

Request for Statements of Qualifications
for
Furniture Standards Planning,
Procurement,
and Installation Services



County of San Mateo
Project Development Unit

Issued: September 18, 2018
Responses due: October 12, 2018 at 2:30pm PDT

Sam Lin, Manager
County of San Mateo Project Development Unit
1402 Maple Street
Redwood City, CA 94063
Email: slin@smcgov.org

PART 1 – INTRODUCTION

- 1.01** The County of San Mateo (“County”) invites submittals of Statements of Qualifications (“SOQ”) from highly qualified furniture dealerships (“Respondents” or “Vendors”) interested in contracting with the County to provide furniture standards planning, procurement, and installation services (“Services”) for the County’s multiple new construction projects.
- 1.02** This Request for Statements of Qualifications (“RFSOQ”) and the SOQ’s submitted in response are the first stage in the County’s process for determining which Respondent or Respondents will be awarded the contract to provide the Services (“Furniture Contract”). After evaluating all SOQ’s submitted during the RFSOQ stage, the County will select a minimum of three (3) Respondents to participate in the second stage of the process, which will be to submit a Proposal responding to the County’s Request for Proposals (“RFP”). The County will conduct an in-depth evaluation of the Proposals submitted, followed by sequential negotiation beginning with the most qualified Respondent(s).
- 1.03** This RFSOQ and the SOQ, along with the Proposal(s) of the selected Respondent(s), will be included in the County’s Furniture Contract following the award.

PART 2 – PROJECT BACKGROUND

- 2.01** The County of San Mateo Project Development Unit (“PDU”) will be the office providing project management services for this furniture procurement standardization effort. See the PDU website for a list of projects (“Projects”) that may require the Services - <https://cmo.smcgov.org/projects>
- 2.02** As a part of the overall County vision, a long-term plan for the purchasing and installation of furniture has been established with the following goals:
- A. Streamline and standardize the furniture procurement process for all new County projects for best value products and services.
 - B. Provide a user-friendly platform for furniture purchasing that is categorized by area/space types based upon a determined set of County standards.
 - C. Ensure consistency of functional performance, finishes, quality, aesthetics, accessory options, ergonomic standards, environmental standards, and safety/seismic standards across all furniture to be purchased for County projects.
 - D. Support efficient, flexible workplace reconfiguration and maintenance needs.

PART 3 – SCOPE OF SERVICES

3.01 Basic Scope

The selected Vendor(s) shall provide furniture standards planning, procurement, and installation services to support the multiple County new construction projects. Upon award, the selected Vendor(s) shall begin assisting the PDU team with the Furniture Standards development and documentation to support the furniture selection database content and eventually the

procurement and installation process. A Furniture Typology document that outlines the standard space/area types for which furniture is to be purchased and the specifications/requirements for the furniture types will be provided to prequalified Respondents during the RFP stage. The document will also be used as a resource for developing the required product-specific Furniture Standards Manual and Database.

3.02 Scope of Services

The County requests that the Vendor(s) ultimately awarded the Furniture Contract commit a dedicated team or team member to be readily available to assist the County with various services which will include, but be not limited to, the following scope of work:

A. Furniture Standards development and documentation

1. The awarded Vendor(s) shall work with the PDU team to evaluate and select furniture pieces and specifications based on the needs outlined in the Furniture Typology document noted in Section 3.01 above.
2. The Vendor(s) shall provide necessary visual graphic representation (i.e. AutoCAD and Revit symbols, etc.) of selected furniture pieces for the PDU team to incorporate into a concise “Manual” of the County of San Mateo Furniture Standards.
3. The Vendor(s) shall develop a comprehensive “Database” of all items included in the Furniture Standards for the County’s use to support efficient future purchasing.
 - a. The Database shall include, but not be limited to, detailed information regarding specifications, finishes, accessory options, pricing, estimated lead times, warranty information, etc., for each selected piece of furniture.
 - b. The Database shall be in an electronic format that can be accessed online and offline (i.e. without internet connection), available to be in use by multiple people at once, searchable, and easy to update.
4. The Vendor(s) shall develop and make available a “Library” of AutoCAD symbols, Revit families, and SketchUp models to the County for planning purposes.
5. Assist the County with furniture selection from various product lines that meets the design requirements, orders placement and tracking, transportation/delivery management, storage, and furniture installation as appropriate and in line with construction project schedules.
6. Assist the County to evaluate costs and propose alternate furniture options to meet project budgetary constraints when needed.
7. Evaluate the planning and design of standardized furniture for technical and design accuracy and appropriateness for each space/room type on a per project basis.
8. Provide post-install education and guidance to end-user groups on the proper usage, maintenance, and reconfiguration of installed furniture.

9. Provide warranty, maintenance, and reconfiguration services as needed for installed furniture.

PART 4 – GUIDELINES AND SUBMISSION REQUIREMENTS

4.01 Guidelines

- A. Respondents who wish to respond to this RFSOQ must have a minimum of ten (10) years of experience in providing furniture procurement, installation and related services for civic buildings, office buildings, or similar facilities in an urban setting.
- B. The SOQ must contain complete information regarding the experience and qualifications of the Respondent and demonstrate their ability to plan/design, document, manage, procure, and install furniture systems for the County’s new construction projects. The SOQ must also address the Respondent’s ability to work together with the County’s consultant teams.
- C. Respondents should address every item requested in this RFSOQ, even if the item was addressed previously in other sections of the RFSOQ. Brevity and clarity are of utmost importance.
- D. Respondents should read the entire RFSOQ, all addendum/addenda posted including enclosures before preparing their SOQ. Respondents should seek clarification of requirements they do not fully understand.
- E. SOQ’s that are comprised of standard marketing materials that do not specifically address the items requested will not be evaluated. However, Respondents may elect to include one (1) bound copy of supplemental marketing materials, as a separate document, not attached to the SOQ.
- F. SOQ’s that do not comply with all applicable requirements stipulated in this RFSOQ will not be considered.

4.02 Submission Deadline

All SOQ submissions are to be received by PDU no later than **2:30 PM on October 12, 2018** at the address noted in Section 4.03 below. Submittals received late will not be opened or given any consideration and will be returned to Respondent(s) unopened. It is the responsibility of the Respondents to ensure submittals are received at the specified address by the specified deadline noted in this RFSOQ request. All submittals will be date- and time-stamped upon receipt. The County will not be responsible for late or incomplete responses due to weather, mistakes, or delays of the Respondent or its carrier.

4.03 Deliverables

Respondents are requested to submit the following:

- A. **One (1) original, signed, bound SOQ and seven (7) additional bound copies** delivered to:

Sam Lin, Manager
County of San Mateo, Project Development Unit
1402 Maple Street
Redwood City, CA 94063

- B. One (1) electronic PDF of SOQ saved with the filename: "SMC Furniture SOQ [respondent/company name]" uploaded to <http://dbinbox.com/smc pdu> by the same due date and time noted in Section 4.02 above.

4.04 Formatting

- A. The SOQ's shall be printed and bound vertically or portrait on standard 8 ½" by 11" paper.
- B. Type size shall be no smaller than 10-point font, but preferably larger.
- C. SOQ's shall be printed single sided and shall not exceed 30 pages (excluding résumés, lists of projects, financial documents, and any marketing materials), but will preferably be much shorter.
- D. The SOQ shall separate sections with tabs relating to the Qualifications requirement outlined in Part 5 of this RFSOQ.
- E. The top of page one of the SOQ shall state the respondent's name, address, phone number, fax number, e-mail address, and contact name. Cover letter is optional.
- F. The original SOQ must include a statement signed by an owner, officer, or authorized agent of the Respondent acknowledging and accepting the terms and conditions of this RFSOQ.
- G. The SOQ must be verified under oath by the Respondent and each of its members by including the following statement on page one of the SOQ; "I declare under penalty of perjury under the laws of the State of California, that all information submitted under this RFSOQ is true and correct."
- H. Respondents shall acknowledge the receipt of all published Addendum/Addenda by listing them on page one of the SOQ indicating the understanding and acceptance of the changes noted therein.

4.05 Inquiries

All written inquiries and requests for additional information pertaining to this RFSOQ, any addenda, or any matter relating to the selection process, must, unless otherwise identified in an addendum/addenda, be directed to the following point of contact by the due date/time noted in PART 9 below:

Sam Lin, Manager
County of San Mateo Project Development Unit
1402 Maple Street
Redwood City, CA 94063
Email: slin@smcgov.org

PART 5 – QUALIFICATIONS

SOQ's shall include the following information and be presented in the order listed below. All sections must clearly indicate which item is being addressed and be separated by corresponding tabs.

5.01 Company Information

- A. Name of dealership and main manufacturer represented
- B. Address of dealership
- C. Name of primary contact
- D. Telephone + fax numbers of primary contact
- E. E-mail address of primary contact

5.02 Dealership History

- A. Legal structure (corporation, partnership, limited partnership, joint venture, etc.)
- B. Size of dealership / number of staff members in the Bay Area offices and other locations
- C. Years in business
- D. Organizational chart of dealership and tenure of executive management
- E. If dealership is a partnership or association, a listing of all partners, general partners, or association members known at the time of SOQ submission who will participate in the Furniture Contract, if awarded.

5.03 Product and Service Criteria

The following list represents the key criteria the County is looking for in furniture products and the Services to be provided by the Vendor(s). In a checklist format, indicate which items the Respondents would meet/provide.

- A. Product Criteria
 - 1. Available Furniture types / categories
 - a. Workstations / systems furniture
 - b. Conferencing
 - c. Ancillary
 - i. Casual meeting
 - ii. Lounge / soft seating
 - iii. Breakroom
 - iv. Phone booths
 - v. Outdoor café
 - d. Casework
 - e. Glass walls and demountable partitions
 - f. Accessories
 - 2. Design / Functions / Performance
 - a. High quality
 - b. Technology integration
 - c. Ergonomic solutions

- d. Acoustic solutions
 - e. Earthquake solutions
 - f. Easy reconfiguration
 - g. Flexible / multi-purpose furniture
 - h. Consistency of finish and quality across product lines
 - i. Customization
3. Available detailed product information
 - a. ANSI/BIFMA certificates
 - b. LEED data
 - c. NRC ratings
 - d. Safety information
 - e. Warranty
 4. Pricing / cost model
 - a. Estimate quotes
 - b. Volume discount
 - c. Fixed pricing
- B. Service Criteria
1. Wide range of open lines, brands, partnerships
 2. Office located in or near the County of San Mateo
 3. Partnership
 - a. Collaborative design process
 - b. Strong staff capacity
 - c. Dedicated person or team readily available
 - d. Fast response and turn-around time
 4. Design technology resources
 - a. Revit families
 - b. AutoCAD symbols
 - c. Sketch Up models
 - d. Virtual reality capabilities
 - e. Rendering and virtual mock-ups
 - f. Product database / dashboard
 5. Design support and value-added services
 - a. Tailored product curation
 - b. Occupancy and other types of analytics
 - c. Change management support
 - d. Customized industrial design
 - e. LEED documentation (assistance with points calculation, data, etc.)
 - f. Value engineering
 - g. Schedule development
 6. Delivery, installation, and maintenance
 - a. Installation management and scheduling
 - b. Pre-delivery storage

- c. In-house installation team
 - d. Contracted installation team
 - e. Post occupancy maintenance and instruction
 - f. Reconfiguration assistance
7. Project Experience / Client Types
- a. Public / Government
 - b. County
 - c. Health care
 - d. Workplace

5.04 Team Background

A. County contract team - provide team organizational chart

- 1. Principal in Charge
- 2. Project Manager
- 3. Project Designer
- 4. Logistics Manager
- 5. Any additional personnel

B. Résumés of team members (at least for the roles listed in Section 5.04.A above)

- 1. Name
- 2. Office location
- 3. Phone number
- 4. Years of service with dealership and in the industry
- 5. Education
- 6. Professional experience
- 7. Pertinent experience
- 8. Anticipated project roles / services to be provided

C. Proposed subconsultants

Respondents should identify all subconsultants, with whom they would be willing to work, for each type of service. If the following listed and/or other disciplines will be provided from within the dealership's internal staff (i.e. "in-house"), please state so clearly and include these team members in the project organizational chart.

Proposed subconsultants may include, but are not limited to the following types of services:

- 1. Furniture installers
- 2. Moving / transportation services
- 3. Storage services

List any other consultants not listed you anticipate having a role in this account.

Note: The County reserves the right to qualify, accept, or reject any proposed subconsultant(s), as well as to qualify, accept, or reject the use of internal staff to provide certain types of services.

5.05 Relevant Project Experience

The County seeks information regarding the experience of the dealership and proposed team with relevant experience in providing furniture procurement, installation and related services for civic buildings, office buildings, or similar facilities. Provide the requested information for the five (5) most recent relevant projects with construction completed within the past ten (10) years, preferably at least two (2) of which being Bay Area local completed projects built in a highly dense urban environment. Project examples should represent a similar scope, program, and complexity to the County projects as noted in Section 2.01. For each relevant project presented, include the following info:

- A. Project name, location, and size
- B. Brief project description including functions, any special design features, sustainability requirements, awards, certifications, etc.
- C. Description of the roles played by the team members proposed for this project.
- D. Project visuals (i.e. plans, elevations, renderings, photographs)
- E. Completion date / anticipated completion date (indicate if the project was completed or is projected to be completed on time)
- F. Project budget and final furniture cost (indicate if the project was completed or is projected to be completed within budget)
- G. Client reference information including point of contact name and title, phone number, and email address.

5.06 Financial Information

Include financial information which demonstrates the Respondent's financial capability to deliver the Services. This may be submitted under seal and treated as confidential to the extent permitted under applicable federal and state laws. Only one (1) set of original financial documents is required to be included in the original submittal. To demonstrate the financial capability, the Respondents are requested to submit the following items:

- A. Financial statements for the past three (3) years (including Income Statement and Balance Sheet) which are audited or reviewed by an independent accounting firm using GAAP or other information to demonstrate the financial capability necessary for this project.
- B. A list of any loans on which the Respondent has defaulted in the last five (5) years.
- C. A list of financial references, including the point of contact name and title, company name, and phone number, for at least two (2) individuals that have provided the Respondent with financing during the last three (3) years.

5.07 Legal Proceedings and Insurance Claims

- A. List and describe all current litigation involving the Respondent and the proposed staff (in their professional capacities).

- B. List and describe all litigation history for Respondent since January 1, 2010.
- C. List and describe claims against Respondent's Errors and Omissions Policies since January 1, 2010.

"Litigation" includes, but is not limited to, actions in civil or criminal court, mediation, arbitration, and all other forms of dispute resolution.

5.08 Unique Qualifications

- A. This section is the Respondent's opportunity to provide specific information that differentiates it from others participating in this RFSOQ process. This statement should be limited to two (2) pages.
- B. At the Respondent's option, the Respondent may provide any additional supporting documentation or information that would be helpful in evaluating the Respondent's qualifications and commitment.

PART 6 – REVIEW AND SELECTION PROCESS

6.01 Review of SOQ's

- A. The County will evaluate the information based on materials submitted in response to this RFSOQ. All interested dealerships should submit information in response to this RFSOQ based on the requested information specified in accordance with the format and order outlined in Part 4 and 5 of this RFSOQ.
- B. Following the review of the submitted SOQ's, PDU will publish a short-list of prequalified Respondents that will be invited to participate in the subsequent RFP process.

6.02 Evaluation Criteria

- A. Completeness of SOQ submission – SOQ's should contain a comprehensive description of services, respond to each of the items set forth in this RFSOQ, and adhere to the formatting rules.
- B. Personnel experience and qualification – Evaluation of the proposed project personnel, including their qualifications, overall experience, and recent experience on projects of similar nature and complexity to the proposed projects.
- C. Depth and quality of respondent's performance – Review of past performance on County of San Mateo projects and/or other projects of similar nature and complexity to the County's projects; evaluation of client references; and overall responsiveness to County's needs.
- D. Staffing / availability – Evaluation of the current and projected workload of the Respondent, the proposed staffing, and the office location(s) of the proposed staff to be assigned to the project(s).
- E. Financial stability – Evaluation of the overall financial position of the Respondent as determined from financial information required by the RFSOQ.

- F. Sustainable practices – Evaluation of the respondent’s experience in sustainable design, and LEED certifications as demonstrated in the design strategy, experience, and scope of past projects of comparable scope to the County’s project.

PART 7 – ADMINISTRATIVE REQUIREMENTS AND POLICIES

- 7.01** Respondents will be required to comply with all non-discrimination employment regulations, including the following.
 - A. No person shall, on the grounds of race, color, creed, national origin, religious affiliation or non-affiliation, sex, sexual orientation, marital status, age (over 40), disability, medical condition (including but not limited to AIDS, HIV positive diagnosis, or cancer), political affiliation, or union membership be excluded from participation in, be denied the benefits of, or be subjected to discrimination under this agreement.
 - B. Respondents shall ensure equal employment opportunity based on objective standards of recruitment, selection, promotion, classification, compensation, performance evaluations, and management relations, for all employees under any contract that may result from this submittal. Respondents’ personnel policies shall be made available to the County upon request.
 - C. Respondents shall assure compliance with section 504 of the Rehabilitation Act of 1973 by submitting a signed letter of compliance. Respondents shall be prepared to submit a self-evaluation and compliance plan to the County upon request within one (1) year of the execution of any agreement that may result from this submittal.
 - D. Respondents must comply with the County Ordinance Code with respect to the provision on employee benefits. As set forth in the ordinance, such respondents are prohibited from discriminating in the provision of employee benefits between an employee with a domestic partner and an employee with a spouse.
- 7.02** The County reserves the right to accept or reject any or all SOQ’s submitted or to request clarification or additional information or an alternative presentation of data from any respondent, at the County’s sole discretion. Further, while every effort has been made to ensure the information presented in the RFSOQ is accurate and thorough, the County accepts no responsibility or liability for any unintentional errors or omissions in this document.
- 7.03** Should the (“Furniture Contract”) Respondent realize during the review process that there has been a substantive error or omission in its submittal, which does not alter basic services and has not already resulted in disqualification from participating in the RFSOQ process for other reasons, said Respondent is invited to submit to the County Project Manager a written request and explanation of Respondent’s desire to correct its submittal. It shall be at the sole discretion of the County’s selection committee to decide whether to grant the Respondent’s request to correct its SOQ submittal.
- 7.04** All submittals become the property of the County and as such become public documents available to be reviewed by the public upon request. The Government Code Sections 6250 et. seq., the Public Records Act, define public record as any writing containing information relating to the conduct of public business. This applies to submittals pursuant to this RFSOQ. The Public Records

Act provides that public records shall be disclosed upon written request and that any citizen has the right to inspect any public record, unless the document is exempted from the disclosure requirements. The County cannot represent or guarantee that any information submitted in response to the RFSOQ will be confidential.

If the County receives a request for any document submitted in response to this RFSOQ, it will not assert any privileges that may exist on behalf of the person or business submitting the SOQ. Rather, the County will notify the party whose submittal is being sought. In the event that a party who has submitted a SOQ wishes to prevent disclosure, it is the sole responsibility of that party to assert any applicable privileges or reasons why the document should not be produced and to obtain a court order prohibiting disclosure.

- 7.05** Notification of Prequalification will be posted on the PDU website at <http://www.smcpcdu.org>. Successful and unsuccessful Respondents will receive a written notification of whether they are prequalified to proceed to the next phase of RFP. The written notification will be emailed to the name and email address of the authorized officer of the dealership provided in the SOQ submittal. The timing of written notification to Respondents is entirely at the County's sole discretion.

PART 8 – GENERAL CONDITIONS

- 8.01** The SOQ should be clear and concise to enable management-oriented personnel to make a thorough evaluation and arrive at a sound determination as to whether the SOQ meets the County's requirements. To this end, each SOQ should be as specific, detailed, and complete as to clearly and fully demonstrate that the respondent has a thorough understanding of and has demonstrated knowledge of the requirements to perform the work (or applicable portion thereof).
- 8.02** The submission of a SOQ does not obligate the County to award a contract for the project, to pay costs incurred in the preparation of a SOQ or to procure or contract for any services. Costs for preparing the SOQ will be paid entirely by the respondents.
- 8.03** The County reserves the right to interpret or change any provision of this RFSOQ at any time prior to the SOQ submission date. Such interpretations or changes shall be in the form of addendum/addenda to this RFSOQ and posted on the PDU website. The County, in its sole discretion, may determine that a time extension is required for submission of SOQ's, in which case such addendum/addenda shall indicate a new SOQ submission deadline. The County reserves the right to waive inconsequential deviations from stated requirements.
- 8.04** The County retains the right to reject any or all SOQ's, to contract work with whomever and in whatever manner the County decides or to abandon the work entirely. The County shall make final decisions regarding a Respondent's qualifications as of RFP release day. All decisions concerning respondent selection shall be made in the County's best interests.
- 8.05** The County has determined in accordance with Section 6255 of the Government Code that all SOQ's submitted in response to this RFSOQ shall not be made public by the County until after the County issues a notice of intent to enter into a contract with the successful Respondent. In addition, the County has determined in accordance with Section 6255 of the Government Code that all Respondents' proprietary financial information submitted in response to this RFSOQ and specifically identified by the Respondent as "confidential" will not be made public by the County and will be returned to each respondent, unless otherwise required by law. In the event a

Respondent wishes to claim other portions of its SOQ exempt from disclosure under the Public Records Act, the Respondent should clearly identify those portions with the word “confidential” printed on the lower right-hand corner of the page and include a written justification as to why such information should be exempt from disclosure. Blanket designations of “confidential” shall not be effective. However, the County will make a decision based upon applicable laws.

- A. The County will notify the applicable Respondents of any requests for disclosure under the Public Records Act. Respondents agree to defend and indemnify the County from any claims and/or litigation arising from such requests.
- B. Proprietary or confidential data should be readily separable from the SOQ in order to facilitate eventual public inspection of the non-confidential portion of the SOQ. Confidential data is normally restricted to confidential financial information. The price of products offered or the cost of services shall not be designated as proprietary or confidential information.

PART 9 – SCHEDULE

Events	Dates
Project Development Unit issues RFSOQ	9/18/18
Questions via email due: 5:00 pm (see Section 4.05)	10/2/18
Responses to questions posted to webpage	10/5/18
Submission of SOQ’s due: 2:30 pm	10/12/18
Review of all SOQ submittals	10/12/18 -10/19/18
Notice of prequalified Respondents posted	10/19/18
Project Development Unit issues RFP to short-listed Respondents	10/22/18
Scope of services, and fee proposals due: 2:30pm	11/15/18
Interviews with short-listed respondents	11/19/18
Selection committee provides final selection	11/27/18
Board of Supervisors approves contract	12/11/18

**County reserves the right to modify this schedule at any time at its sole discretion.*

END OF RFSOQ DOCUMENT