

# Owner's Representative/Program Manager Services for OCERS New Headquarters Building Project

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## Request for Qualifications (RFQ)

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February 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

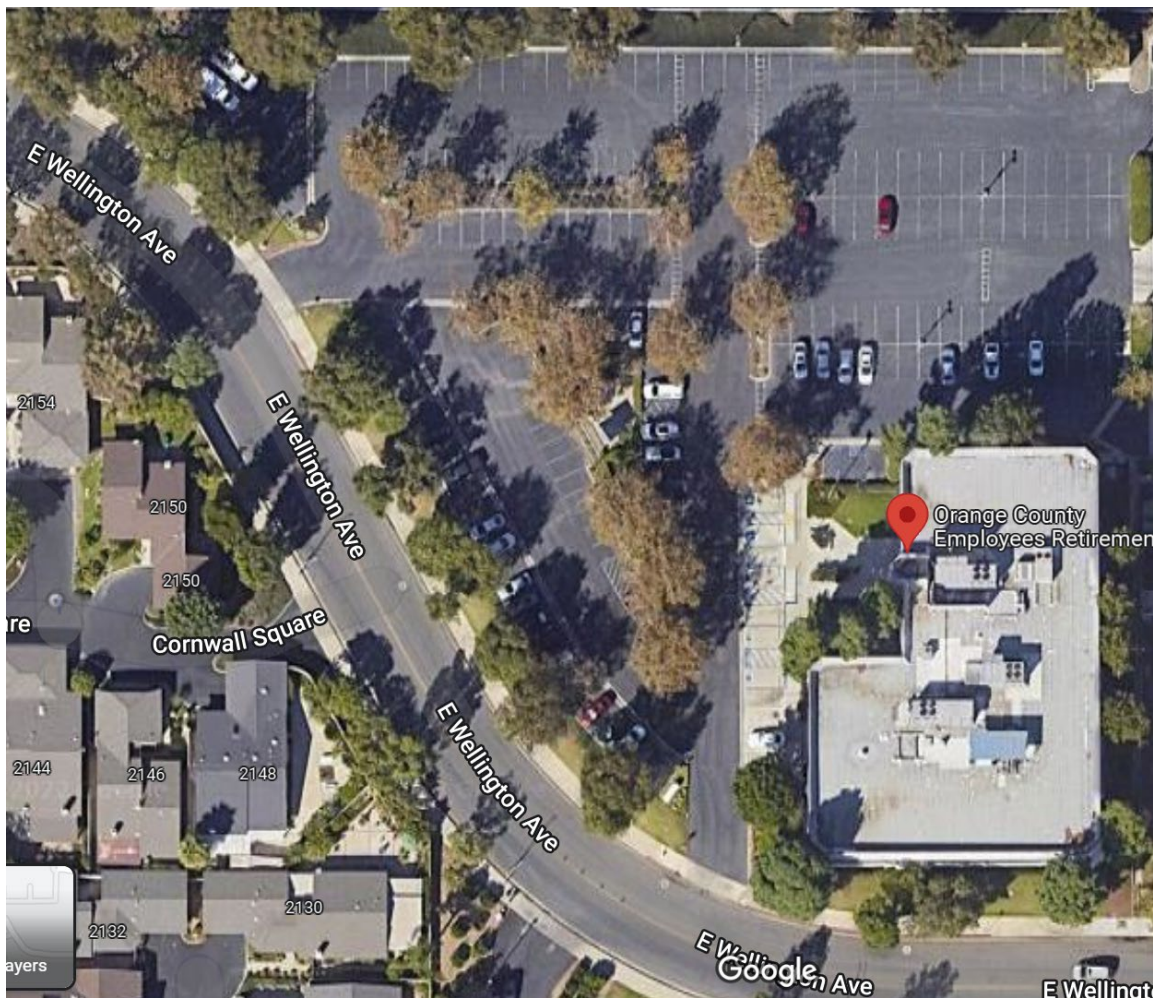
The Orange County Employees Retirement System (OCERS) was established in 1945 under the provisions of the County Employees Retirement Law of 1937 and provides its 50,000 active and retired members with retirement, disability, death, and cost-of-living benefits.

It is governed by a nine-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](http://ocers.org).

## Section 2: 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 92701 (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 100 to a potential 150 within the next few years to meet the work demands from the continued membership increase, OCERS began its strategic planning to either expand the Wellington building or to construct a new HQ building on the Tustin Property (Project). Project planning paused during the Covid-19 pandemic.



The Project recently restarted with the decision to construct a new HQ building and therefore this RFQ.

### **Section 3: RFQ Purpose**

The purpose of this RFQ is to invite firms interested in performing Owner's Representative/Program manager (PM) services related to the planning and construction of a new OCERS headquarters building. The interested firms are to submit their qualifications so that OCERS may determine whether the firm may participate in the upcoming RFP for those PM services. OCERS may invite up to five of the highest-rated firms responding to this RFQ to participate in the RFP process.

### **Section 4: Project Tasks**

The PM 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 sub-consultants and sub-contractors as required under a Construction Manager At Risk (CM@R) Guaranteed Maximum Price (GMP) contract with OCERS to complete the following tasks and activities:

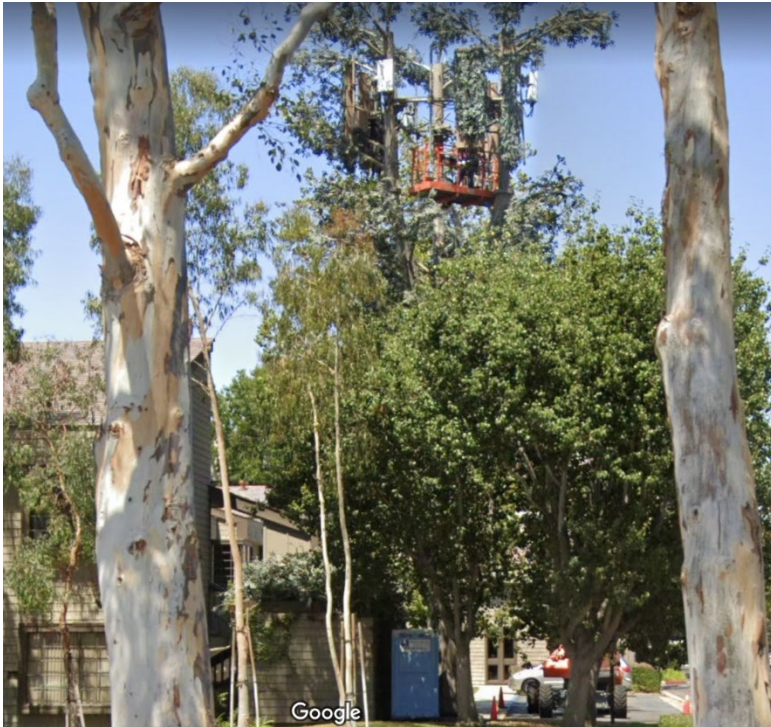
- Siting,
- Space Needs Planning,
- Agency(ies) Entitlement Planning and Processing,
- Applying for and securing all environmental clearances and approvals,
- Permitting,
- Applying for and securing CEDA grants,
- Designing,
- Coordinating,
- Constructing,
- Sub-contracting,
- CM Services,
- Inspecting,
- Commissioning,
- LEED Verifying,
- Warranty, and
- Auditing the new Building and Site Improvements,

the:

- Planning,
- Permitting,
- Decommissioning,
- Demolishing, and
- Removing the existing "Tustin" medical office building, and

the:

- Coordinating and discussing with Verizon Wireless Communications on the disposition of their existing wireless communications tower on the Tustin Property.



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

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

- A maximum of 50 pages 1-sided, excluding covers.
- Font size no smaller than 12-point.
- Detail the Firm’s main line of work.
- A minimum of four (4) projects completed within the last five (5) years of similar Use and size (60,000 SF to 100,000 SF).
- Detail each project’s scope of work.
- Provide each project’s building(s) square footage(s).
- Provide each project’s pre-construction cost estimate vs the as-built final cost (to the nearest \$1M).
- Indicate each project’s planned and actual milestone timelines.
- Indicate the Firm’s level of expertise and success in preparing environmental documents and securing their clearances and approvals from Local and State agencies.
- Indicate the Firm’s Entitlement experiences.
- Indicate the Firm’s resources and staff that could be assigned to Project.

## Section 6: SOQ Submittal Instructions and Questions

The firms wishing to be considered for qualification to continue onto the RFP phase shall submit their SOQ in electronic format to OCERS via PlanetBids or the contact referenced below by **8:00 PM PT, March 8, 2023**:

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

Deliverable	Date	Time
Release of RFP	February 15, 2023	5:00 p.m. PST
RFP Questions Deadline	March 1, 2023	8:00 p.m. PST
RFP Answers Posted	March 6, 2023	5:00 p.m. PST
RFP Submission Deadline	March 8, 2023	5:00 p.m. PST
OCERS Review of RFP Submissions	March 9 through March 31, 2023	
Selection of Finalists	To be determined	
Interviews of Finalists	To be determined	
Service Award [or recommendation to the Board]	To be determined	

All questions and/or comments regarding this SOQ shall be submitted to OCERS via PlanetBids or by e-mail submission to the contact referenced above by **5:00 PM PT, March 1, 2023**.

OCERS will respond to all questions and comments received no later than **5:00 PM PT on March 6, 2023**.

In the event that the received questions and/or comments warrant a submittal deadline extension, OCERS will issue an addendum indicating such time extension.

## Section 7: SOQ Review Process

All SOQs will be reviewed and rated through the QBS (Quality Based Selection) process by a panel of subject matter experts for conformance to these Instructions, Completeness, and Relevancy to the OCERS Project. It is therefore encumbered upon the submitters to ensure quality and complete submittals that correspond to the listed Tasks. OCERS intends to invite no more than five (5) of the highest-rated firms to participate in the RFP process.

## Section 8: General Conditions

The costs incurred in the preparation and the submittal of the SOQ shall be solely borne by the respective Submitters. No compensation shall be made by OCERS for such efforts.

It is encumbered upon the Submitters to ensure timely submittals. OCERS will not accept late submittals due to software malfunctions and/or power outages. Early submittals are strongly encouraged.

All submittals become the property of OCERS. Copy-righted and/or other privileged/proprietary information shall be excluded.

## 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 and the Brown 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.

## **Section 11: Reservations by OCERS**

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

1. Cancel or modify this RFP, 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 proposal 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. Award a contract, if at all, to the firm which will provide the best match to the requirements of the RFP and the service needs of OCERS in OCERS' sole discretion, which may not be the proposal offering the lowest fees.
6. Request additional documentation or information from respondents, which may vary by respondent. OCERS may ask questions of any respondent to seek clarification of a proposal or to ensure the respondent understands the scope of the work or other terms of the RFP.
7. Reject any or all proposals submitted in response to this RFP.
8. Choose to not enter into an agreement with any of the respondents to this RFP or negotiate for the services described in this RFP with a party that did not submit a proposal.
9. Determine the extent, without limitation, to which the services of a successful respondent are or are not actually utilized.
10. Defer selection of a bidder to a time of OCERS' choosing.



11. Consider information about a respondent other than, and in addition to, that submitted by the respondent.