum qualifications. Please answer “yes” or “no”, and include an explanation, As Needed.

1. Respondent has a liability insurance policy with a policy limit amount as required on the Sample Agreement or a statement from their broker that the Respondent can have such insurance in place after notice of award.

☐ **Yes** ☐ **No**

2. Respondent has current workers’ compensation insurance policy as required by the Labor Code or is legally self-insured pursuant to Labor code section 3700 ET. Seq. or is exempt because Respondent has no employees. Respondent has continuously had workers’ compensation insurance or state approved self-insurance.

☐ **Yes** ☐ **No** ☐ **Exempt**

3. Respondent has automobile liability insurance policy with a policy limit of at least \$1,000,000 per claim or a statement from their broker that the Respondent can have such insurance in place after notice of award.

☐ **Yes** ☐ **No**

4. At any time during the last five years, has your firm, or any of its owners or officers been convicted of a crime involving the bidding, awarding or performance of a government contract or agreement?

☐ **Yes** ☐ **No**

5. Is your firm currently in a bankruptcy case, in Chapter 11, an applicant for Chapter 11, or an adjudicated bankrupt?

☐ **Yes** ☐ **No**



RFQ 18-02KC
AS NEEDED PROJECT MANAGEMENT CONSULTING SERVICES

SPECIAL QUALIFICATIONS

Respondents should provide the following information relevant to its operations as the basis for evaluation:

6. OTHER REQUIRED RESPONSE INFORMATION

A. REFERENCES

Provide a list, including names, addresses, and phone numbers of at least three (3) clients that your firm has served within the last two (2) years with a scope of service similar to this RFQ. Include a statement authorizing the District to contact such clients for an appraisal of the services they received from your firm.

B. PENDING LITIGATION

Are you, or any of the principals in your organization holding more than a 10% interest, presently a party to any pending litigation, liens, claims or judgments?

☐ **Yes** ☐ **No**

If yes, provide detailed information for each action.

C. CONFLICT OF INTEREST

Does the company have any existing or potential conflicts of interest with the District?

☐ **Yes** ☐ **No**

If yes, attach a statement detailing the conflicts of interest.

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RFQ 18-02KC
AS NEEDED PROJECT MANAGEMENT CONSULTING SERVICES

ATTACHMENT D
EXCEPTIONS TO AGREEMENT
San Diego Unified Port District

Exceptions to the Agreement. If Respondent takes exception to the Sample Agreement, the Respondent must state the reason for the exception and state the specific proposed Agreement language to include in place of the provision. At the discretion of the District, exceptions not called out here will not be negotiable after the due date for submission of responses.

1. Exceptions. Respondent to identify if they take exception to the Sample Agreement:

EXCEPTIONS <input type="checkbox"/>	NO EXCEPTIONS <input type="checkbox"/>
--	---

2. Exceptions. If Respondent has exceptions to the Sample Agreement, please provide in the preferred format below.

Agreement Provision to which exception is taken	Reason for Exception	Proposed Agreement Language

Name of Respondent (Company) _____

Signature

Date

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RFQ 18-02KC
AS NEEDED PROJECT MANAGEMENT CONSULTING SERVICES

ATTACHMENT E
EQUAL OPPORTUNITY PROGRAM BONUS POINTS
San Diego Unified Port District

ADA SCOPE ENHANCEMENT: The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has included ADA Enhancements that are **OVER AND ABOVE MINIMUM REQUIREMENTS AND WITHIN THE SCOPE OF SERVICES**, including taking into consideration Universal Design. The respondent must submit written documentation to support their ADA Enhancements for the District's review and consideration.

Is your firm proposing ADA enhancements within the scope of services for the added bonus points? Yes ___ No ___

May include, but not be limited to the following **examples** listed below:

- Incorporation of Universal Design
- Review by recognized ADA committee or organization
- ADA outreach
- Wider sidewalks as applicable
- More disabled parking as applicable
- Features such enhanced Crosswalks (latest technology)

RESPONDENT'S ADA PROGRAM AS PER THIS SCOPE OF SERVICE: _____



RFQ 18-02KC
AS NEEDED PROJECT MANAGEMENT CONSULTING SERVICES

STAFFING: The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has staff with disabilities as defined by the ADA, or that has included one or more Disabled Veteran Business Enterprise (DVBE) subcontracting firm(s). The respondent **MUST** submit DVBE certification documentation and workforce statistical data reporting number and percentage of total employees with disabilities as defined by the ADA.

Acceptable Agency DVBE Certification documentation: Central Contractor Registration (CCR) or State of California Department of General Services (DGS)

Is your firm claiming DVBE or Staffing bonus points? Yes___ No___

Please complete workforce statistical data:

Job Group	Disabled Staff	
	<u>#</u>	<u>%</u>
Officials/Managers		
Professionals		
Technicians		
Sales Workers		
Admin Support		
Craft Workers		
Operators		
Laborers		
Service Workers		
Total:		



RFQ 18-02KC
AS NEEDED PROJECT MANAGEMENT CONSULTING SERVICES

VETERAN'S STATUS: The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has Veteran's status or has staff with Veteran's status. **Documentation of a firm's Veteran's status is acknowledged through the firm's good faith by completing the statistical data report listed below.**

Is your firm claiming Veteran's Status bonus points? Yes___ No___

Please complete workforce statistical data:

Job Group	VETERANS STATUS	
	#	%
Officials/Managers		
Professionals		
Technicians		
Sales Workers		
Admin Support		
Craft Workers		
Operators		
Laborers		
Service Workers		
Total:		

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RFQ 18-02KC
AS NEEDED PROJECT MANAGEMENT CONSULTING SERVICES

EXHIBIT A
LABOR CLASSIFICATION DESCRIPTIONS
San Diego Unified Port District

Labor Classification	Description
1. Senior Project Manager	A staff person with more than 10 years of experience in a project management role who acts as the point of contact for the client and is responsible for all of the day to-day progress of the project. The Senior Project Manager is capable of managing large, complex projects with a high degree of controversy. The Senior Project Manager is responsible for the overall performance of the work and service to the client.
2. Project Manager	A staff person with more than 5 years of experience in a project management role who acts as the secondary point of contact for the client. The Project Manager is capable of managing medium to large, semi-complex projects with a moderate degree of controversy. The Project Manager regularly checks in with the Senior Project Manager on project status.
3. Project Coordinator	A staff person responsible for coordinating projects of varying size and complexity or its parts. Project Coordinator is responsible for organizing and controlling project activities and for communicating risks, opportunities and current state of project to his superior and/or other stakeholders.