SAN JOSE/EVERGREEN COMMUNITY COLLEGE DISTRICT  
40 South Market St  
San Jose, CA 95113

ADDENDUM NO. 1

REQUEST FOR QUALIFICATIONS AND PROPOSAL  
RFQP 2018.0001  
PROGRAM FINANCIAL MANAGEMENT, COMPLIANCE, AND COMMUNICATIONS SUPPORT SERVICES ON GENERAL OBLIGATION BOND PROGRAMS (MEASURE G2010 AND Measure X2016)

DATE: July 24, 2017

Notice is hereby given that the following revisions, additions and/or deletions are made a part of and incorporated into the RFP dated September 1, 2016. This Addendum No. 1 is issued to provide for modifications and clarifications to the Request for Qualifications documents. **Bidder shall ascertain prior to submitting their proposal that they have received all addenda issued and shall acknowledge such receipt in the Letter of Transmittal of the Statement of Qualifications.**

In the event of a conflict between the terms and provisions of this Addendum No. 1 and the terms and provisions of the Request for Qualifications documents, the terms and provisions of this Addendum No.1 shall control. In all other respects, the Request for Qualifications documents shall remain unchanged and in full force and effect.

Additions and changes are highlighted in **yellow** below:

**CHANGE #1 – PAGE 2:**

For information within the highlighted box – correct the name of the solicitation as follows:

Re: RFQ/P 2018.0001 Bond Program Financial Management and Compliance Services
Re: RFQ/P 2018.0001 Program Financial Management, Compliance, and Communications Support Services on General Obligation Bond Programs (Measure G-2010 and Measure X-2016)

CHANGE #2 – PAGE 4:

I. INSTRUCTIONS FOR SUBMITTAL OF STATEMENTS OF QUALIFICATIONS/PROPOSALS

... 

2. OVERVIEW OF THE DISTRICT

Replace the first paragraph with the following two (2) paragraphs:

The San Jose Evergreen Community College District (the “District”) was established on July 1, 1964 and is located in Santa Clara County (the “County”), approximately 5 miles south of the San Jose International Airport. The District encompasses approximately 303 square miles in the heart of Silicon Valley, including a portion of the City of San Jose and all of the City of Milpitas. The District operates San Jose City College and Evergreen Valley College (together, the “Colleges”), each of which is fully accredited by the Accrediting Commission for Community and Junior Colleges (the “ACCJC”). For the fiscal year 2017-18, taxable property within the District has an assessed valuation of $137,962,444,792, and the District’s projected full-time equivalent student (“FTES”) is 12,500 students.

“Opportunity, Equity, and Social Justice” are the guiding principles of the San Jose/Evergreen Community College District. These principles are promoted through Board and Administration Policy (BP 6380 and AP 6380, respectively) which seek to promote participation by small disadvantaged vendors, businesses, and contractors.

To clarify and strengthen the District’s efforts in this regard, the Board has commissioned the “Board Ad Hoc Committee on Outreach”. This Committee’s Vision Statement is “SJECCD implements a comprehensive and inclusive program to increase the opportunity and participation for small, ethnic, minority, women, disabled, veteran, LGBTQII owned businesses in its bond program and procurement of goods and services.” The companion Value Statement is “SJECCD prioritizes mindful and conscientious efforts to represent the demographics of the community in providing equitable and inclusive outreach opportunities to businesses with a commitment to the economic growth of all communities.”

CHANGE #3 – PAGE 6:

B. SUBMITTAL/COVER LETTER

In the first paragraph, replace the last sentence as follows:

The submittal letter will NOT be considered part of the ten (10) page limit.
The submittal letter will NOT be considered part of the twenty (20) page limit.

CHANGE #4 – PAGE 7:

C. DESCRIPTION OF VENDOR

8th Bullet: Replace as follows:

The nature of services the vendor has performed in the prior five (5) year period and currently performs in California; please provide information for: (a) public section and public sector education facilities; and (b) public sector higher education facilities;

The nature of services the vendor has performed in the prior three to five (3 to 5) year period and currently performs in California; please provide information for: (a) public section and public sector education institutions; and (b) public sector higher education institutions.

CHANGE #5 – PAGE 7:

C. DESCRIPTION OF VENDOR

9th Bullet, subsection “Gender information by job category”: Replace as follows:

Vendors who do not file an EEO-1 report, use the designations male/female and the job categories enumerated above for race/ethnicity reporting;

Vendors who do not file an EEO-1 report indicate gender identity as “female” or “male” or “non-binary”. Use the job categories enumerated above under race/ethnicity reporting;

CHANGE #6 – PAGE 8:

D. PROJECT TEAM

1st Bullet “Financial Manager”: Replace as follows:

Financial Manager — Individual should have at least 5 years of experience in capital construction programs, including but not limited to Prior Law Bonds, Prop 39 Bonds, State Funded projects, Federally Funded Projects, and have experience with active programs for Community Colleges or K-12 Districts or
Public Sector Agencies. Shall have experience working with Bond Counsel, Tax Counsel, Financial Advisors and Credit Rating Companies.

Financial Manager -- Individuals should have a minimum of 3 years of experience in capital construction programs, including but not limited to Prior Law Bonds, Prop 39 Bonds, State Funded projects, Federally Funded Projects, and have experience with active programs for Community Colleges or K-12 Districts or Public Sector Agencies. Shall have experience working with Bond Counsel, Tax Counsel, Financial Advisors and Credit Rating Companies.

2nd Bullet “Project Accountant”: Replace as follows:

Project Accountant – Individuals should have at least 5 years of experience....

Project Accountant – Individuals should have a minimum of 3 years of experience....

E. EXPERIENCE

Replace as follows:

Identify all engagements of the vendor (present and within the prior five (5) year period)

Identify all engagements of the vendor (present and within the prior three (3) to five (5) year period)

CHANGE #7 – PAGE 9:

F. REFERENCES

Add as follows:

1. Identify at least two (2) K-12 School Districts and/or Community College Districts to which the vendor has provided services as described in this RFQ/P under a direct contract with the District.

1. Identify at least two (2) K-12 School Districts and/or Community College Districts and/or public sector agencies to which the vendor has provided services as described in this RFQ/P under a direct contract with the District.

CHANGE #8 – PAGE 11:

II. EVALUATION AND SELECTION PROCESS

Replace as follows:
2. Phase 1 – PASS/FAIL – STATEMENT OF QUALIFICATION EVALUATION

The following areas will be evaluated on a PASS/FAIL basis. Only SOQ/P which score PASS in every area will advance to Phase 2.

Does the Financial Manager have at least 5 years of experience in capital construction programs, including but not limited to Prior Law Bonds, Prop 39 Bonds, State Funded projects, Federally Funded Projects, and have experience with active programs for Community Colleges or K-12 Districts? This question seeks information regarding the vendor’s fitness for the work. A response indicating that the Financial Manager has at least 5 years of relevant experience shall be scored “Pass.” An answer indicating that the Financial Manager lacks the requisite experience shall be scored “Fail” and disqualified. A non-response shall also be scored “Fail” and disqualified.

Does the Project Accountant have at least 5 years of experience in accounting including but not limited to work on capital construction programs, including but not limited to Prior Law Bonds, Prop 39 Bonds, State Funded projects, Federally Funded Projects, and have experience with active programs for Community Colleges or K-12 Districts? This question seeks information regarding the vendor’s fitness for the work. A response indicating that the Project Accountant has at least 5 years of relevant experience shall be scored “Pass.” An answer indicating that the Project Accountant lacks the requisite experience shall be scored “Fail” and disqualified. A non-response shall also be scored “Fail” and disqualified.

2. Phase 1 – PASS/NO-PASS – STATEMENT OF QUALIFICATION EVALUATION

The following areas will be evaluated on a PASS/NO-PASS basis. Only SOQ/P which score PASS in every area will advance to Phase 2.

Does the Financial Manager have a minimum of 3 years of experience in capital construction programs, in one of the following: Prior Law Bonds, Prop 39 Bonds, State Funded projects, or Federally Funded Projects, and have experience with active programs for Community Colleges or K-12 Districts or Public Sector Agencies? This question seeks information regarding the vendor’s fitness for the work. A response indicating that the Financial Manager a minimum of 3 years of relevant experience shall be scored “Pass.” An answer indicating that the Financial Manager lacks the requisite experience shall be scored “No-Pass” and disqualified. A non-response shall also be scored “No-Pass” and disqualified.

Does the Project Accountant have a minimum of 3 years of experience in accounting work on capital construction programs, in one of the following: Prior Law Bonds, Prop 39 Bonds, State Funded projects, or Federally Funded Projects, and have experience with active programs for Community Colleges or K-12 Districts or Public Sector Agencies? This question seeks information regarding the vendor’s fitness for the work. A response indicating that the Project Accountant has a minimum of 3 years of relevant experience shall be scored “Pass.” An answer indicating that the Project Accountant
lacks the requisite experience shall be scored “No-Pass” and disqualified. A non-response shall also be scored “No-Pass” and disqualified.

CHANGE #9 – PAGE 12:

Replace all occurrences of “Fail” with “No-Pass” as in the following examples:

a. For SBEs and LBEs this is indicated by: at least three such financial management projects in the last five years (Bond Program of at least $75 Million, Construction projects of at least $5 Million). A response indicating yes shall be scored “Pass.” An answer indicating no shall be scored “No-Pass” and disqualified. A non-response shall also be scored “No-Pass” and disqualified.

b. For all other vendors this is indicated by at least five such program financial management projects in the last five years (Bond Program of at least $75 Million, Construction projects of at least $5 Million)?” A response indicating yes shall be scored “Pass.” An answer indicating no shall be scored “No-Pass” and disqualified. A non-response shall also be scored “No-Pass” and disqualified.

a. For SBEs and LBEs this is indicated by: at least three such financial management projects in the last five years (Bond Program of at least $75 Million, Construction projects of at least $5 Million). A response indicating yes shall be scored “Pass.” An answer indicating no shall be scored “No-Pass” and disqualified. A non-response shall also be scored “No-Pass” and disqualified.

b. For all other vendors this is indicated by at least five such program financial management projects in the last five years (Bond Program of at least $75 Million, Construction projects of at least $5 Million)?” A response indicating yes shall be scored “Pass.” An answer indicating no shall be scored “No-Pass” and disqualified. A non-response shall also be scored “No-Pass” and disqualified.

CHANGE #10 – PAGE 13:

Replace as follows:

10. Level of professional employment opportunities created for individuals from underrepresented groups;

10. Level of professional employment opportunities created for individuals from the following population groups: ethnic minority, women, disabled veteran, and/or LGBTQII.
CHANGE #11 – PAGE 14:

3. PHASE 3 – ORAL INTERVIEWS – TOTAL MAXIMUM POINTS 105

Remove without replacement as follows:

At the District’s discretion, the top scoring three (3) to five (5) vendors will be invited to participate in interviews. However, any SBE or LBE that ranks within the top 5 (5) shall receive an interview.

At the District’s discretion, the top scoring three (3) to five (5) vendors will be invited to participate in interviews. However, any SBE or LBE that ranks within the top 5 (5) shall receive an interview.

Also Replace as follows:

Interview Evaluation Criteria – Phase 3 – Total Maximum Points 105

5th Bullet: Overall Performance 20 points

5th Bullet: Overall Prior Work Performance 20 points

CHANGE #12 – PAGE 15:

Replace as follows:

Appointment of Vendor(s) to Serve as Program Financial Management Vendor

Appointment of Vendor(s) to Provide Program Financial Management, Compliance, and Communications Support Services on General Obligation Bond Programs (Measure G-2010 and Measure X-2016)

END OF ADDENDUM NO. 1