

Design/Build Entity Services for OCERS New Headquarters Building Project

Request for Qualifications (RFQ)

December 2023

Orange County Employees Retirement System (OCERS)

PO Box 1229

Santa Ana, CA 92702 USA

(714)-558-6200

<http://www.ocers.org>

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Section 1: Introduction

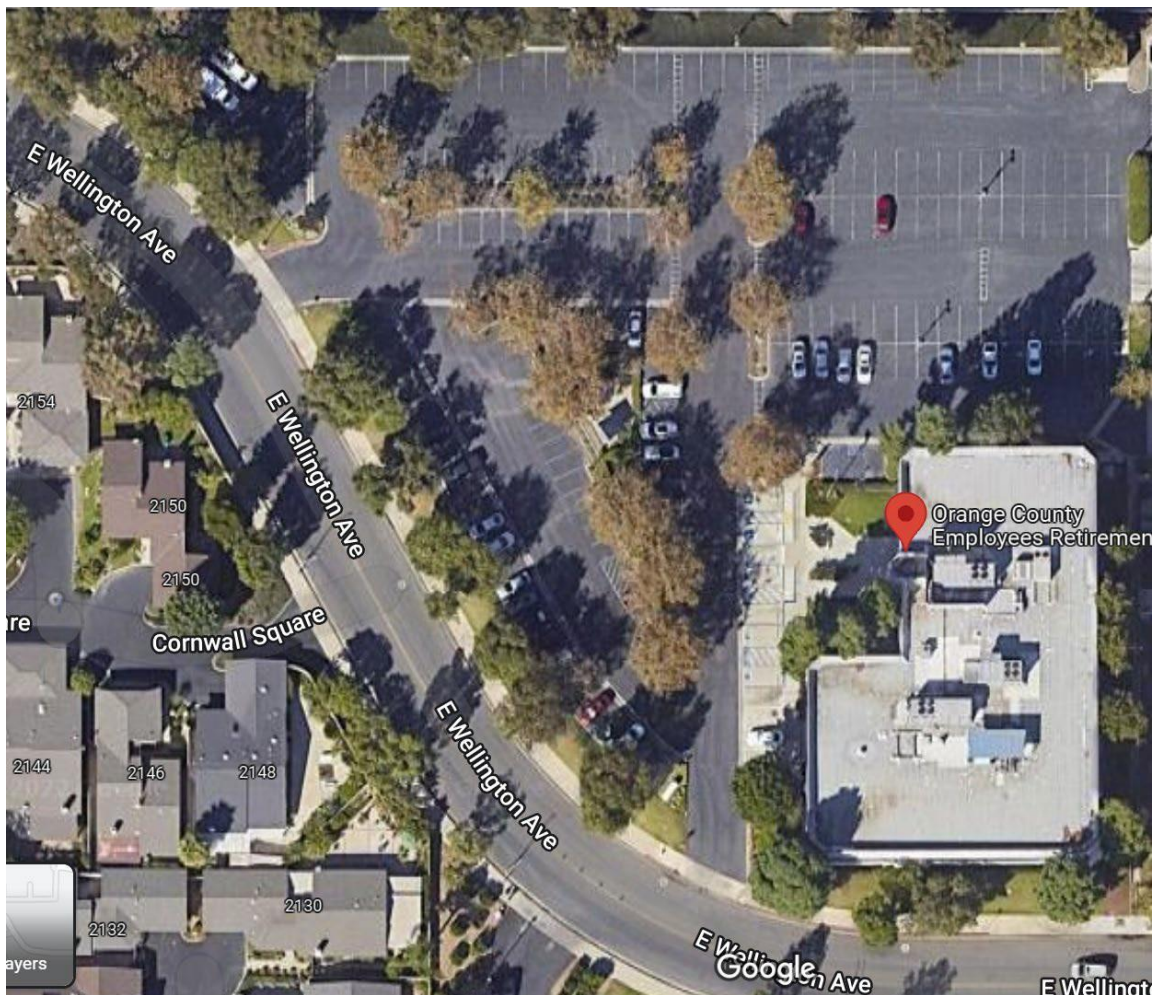
The Orange County Employees Retirement System (OCERS) was established in 1945 under the provisions of the County Employees Retirement Law of 1937 and provides its 50,000 active and retired members with retirement, disability, death, and cost-of-living benefits.

It is governed by a ten-member Board of Retirement (“Board”), which has plenary authority and fiduciary responsibility for the investment of money and administration of the retirement system. It operates as a cost-sharing multiple-employer defined benefit pension plan for thirteen active Orange County participating employers. The OCERS Chief Executive Officer is appointed by the Board to manage and be responsible for OCERS’ operations handled by its 100+ staff employees, consultants, and contractors.

For additional information about OCERS, please refer to the OCERS website at ocers.org.

Section 2: Project Background

OCERS’ employees and operations are currently housed in its headquarters building at 2223 E. Wellington Avenue, Santa Ana, CA 92701. The site (Wellington Property) consists of a 3-story 50,000 SF office building that was built in 1979 on an irregular-shaped 2.92-acre parcel with ample surface parking.



OCERS, in February 2020, acquired the adjoining property located at 1200 N. Tustin Ave, Santa Ana, CA 92705 (Tustin Property) to the immediate east of the Wellington Property for future purposes. This property consists of a 30,000 SF 2-story medical office building on a 2.77 acre rectangular-shaped parcel with ample surface parking.



With OCERS' projected growth in employee count from its current 120 to a potential 190 within the next few years to meet the work demands from the continued membership increase, OCERS began its strategic planning to construct a new HQ building on the Tustin Property (Project).

The Project will consist of an office building of between 65,000 and 80,000 usable square feet including a Board Room with seating capacity for approximately 120 persons, including the dais and staff. Parking is expected to be surface. OCERS has engaged an Owners' Representative/Project Manager, Griffin Structures, and will be undertaking the Project using the progressive design build delivery method. The current estimated budget for the Project is between \$55M and \$80M.

Section 3: RFQ Purpose/DBE Selection Process

The purpose of this RFQ is to invite firms/teams interested in becoming the Design/Build Entity (DBE) (consisting of at least one licensed general contractor and one licensed architect in order to respond to this RFQ) for design, permitting, and construction of the OCERS replacement headquarters building. OCERS will be undertaking selection of the DBE in a two-step process, with this RFQ as the first step and a second more detailed Request for Proposal as step two. Interested teams are to submit their qualifications in response to this RFQ so that OCERS may evaluate and rank the responses to the RFQ in order to determine the short list of the highest-ranked DBE teams who will be invited to participate in the upcoming RFP for potential award of a contract for DBE services for the Project. OCERS may invite up to five of the highest-rated teams responding to this RFQ to participate in the RFP process.

Section 4: Project Tasks

The DBE ultimately selected through the RFP process will, directly and indirectly, provide all materials, labor, tools, equipment, and services, as well as the bidding, vetting, awarding, and managing of sub-consultants and sub-contractors as required under a Design/Build Guaranteed Maximum Price (GMP) contract with OCERS to complete the following tasks and activities:

- Siting
- Agency(ies) Entitlement Planning and Processing
- Applying for and securing all environmental clearances and approvals
- Permitting
- Designing
- Coordinating
- Constructing
- Sub-contracting
- CM Services
- Commissioning
- LEED Verifying
- Warranty

Section 5: Statement of Qualifications (“SOQ”) Contents

The SOQ shall, at a minimum, include the following:

A maximum of 50 pages, 1-sided, excluding covers, with a font size no smaller than 12-point.

- The DBE team’s proposed licensed general contractor/firm and the proposed licensed architect/design firm
- Details of each the DBE team member firms’ main lines of work.
- Details of a minimum of five (5) projects completed by respondents within the last six (6) years of similar use and size (60,000 SF to 100,000 SF). Design build projects completed by the same DBE team will be given higher weight in the scoring. In addition, please provide the following details for each of the projects provided for each DBE team member:
 - scope of work.
 - building(s) square footage(s) and building type.
 - pre-construction cost estimate vs the as-built final cost (to the nearest \$1M).
 - planned and actual milestone timelines.
- The Team’s Entitlement experiences.
- The Team’s resources and key staff that would be assigned to the Project along with detailed resumes.
- Completion of the questionnaire attached as Attachment 1 with qualifying responses.

Section 6: SOQ Submittal Instructions and Questions

The firms wishing to be considered for qualification for the short list to continue onto the RFP phase shall submit their SOQ in electronic format to OCERS via PlanetBids or to the contact referenced below no later than January 19, 2024:

Jim Doezie
Contracts, Risk & Performance Administrator
jdoezie@ocers.org
PO Box 1229
Santa Ana, CA 92702

The following timetable constitutes a tentative schedule for this RFQ process. OCERS reserves the right to modify this schedule at any time.

Deliverable	Date	Time
Release of RFQ	Dec 15, 2023	5:00 p.m. PST
RFQ Questions Deadline	Jan 11, 2024	5:00 p.m. PST
RFQ Answers Posted	Jan 16, 2024	5:00 p.m. PST
RFQ Submission Deadline	Jan. 19, 2024	5:00 p.m. PST
OCERS Review of RFQ Submissions	To be determined	
Shortlist of Finalists to Continue Onto the RFP	To be determined	

OCERS plans to issue the RFP for the Project shortly after its shortlisting of RFQ finalists.

Section 7: SOQ Review Process

All SOQs will be reviewed and shortlisted by a panel of subject matter experts for conformance to these Instructions, Completeness, and Relevancy to the OCERS Project.

OCERS staff and/or a selection committee will review all submitted SOQs. OCERS is following a 2-step approach for selecting an entity for the OCERS Project, and this RFQ represents Step 1. For Step 1, OCERS will shortlist one or more firms that submit SOQs that demonstrate the firm is qualified. For Step 2, the OCERS will invite up to five shortlisted entities identified in Step 1 to respond to a Request for Proposals (RFP) with requirements and evaluation criteria to be determined later. The information obtained from this RFQ will guide OCERS in developing the RFP's selection criteria.

SOQ		100 Points
1.	Strength of DBE proposed contractor's exp. & qualifications	30 points
2.	Strength of DBE proposed architect's exp. & qualifications	30 points
3.	Strength of projects completed as DBE team	25 points
4.	Overall quality of SOQ submission	15 points

Section 8: General Conditions

All terms, conditions, requirements, and procedures included in this RFQ must be met for a submission to be considered. A submission that fails to meet any material term, condition, requirement, or procedure of this RFQ may be disqualified from consideration. OCERS reserves the right to waive or permit the cure of non-material errors or omissions. OCERS reserves the right to modify, amend, or cancel the terms of this RFQ at any time.

OCERS may modify this RFQ before the date fixed for submission of a response by posting, mailing, emailing, or faxing an addendum to the respondents known to be interested in submitting a proposal. However, failure of a respondent to receive or acknowledge receipt of any addendum shall not relieve the respondent of the responsibility for complying with the terms thereof.

The costs incurred in the preparation and the submittal of the SOQ shall be solely borne by the respondents.

All submittals become the property of OCERS.

Section 9: Non-Discrimination Requirement

By submitting, the respondent represents that it and its subsidiaries do not and will not discriminate against any employee or applicant for employment on the basis of race, religion, color, national origin, ethnic group identification, mental disability, physical disability, medical condition, genetic information, marital status, ancestry, sex, gender, sexual orientation, gender identity, gender expression, age, or military and veteran status.

Section 10: Notice Regarding the California Public Records Act

The information submitted in response to this RFQ will be subject to public disclosure pursuant to the California Public Records Act (California Government Code Section 6250, et. seq., the "Act"). The Act provides generally that all records relating to a public agency's business are open to public inspection and

copying unless specifically exempted under one of several exemptions set forth in the Act. If a respondent believes any portion of its Submittal is exempt from public disclosure or discussion under the Act, the respondent must provide a full explanation and mark such portion "TRADE SECRETS," "CONFIDENTIAL," or "PROPRIETARY," and make it readily separable from the balance of the response. Proposals marked "TRADE SECRETS," "CONFIDENTIAL," or "PROPRIETARY" in their entirety will not be honored, and OCERS will not deny public disclosure of all or any portion of SOQ so marked.

By submitting a proposal with material marked "TRADE SECRETS," "CONFIDENTIAL," or "PROPRIETARY," a respondent represents it has a good faith belief that the material is exempt from disclosure under the Act; however, such designations will not necessarily be conclusive, and a respondent may be required to justify in writing why OCERS should not disclose such material under the Act. Fee and pricing proposals are not considered "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY."

If OCERS receives a request pursuant to the Act for materials that a respondent has marked "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY," and if OCERS agrees that the material requested is not subject to disclosure under the Act, OCERS will either notify the respondent so that it can seek a protective order at its own cost and expense, or OCERS will deny disclosure of those materials. OCERS will not be held liable for inadvertent disclosure of such materials, data, and information or for disclosure of such materials if deemed appropriate in OCERS' sole discretion. OCERS retains the right to disclose all information provided by a respondent.

If OCERS denies public disclosure of any materials designated as "TRADE SECRETS," "CONFIDENTIAL," or "PROPRIETARY," the respondent agrees to reimburse OCERS for, and to indemnify, defend, and hold harmless OCERS, its Boards, officers, fiduciaries, employees, and agents from and against:

1. Any and all claims, damages, losses, liabilities, suits, judgments, fines, penalties, costs, and expenses, including, without limitation, attorneys' fees, expenses, and court costs of any nature whatsoever (collectively, "Claims") arising from or relating to OCERS' non-disclosure of any such designated portions of a proposal; and
2. Any and all Claims arising from or relating to OCERS' public disclosure of any such designated portions of a proposal if OCERS determines disclosure is required by law, or if disclosure is ordered by a court of competent jurisdiction.

Section 11: Reservations by OCERS

In addition to the other provisions of this RFQ, OCERS reserves the right to:

1. Cancel or modify this RFQ, in whole or in part, at any time.
2. Make such investigation as it deems necessary to determine the respondent's ability to furnish the required services, and the respondent agrees to furnish all such information for this purpose as OCERS may request.
3. Reject the submittal of any respondent who is not currently in a position to perform the services, or who has previously failed to perform similar services properly, or in a timely manner, or for any other reason in OCERS' sole discretion.
4. Waive irregularities, to negotiate in any manner necessary to best serve the public interest, and to make a whole award, multiple awards, a partial award, or no award.
5. Request additional documentation or information from respondents, which may vary by respondent. OCERS may ask questions of any respondent to seek clarification or to ensure the respondent understands the scope of the work or other terms of the RFQ.

6. Reject any or all submissions in response to this RFQ.
7. Determine the extent, without limitation, to which the services of a successful respondent are or are not actually utilized.
8. Defer shortlist of finalists for the RFP to a time of OCERS' choosing and/or defer issuance of the RFP.
9. Consider information about a respondent other than, and in addition to, that submitted by the respondent.