



**REQUEST FOR PREQUALIFICATION (RFQ)
OF CONTRACTORS SEEKING
TO BID ON CONTRACTS FOR BEST VALUE - JOB ORDER CONTRACTING (JOC)
FOR**

- **GENERAL BUILDING, B**
- **GENERAL ENGINEERING, A**
- **MECHANICAL, C-4 AND C-20**
- **HEALTHCARE GENERAL BUILDING, B**
- **HEALTHCARE GENERAL ENGINEERING, A**
- **HEALTHCARE MECHANICAL, C-4 AND C-20**

June 2024

Issued by:
SAN BERNARDINO COUNTY
Project and Facilities Management
385 N. Arrowhead Avenue, Third Floor
San Bernardino, CA 92415-0184

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NOTIFICATION OF CONTRACTOR PREQUALIFICATION REQUIREMENTS
OF PROSPECTIVE BIDDERS
FOR
BEST VALUE - JOB ORDER CONTRACTING (JOC) CONTRACTS

NOTICE IS HEREBY GIVEN that pursuant to Public Contract Code Section 20101 the San Bernardino County on behalf of the Project and Facilities Management Department (“County”), invites qualified contractors to complete and submit a Prequalification Questionnaire and other required documents for the purpose of prequalifying, based on public contracting experience, to submit bids for Best Value Job Order Contracts. This prequalification process is a mandatory process for all licensed contractors who intend to submit bids for contracts under the Best Value - Job Order Contracting (JOC) project delivery method to be issued by the San Bernardino County for a period of one (1) year with two (2) options to extend one (1) additional year each, following Issuance of Notice of Prequalification.

It is the County’s intent to utilize contractors prequalified through this solicitation process to bid on contracts under the Best Value JOC project delivery method, which is characterized as small to medium maintenance, renovation, or reoccurring work other than new construction. This solicitation is for separate JOC contracts that will be bid for the following Classifications:

- **General Building, “B” Contractor’s License**
- **General Engineering, “A” Contractor’s License**
- **Mechanical “C-4 and C-20” Contractor’s License**
- **Healthcare General Building, “B” Contractor’s License**
- **Healthcare General Engineering, “A” Contractor’s License**
- **Healthcare Mechanical “C-4 and C-20” Contractor’s License**

All contractors bidding on contracts for Best Value - Job Order Contracting (herein referred as “Work”) for the County must be prequalified in order to submit bids for award. Contractors submitting proposals shall be prequalified to perform work in the category(s) they are bidding.

It is mandatory that all licensed contractors who intend to submit bids for Work encompassed within this prequalification process must: (1) fully complete the Prequalification Questionnaire, (2) provide all materials requested herein, and (3) be approved by the County prior to submitting bids on future Work. No bid will be accepted from a contractor that has failed to comply with these requirements. Contractor must be prequalified, as demonstrated by the County’s Notice of Prequalification, prior to the closing of bidding for any Work. Failure to obtain prequalification by bid closing shall bar contractor from the submission of its bid on the Work.

Prequalified contractors will be invited to bid on Best Value JOC contracts for a term of one-year with a maximum contract value not to exceed \$3,000,000 each, adjusted annually to reflect the percentage change in the California Consumer Price Index, with two, one-year options to extend in the amount \$3,000,000 for each year extension. Bid(s) received from any contractor(s) not approved as prequalified will not be considered and will be listed as not responsive. Contractors who submit a complete prequalification package will be notified by mail of their qualification status, such notice to be provided following completion of the County’s evaluation of the information submitted by contractor, unless additional information is required by the County.

Any person or entity wishing to be considered for prequalification (“Applicant”) must submit a completed Prequalification Questionnaire and other information as required by the Instructions to Applicants For Prequalification (“Instructions”) that are part of the County’s Request for Prequalification, copies of which are/will be available commencing **June 14, 2024**, from the San Bernardino County Electronic Procurement Network (ePro) website: <https://epro.sbcounty.gov/epro/>. All addenda issued (if any) will be posted on ePro. **It is solely the responsibility of each contractor to ensure that they receive any and all addenda from the ePro website.** Completed Prequalification Questionnaires must be submitted as follows: contractor shall submit the following hard copies to the County as required in this solicitation: one (1) USB [containing an electronic copy of the complete submission package], one (1) original, and three (3) paper copies for a total of four (4) complete Prequalification Questionnaires. Paper Prequalification Questionnaires will be accepted at the location identified in the solicitation and can be withdrawn any time prior to the scheduled deadline for submission of a Prequalification Questionnaire. **ADDITIONAL NOTE: All proposers must register with the ePro system prior to the date and time to receive the Prequalification Questionnaire or they will be disqualified. Late or incomplete Prequalification Questionnaires will not be accepted.** System-related issues in ePro shall be directed to Vendor support at ePro.Vendors@buyspeed.com or at (855) 800-5046. For procurement questions involving ePro, please contact the Purchasing Department at (909) 387-2060.

Separate prequalification requirements for each of these Prequalification Categories are included in this solicitation. Any licensed contractor seeking to qualify shall file separate Prequalification Questionnaires and materials required herein for each Prequalification Category (example: a contractor wishing to apply for General Building and General Engineering

must submit two separate packets – one for General Building and one for General Engineering complete with 2 separate completed questionnaires).

A Mandatory Online Prequalification Conference will be conducted on June 26, 2024, commencing promptly at 3:00 p.m. via an online meeting platform. Attendance at the Online Prequalification Conference is mandatory. The meeting will be conducted via the online platform MS Teams. Registration prior to the meeting is required. Please email your company name, attendee name, and contact information to ProjectControls@pfm.sbcounty.gov. The registration deadline is Friday, June 21, 2024, by 5:00 p.m. A link to the Prequalification Conference will be sent to the emails provided.

All Prequalification Questionnaires and other information required by the Instructions to be submitted by Applicants (“Prequalification Submittals”) shall be prepared in conformance with the Instructions using the forms referenced therein or attached thereto. Prequalification Submittals must be received by County at 385 N. Arrowhead Ave. Third Floor, San Bernardino, CA 92415, Thursday, July 25, 2024, at 10:00 a.m. (PST) which date and time are subject to extension by Prequalification Addendum. Applicant assumes full and sole responsibility for timely receipt of its completed Prequalification Submittal at the location noted above.

Interpretations, corrections, and changes by the County of the Prequalification Documents will be made by Prequalification Addenda. Interpretations, corrections, and changes to the Prequalification Documents made in any other manner shall not be relied upon by Applicants and will not be binding upon the County. It is the obligation of Applicant to verify issuance of Notice by the County of a Prequalification Addenda by checking the ePro website at: <https://epro.sbcounty.gov>.

Requests for clarification of the process or documents may be submitted by email to ProjectControls@pfm.sbcounty.gov no later than **5:00 p.m. (PST), Friday, July 5, 2024**.

Submit One (1) original and three (3) paper copies for a total of four (4) complete Prequalification Questionnaires, plus one (1) USB, and related information via mail to:

Project Controls / JOC Coordinator
Project and Facilities Management
385 N. Arrowhead Avenue, Third Floor
San Bernardino, CA 92415-0184
(909) 387-5000

Prequalification Questionnaires shall be submitted in sealed envelopes, clearly marked:

**Prequalification Questionnaire for (The qualification category being applied for) “If
submitting for more than one category, you must submit Prequalification Questionnaire
for each category Separately”
San Bernardino County
Best Value- JOC Request for Prequalification
Contractor Name
Business Address**

Prequalification Questionnaires must be received by 10:00 a.m. (PST) on Thursday, July 25, 2024, at the above referenced address.

Don Day, Director
Project and Facilities Management Department

INSTRUCTIONS TO
APPLICANTS FOR PREQUALIFICATION

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ARTICLE 1
GENERAL PROVISIONS

1.1 Definitions. Capitalized terms used in these Instructions to Applicants (“Instructions”) and their attachments shall have the meanings given to them in these Instructions or its attachments.

1.2 Purpose. The purpose of the prequalification process is to prequalify prospective Best Value - Job Order Contracting (JOC) (“Bidder(s)”) to submit “Bid(s)” for the “Award” by the San Bernardino County (“County”) of proposed JOC contracts (“Contracts”) for Work that may be issued for bid by the County within one year (12 months) of Issuance of Notice of Prequalification. Such Work will be in the following categories: General Building (B); General Engineering (A); Mechanical (C-4 and C-20); Healthcare General Building (B); Healthcare General Engineering (A); and Healthcare Mechanical (C-4 and C-20).

1.3 Preferred Qualifications. Three years of firm experience in Public Agency Facility and/or Public Healthcare Facility projects that require HCAI Plan Review and Compliance is preferred to submit on this prequalification. For the Healthcare Categories, projects completed at Arrowhead Regional Medical Center may not be used to satisfy minimum requirement. Exterior landscape and parking lot projects are not qualifying.

1.4 Authority. This prequalification of bidders is being conducted by County under the authority of Public Contract Code Sections 20101 and 20155.5. This authority is in addition to, and shall not be construed as a limitation upon, any other authority or right of County that may exist under applicable laws to conduct this prequalification or to separately determine the responsibility or qualifications of any Bidder for any future contract within the Prequalification Categories.

1.5 Work. Subject to the County’s reserved rights under Section 1.12, below, Prequalified Bidders will be invited to submit Bids for Award of a Contract(s) for Work as described above in Article 1.2, issued for bid by the County within one year (12 months) of Issuance of Notice of Prequalification.

1.6 County’s Budget. The County’s estimated target budget for the Work will be published as part of the Notice Inviting Bids for the specific Work. The foregoing statement of the County’s Budget does not constitute a promise or representation that County will Award a Contract for the Work to a Bidder submitting a Bid.

1.7 Basis for Prequalification. An Applicant, as defined in Section 1.8, below, will be determined by County to be prequalified or not prequalified on the basis of the information provided in the written submittal provided pursuant to these Instructions, concerning Applicant’s financial ability and experience in performing public works. In the case of an Applicant that is a Project Joint Venture, as defined in Paragraph 4.4, below, Applicant will be prequalified or not prequalified based on the information provided by Applicant in the Prequalification Submittal concerning the financial ability of the Principal Managing Partner as that term is defined in Paragraph 4.4 below, and experience in performing public works of the Constituent Members. During the prequalification process, the County reserves the right to obtain and consider information from third parties, including references and project interviews.

1.8 Deadline. An Applicant wishing to be considered for prequalification must submit its Prequalification Submittal(s) to County on or prior to **10:00 a.m. Thursday July 25, 2024**. Such deadline is subject to extension by County by Prequalification Addendum.

1.9 Applicant. The term “Applicant” means an individual, corporation, partnership or Project Joint Venture (as defined in Paragraph 4.4, below) submitting a Prequalification Submittal.

1.10 Applicant Constituent Members. The term “Applicant Constituent Member” means an individual, corporation or partnership that shares directly in the profits, losses, and liabilities of an Applicant. For example, and without limitation to the foregoing, if Applicant is a partnership comprised of a partner who is an individual and a partner that is a corporation, the individual and the corporation are each an Applicant Constituent Member.

1.11 No Substitutions. No changes in or additions to Applicant Constituent Members of an Applicant shall be permitted after the deadline for submission of Prequalification Submittals, except with the prior written authorization of the County, which authorization may be granted or withheld in the County’s sole and absolute discretion.

1.12 Interested Parties. There is no limitation on any individual, partnership, corporation or Project Joint Venture (as defined in Paragraph 4.4, below) participating as an Applicant, or on any individual, partnership or corporation participating as an Applicant Constituent Member, in more than one Prequalification Submittal. However, no Prequalified Bidder shall be allowed to submit more than one Bid for any one specific contract issued by the County or be “interested in” a Bid submitted by any other

Prequalified Bidder for the Work. "Interested in", as those words are used in this Section 1.11, means that a Prequalified Bidder or an Applicant Constituent Member of a Prequalified Bidder who has a managerial or financial interest in another Prequalified Bidder.

1.13 Reserved Rights. County reserves the right to conduct further prequalification of Bidders, conduct open bidding (i.e., bidding by general public notice and without any requirement for prequalification) or to withdraw the contract from prequalification, bidding, or Award with or without the resetting of the Work for further prequalification, bidding, or Award in the future.

1.14 No Warranty by County. Applicants are solely responsible to satisfy themselves as to the suitability of any information provided by the County that is in the nature of estimates of costs, statements of needs or requirements, projections, budgets, or other information describing the proposed contract or work contemplated by this prequalification, and nothing stated in these Instructions or its attachments shall be construed as implying the creation or existence of any warranty, express or implied, on the part of the County with respect to the accuracy, sufficiency or completeness of such information.

1.15 No License. A determination by the County prequalifying an Applicant shall not be construed as a license to do business for or within the County.

1.16 Debarment, Non-Responsibility. A determination by County that an Applicant is not prequalified does not, unless otherwise expressly stated by County at the time of issuance of its prequalification determination, constitute a finding or determination of debarment or that Applicant is not a responsible bidder as defined in Public Contract Code Section 1103. A determination by the County that an Applicant is prequalified shall not be interpreted as precluding the County, before, at the time of or after receiving a Bid from such Applicant for the work, from: (1) imposing new or additional responsibility requirements or qualification conditions upon all Bidders, including, without limitation, Prequalified Bidders, as part of the bidding process for the Project; (2) making a determination that a Prequalified Bidder lacks the quality, fitness, capacity or experience to satisfactorily perform the work; or (3) requiring prequalification or post-bid qualification of any subcontractor.

1.17 Objections by Applicant. Any objection by an Applicant to the procedures or processes set forth in the Prequalification Documents must be submitted to the County, in writing, no later than **5:00 p.m. on August 24, 2024**. Failure by an Applicant to so object shall constitute a final and conclusive waiver by Applicant of its right to thereafter assert such objection, including, without limitation, the right to submit such objection as grounds for an appeal or protest pursuant to Article 5, below.

1.18 Calculation of Time Periods. If these Instructions or its attachments ask Applicant to provide information or respond to a question concerning events occurring within a stated time period (such as, "within the past 5 years"), it shall be deemed to mean the period of time that precedes the date that Applicant first submits its Prequalification Submittal to the County; provided, however, that if a question asks for information pertaining to a stated number of prior full calendar (or fiscal) years, it shall mean the stated number of years immediately preceding the calendar or fiscal year in which the Prequalification Submittal is submitted by Applicant. If these Instructions or its attachments ask, by exact words or in substance, that Applicant provide information concerning conditions or circumstances as they exist currently, it shall be deemed to refer to the conditions or circumstances as they exist on the date that Applicant submits its Prequalification Submittal.

ARTICLE 2
APPLICANT REPRESENTATIONS

Each Applicant and Applicant Constituent Member who signs and submits a verification in support of Applicant's Prequalification Submittal represents that:

2.1 Compliance with Prequalification Documents. Applicant's Prequalification Submittal is made in compliance with the requirements of the Prequalification Documents.

2.2 Due Authorization. Each person or entity signing a verification of Applicant's Prequalification Questionnaire is authorized to do so and any such signer that is a corporation is authorized to do business in, and is in good standing under the laws of, the State of California.

2.3 Required License(s). Applicant has been issued and currently holds the following license(s) issued by the Contractor's State License Board for the State of California that is (are) active and in good standing ("Required License(s)") as listed herein for the following Prequalification Category:

- **General Building, "B" Contractor's License**
- **General Engineering, "A" Contractor's License**
- **Mechanical "C-4 and C-20" Contractor's License**
- **Healthcare General Building, "B" Contractor's License**
- **Healthcare General Engineering, "A" Contractor's License**
- **Healthcare Mechanical "C-4 and C-20" Contractor's License**

The above listed license(s) are mandatory for the Prequalification.

2.4 Labor Compliance. Applicant will, if awarded the Construction Contract for a Project, comply with all of the applicable provisions of the California Labor Code Sections 1770 et seq., including, without limitation, payment of prevailing wages, maintenance, and submission of weekly-certified payrolls, hiring of apprentices and establishment, implementation and maintenance of an injury and illness prevention program.

2.4.1 County public works projects are subject to compliance monitoring and enforcement by the Department of Industrial Relations (DIR) in accordance with Labor Code Section 1771.4(a)(1). As part of this program, contractors and subcontractors on public works projects are required to be registered with DIR in accordance with Labor Code Section 1725.5. Unregistered contractors are not qualified to bid on, be listed in a bid proposal, listed as a subcontractor, or engage in the performance of any Public Works Contract, all as more particularly described in Labor Code Section 1771.1(a). All Applicants must be registered with the DIR, and in good standing with the DIR, at the time of submitting Applicant's Prequalification Submittal.

ARTICLE 3
PREQUALIFICATION SCHEDULE

3.1 Prequalification Schedule.

The following is the anticipated schedule for the prequalification process ("Prequalification Schedule"):

3.1.1	Advertisement of Request for Prequalification	June 14, 2024
3.1.2	Mandatory Prequalification Conference	June 26, 2024 at 3:00pm
3.1.3	Deadline for Requests for Clarification	July 5, 2024 at 5:00 p.m.
3.1.4	Final Date for County to Issue Addenda	July 19, 2024
3.1.5	Prequalification Submittals Due	July 25, 2024 at 10:00 a.m.
3.1.6	Project Reference Interviews	July 26, 2024 to August 7, 2024
3.1.7	Notice of Prequalification Selection	Week of August 14, 2024

3.2 Schedule Changes. The County reserves the right, at any time, to make additions, modifications, or deletions to any of the events or dates that comprise the Prequalification Schedule by issuance of a Prequalification Addendum. Unless otherwise expressly qualified in these Instructions or its attachments, references in these Instructions or its attachments to the Prequalification Schedule, or to dates in the Prequalification Schedule, shall mean the schedule and dates set forth in Section 3.1, above, as adjusted by any changes thereto made pursuant to a Prequalification Addendum.

ARTICLE 4 **PREQUALIFICATION PROCEDURES**

4.1 Prequalification Documents. The Prequalification Documents consist of the following: (1) the Advertisement of Request for Prequalification; (2) these Instructions to Applicants (including, without limitation, all attachments hereto); and (3) Prequalification Addenda. Prequalification Documents may be obtained at the San Bernardino County Electronic Procurement Network (ePro) website: <https://epro.sbcounty.gov>.

4.2 Prequalification Questionnaire. Applicants will be evaluated for prequalification based on the responses that they give to the Prequalification Questionnaire and any additional information obtained by County in the manner permitted by the Prequalification Documents, including, without limitation, interviews by County of Project References provided by Applicant. All responses to questions in the Prequalification Questionnaire must be made on the form of Prequalification Questionnaire attached hereto as Attachment No. 4 for each Prequalification Category the contractor submits for, or where there is insufficient space in the Prequalification Questionnaire to provide a complete response, on separate sheets signed by the individual executing the verification on behalf of Applicant. If more than one signed verification is required, such separate sheets need only be signed by one signer of the verification signing on behalf of Applicant. Failure to provide available information that is required by the Prequalification Documents shall be grounds for disqualification. Failure to provide information requested in response to a Question contained in the Prequalification Questionnaire that does not constitute a "pass/fail" or scored Question (i.e., a Question that seeks background or contact information only) shall be accompanied by an explanation of the reason for the failure to respond and any failure to respond that is found by the County to be without substantial justification shall constitute a grounds for disqualification. Unless otherwise requested elsewhere in the Prequalification Documents, all information provided shall be current as of the date of submission by Applicant of its Prequalification Submittal.

4.3 Prequalification Submittal. The following documents comprising Applicant's Prequalification Submittal are required to be submitted by an Applicant in order to be considered for prequalification. Applicant shall provide one (1) USB [containing an electronic copy of the complete submission package], one (1) original marked "Original" and three (3) paper copies. The Prequalification package shall include the following:

4.3.1 A completed **Prequalification Questionnaire** in the form attached hereto as Attachment No. 4.

4.3.2 A completed **Verification** in the form attached hereto as Attachment No.1, signed in the manner required by these Instructions, on behalf of each of the following: (1) if Applicant is an individual or a corporation, by Applicant; or (2) if Applicant is a partnership by Applicant and by each of its Applicant Constituent Members.

4.3.3 Completed and signed **Release(s) of Information** in the form attached hereto as Attachment No. 2, signed in the manner required by these Instructions, on behalf of each of the following: (1) if Applicant is an individual or a corporation, by Applicant; or (2) if Applicant is a partnership or Project Joint Venture, by its Managing Partner.

4.3.4 A completed **Campaign Contribution Disclosure** in the form attached hereto as Attachment No.6.

4.3.5 Surety Statement: Each Applicant is required to submit with its Prequalification Submittal a notarized statement from an admitted surety insurer (approved by the California Department of Insurance) that is authorized to issue bonds in the State of California stating that Applicant's capacity to obtain a performance bond and payment bond is sufficient at the time of execution of such statement for Applicant to enter into a Construction Contract for the minimum bonding capacity stipulated in these Instructions for the specific Prequalification Category for which Applicant is submitting for consideration, and for such surety to issue a performance bond and payment bond for the full amount designated therein. The minimum threshold capacity for performance bond and payment bond is stipulated in the Questionnaire for each Prequalification Category for which the contractor seeks to be considered (see below). The County reserves the right to increase the amount of the maximum potential JOC contract, and the required performance and payment bonds amounts, during the procurement process to receive bids from qualified JOC contractors. The submitted notarized statement must be from the surety company, not an agent or broker. Nothing stated in the Prequalification Documents shall be construed as limiting the County's right to require that an additional notarized statement from a surety be submitted by Applicant at the time of submission of its Bid that is based upon the full amount of such Bid or that a performance bond and payment bond or bid bond be submitted by Applicant as part of its Bid in the full amount of its Bid, even if

its Bid is more than the amount of the County's Budget. The bonding requirements for each specific Prequalification Category are as follows:

- **General Building "B":** **\$3,000,000**
- **General Engineering "A"** **\$3,000,000**
- **Mechanical "C-4 and C-20"** **\$3,000,000**
- **Healthcare General Building "B"** **\$3,000,000**
- **Healthcare General Engineering "A"** **\$3,000,000**
- **Healthcare Mechanical "C-4 and C-20":** **\$3,000,000**

4.3.6 General Liability Insurance Coverage: Each Applicant shall attach a copy of a current certificate of General Liability Insurance coverage of at least three million dollars \$3,000,000 per occurrence with a California admitted insurance company. The certificate of General Liability Insurance must be able to name "San Bernardino County" as Additional Insured.

Note: The following Auto insurance requirements shall be met at the award of contract but are not required as a part of this prequalification package: Primary insurance coverage shall be written on ISO Business Auto coverage form for all owned, hired and non-owned automobiles or symbol 1 (any auto). The policy shall have a combined single limit of not less than three million dollars (\$3,000,000) for bodily injury and property damage, per occurrence.

4.3.7 Bank Letter: Each Applicant shall attach an original, signed letter(s) from Applicant's bank(s) on the bank's letterhead stationery confirming Applicant's relationship, credit, and banking history including the type of account(s) Applicant has, name of the branch manager, and his or her contact information. If Proposer's line of credit is held at an alternate financial institution, provide an original, signed letter from institution, on the institution's letterhead, verifying the availability of a line of credit.

4.3.8 Current Registration with California Department of Industrial Relations (DIR): Each Applicant shall attach a copy of the registration with California Department of Industrial Relations. The listed Applicant name on the license held for the Prequalification Submittal must match the DIR registrant name.

4.3.9 Additional Information: The County reserves the right, but shall not have the obligation, to request additional information from an Applicant that may be necessary to complete the County's evaluation of Applicants. Applicant is responsible to provide such information, if requested, within five (5) calendar days of request by the County.

4.4 Project Joint Ventures. A "Project Joint Venture" is a joint venture formed solely for the purpose of performing the classification of contracts for the County that are described in these instructions. "Principal Managing Partner" means the joint venture partner of a Project Joint Venture who is primarily responsible for the day-to-day management of the business of the Project Joint Venture.

4.5 Evaluation Process. Each Applicant's Prequalification Submittal will be evaluated based on a uniform system of scoring (See Attachment No. 5). Without limitation to any other requirements set forth in the Prequalification Documents, in order to successfully be considered for review of the Prequalification package an Applicant must:

4.5.1 Submit all of the documents and information comprising a complete Prequalification Submittal as required by Section 4.3, above and listed below

4.5.2 Meet the pass-fail requirements set forth in Part II of the Prequalification Questionnaire and provide the completed documents listed below:

- A. Proposer has submitted a completed **Prequalification Questionnaire, including all required attachments.**
- B. Proposer has submitted a completed **Verification Form** as required by Article 4.3.2.

C. Proposer has submitted a completed Release of Information Form as required by Article 4.3.3 meeting minimum stated requirements.

D. Proposer has submitted a completed Campaign Donation Disclosure as required by Article 4.3.4 meeting minimum stated requirements

E. Proposer has submitted a completed Surety Statement as required by Article 4.3.5 meeting minimum stated requirements.

F. Proposer has submitted a completed Proof of General Liability Insurance Coverage as required by Article 4.3.6 meeting minimum stated requirements.

G. Proposer has submitted a completed Bank Letter as required by Article 4.3.7 meeting minimum stated requirements.

H. Proposer has submitted evidence of Registration with the California Department of Labor Relations (DIR) as defined by Article 4.3.8 meeting minimum stated requirements.

I. Proposer has successfully responded to all **Essential Requirements** as defined in Part II of the Prequalification Questionnaire.

J. Proposer has provided the required **Project Reference Forms** as defined in Part VI of the Prequalification Questionnaire.

4.5.3 At the conclusion of the Evaluation Process, Applicants meeting the minimum requirements and obtaining a minimum combined score as stated below will be selected for the list of the identified Pre-Qualified Best Value JOC Contractors per category.

MINIMUM REQUIRED POINTS PER CATEGORY

- General Building “B”: 312 Points
- General Engineering “A” 312 Points
- Mechanical “C-4 and C-20” 312 Points
- Healthcare General Building “B” 312 Points
- Healthcare General Engineering “A” 312 Points
- Healthcare Mechanical “C-4 and C-20”: 312 Points

4.6 Reference Interviews. Without limitation to the County’s rights under Section 4.7, below, County reserves the right, but assumes no obligation, to contact and interview any person or organization identified in Applicant’s response to Part VI, of the Prequalification Questionnaire concerning Applicant’s past performance on its Project References. Interviews will be conducted in accordance with the rules for interviews set forth in Part VI of the Prequalification Questionnaire following a pre-set list of questions set forth in Attachment No. 3 attached hereto. Applicant assumes sole responsibility for any inaccuracies, or lack of currency of, the information provided by Applicant in its Project References. Incorrect or non-current contact Information provided in response to a request for a Project Reference may, in the sole discretion of County, be treated as a failure by Applicant to provide a complete response, resulting in either a reduction in Applicant’s score or disqualification.

4.7 Additional Investigations. In addition to the County contacting the Project References listed in Applicant’s responses to Part VI of the Prequalification Questionnaire, County shall have the right, but not the obligation, before or after an Applicant has been prequalified, to investigate the facts or circumstances of any response by an Applicant. Except as provided in Article 5, below, the County has no obligation to afford any Applicant the opportunity, as part of the scoring process of an Applicant’s Prequalification Submittal or otherwise, to respond to any adverse information that is received as a result of such investigations.

4.8 Prequalification Selection. The County will designate an individual or group of individuals to conduct the evaluation of Applicant's Prequalification Submittal on behalf of the County. The identities of such individual(s) shall not be disclosed by the County to Applicants. Those individual(s) designated to score the Prequalification Submittal shall be employees of or consultant to the County.

4.9 Unauthorized Communications. Unless requested to do so in writing by County or as otherwise permitted by these Instructions, Applicants and Applicant Constituent Members shall not communicate, either verbally or in writing, concerning any aspect of the prequalification process with: (1) any consultant or professional retained by the County for the purpose of providing the County advice or professional services in respect to the prequalification process; or (2) any employee or representative of the County.

4.10 Proceedings. Unless otherwise directed by the County in a Prequalification Addendum, all proceedings conducted for the purpose of or related to the prequalification of Applicants, other than the Prequalification Conference, shall be closed to the public.

4.11 Requests for Clarification. Applicants are solely responsible to seek clarification, if needed, of any portion of the Prequalification Documents. All requests by Applicants for clarification of the Prequalification Documents ("Request(s) for Clarification") must be submitted, by 5:00 p.m. on July 5, 2024, by e-mail to ProjectControls@pfm.sbcounty.gov. Requests for Clarification received after that time will not be responded to. Failure by an Applicant to seek clarification of any portion of the Prequalification Documents shall neither relieve Applicant from its representations as set forth in Article 2, above, nor serve as the basis for any claim by Applicant that it was mistaken or misled in connection with the preparation of its Prequalification Submittal.

4.12 Prequalification Addenda. Interpretations, corrections, and changes by the County of the Prequalification Documents will be made by Prequalification Addenda. Interpretations, corrections, and changes of the Prequalification Documents made in any other manner shall not be relied upon by Applicants and will not be binding upon the County. **All Addenda will be uploaded to the ePro website.** It is the obligation of Applicant to verify issuance of Notice by the County of a Prequalification Addenda by checking from the San Bernardino County Electronic Procurement Network (ePro) website: <https://epro.sbcounty.gov>. Failure of an Applicant to receive a Prequalification Addendum shall not entitle Applicant to an extension of the Prequalification Schedule nor shall it permit the submission of any additional prequalification information after the deadline for receipt of the Prequalification Submittal set forth in the Prequalification Schedule.

4.13 Preparation, Copies. The portions of the Prequalification Submittal prepared or filled in by an Applicant must be either typed or completed in ink. Responses in pencil are unacceptable. For "Yes" or "No" answers, Applicants must indicate either "Yes" or "No" by putting a check mark or "X" mark in the box next to "Yes" or "No". If there is a requirement that Applicant or any Applicant Constituent Member submit any additional documents, they shall be packaged as part of Applicant's Prequalification Submittal. One (1) USB, one (1) original marked "Original" and three (3) paper copies of the Prequalification Submittals shall be submitted.

4.14 Verification. Prequalification Questionnaires must be verified in the manner required by Paragraph 4.3.2, above, using the form of verification attached hereto as Attachment No. 1 by an individual with legal authority to bind the person or entity on whose behalf such individual is signing.

4.15 Submission. One (1) USB, one (1) original(s) marked "original" and three (3) paper copies of the Prequalification Submittal shall be submitted. Prequalification Submittals shall be submitted through ePro, hand delivered to, or received by mail at, County, 385 N. Arrowhead Ave. Third Floor, San Bernardino, CA 92415 at any time Monday through Friday between the hours of 8 a.m. to 5 p.m., prior to the deadline for receipt of Prequalification Submittals set forth in the Prequalification Schedule. Prequalification Submittals that are submitted after the deadline specified in the Prequalification Schedule will not be considered and will be returned, unopened. Oral, telephonic, or electronically transmitted Prequalification Submittals will not be considered. Applicant assumes full responsibility for timely delivery of its Prequalification Submittal at the location designated therefor in these Instructions. Please allow enough time to find parking and go through required security checkpoints.

4.16 Sealed Envelope. Each Prequalification Submittal, including the original(s) and each copy, shall at the time of delivery be enclosed in a single, sealed opaque envelope. Piecemeal submissions are not permitted. The envelope, as well as any outer envelope or packaging in which the envelope may have been placed by Applicant or the carrier, shall be addressed and delivered as required by these Instructions and shall be clearly and conspicuously labeled with Applicant's name and address and the words **"PREQUALIFICATION QUESTIONNAIRES SAN BERNARDINO COUNTY JOC REQUEST FOR PREQUALIFICATIONS FOR (THE QUALIFICATION CATEGORY BEING APPLIED FOR)"**.

4.17 Supplemental Information. Without limitation to the County's rights under Section 4.22, below, unless requested by the County in a Prequalification Addendum or otherwise required by these Instructions, an Applicant shall not have the right to submit new or additional information to supplement its Prequalification Submittal after the deadline in the Prequalification Schedule for receipt of Prequalification Submittals.

4.18 Withdrawal, Resubmission. Prequalification Submittals may be withdrawn upon written notice to the County that is received by County at the place for receipt of Prequalification Submittals. Prequalification Submittals withdrawn prior to the deadline for receipt thereof set forth in the Prequalification Schedule may be resubmitted up to the deadline for receipt of Prequalification Submittals set forth in the Prequalification Schedule.

4.19 Rejection, Cancellation, Revocation. Without limitation to any of the County's other rights under the Prequalification Documents or applicable laws, the County reserves the right, exercised in its sole and absolute discretion, to at any time: (1) reject any Prequalification Submittal that fails to comply with the requirements of the Prequalification Documents or that contains any information that the County determines is false or misleading; (2) reject all Prequalification Submittals; (3) withdraw and cancel its Request for Prequalification of Contractors Seeking to Bid on Contracts for JOC; (4) cancel, revoke or limit the prequalification status or rating of any Prequalified Bidder based on subsequently-learned information indicating that the Prequalified Bidder's Prequalification Submittal contained false or misleading information; (5) cancel, revoke or limit the prequalification status, or rating of any Prequalified Bidder based on receipt of new information that the Prequalified Bidder is obligated to disclose in accordance with its continuing obligations under Section 4.21, below; or (6) cancel or revoke the prequalification status of all Prequalified Bidders for any reason, without cause and for its convenience (with or without the issuance of a further Request for Prequalification of Prospective Bidders). Exercise by County of its rights under this Section, or of any other right of County under these Instructions or applicable laws to cancel, revoke or limit the prequalification status or rating of any Prequalified Bidder shall not, under any circumstance, give rise to any liability or obligation on the part of County nor shall it constitute grounds for any claim by an Applicant or Prequalified Bidder for recovery from County of any loss, damage, cost or expense.

4.20 New Information by Applicant. Applicant has the continuing obligation, commencing upon submission of its Prequalification Submittal and continuing until termination of any Award of a Construction Contract, to immediately notify the County, in writing, if it learns that any of the following have occurred: (1) any statement made in its Prequalification Submittal was false or misleading when made; (2) circumstances have occurred since Applicant submitted its Prequalification Submittal that, if they had occurred prior to the date that Applicant submitted its Prequalification Submittal, would have constituted grounds for the automatic disqualification of Applicant under the terms of Prequalification Questionnaire; provided, however, that the obligation set forth in Clause (2) of this Section 4.21 shall not extend to or include the providing of information that would involve a recalculation of Applicant's Experience Modifier Rate; (3) there has been a change in or addition to Applicant Constituent Members; or (4) Applicant has undergone a change in ownership in which ownership of 50% or more of its stock or assets has changed. Additional information provided by Applicant shall be submitted under oath using the form of verification provided as part the Prequalification Documents.

4.21 Certification for Bidding. A Prequalified Bidder may be required by County, as a condition of submitting a Bid in the future as a result of this Prequalification, to prepare and file a certification affirming under oath that it has no new information to disclose that would constitute new information of the type that it has a continuing obligation to disclose pursuant to Section 4.21, above.

4.22 Waiver of Irregularities. County reserves the right to waive minor or clerical irregularities, errors, or omissions in the prequalification process, in the information contained in any Prequalification Submittal or in regard to any Applicant's compliance with the prequalification process. The County's determinations with respect to waiving or not waiving any such irregularities, errors, or omissions shall, in the exercise of its sole and absolute discretion, be final, and binding upon Applicant.

4.23 Not Public Records. Except as otherwise provided by applicable laws, a Prequalification Submittal (including, but not limited to, any included financial information) is not a public record and is not open to public inspection. However, contents of a Prequalification Submittal may be disclosed to third parties for the purpose of verifying information or in the process of an appeal or determination of a protest. If applicable law provides that the names of contractors applying for prequalification status are public records subject to disclosure, and if applicable law does not otherwise require, only the first page of the Prequalification Questionnaire will be disclosed.

4.24 Applicable Laws. All Prequalification Submittals must be submitted, filed, made, and executed in accordance with applicable laws, whether or not such applicable laws are expressly referred to in or conflict with the requirements of the Prequalification Documents.

4.25 Costs and Expenses. Applicants shall bear, at their own expense and without reimbursement by the County, all costs, and expenses associated with their participation in the prequalification process or in connection with the preparation or submission of Bids for the Project.

4.26 Receipt of Notices. Notices by the County to an Applicant that are issued after the deadline in the Prequalification Schedule for submission of Prequalification Submittals shall be deemed delivered and received by Applicant if provided by delivery, mail or e-mail to Applicant at the address provided by Applicant at the Prequalification Conference, in its Prequalification Submittal, or at Applicant's last known address. It is the obligation of Applicant to verify issuance of Notice by the County of a Prequalification addenda by checking the County's website. Failure of an Applicant to receive a Prequalification Addendum shall not entitle Applicant to an extension of the Prequalification Schedule nor shall it permit the submission of any additional prequalification information after the deadline for receipt of the Prequalification Submittal set forth in the Prequalification Schedule.

4.27 Notice of Prequalification. The County will issue a notice ("Notice of Prequalification") to Applicants who have successfully prequalified. Formal issuance of a Notice of Prequalification is for the convenience of Applicants and is not a condition to the validity of the County's determination that an Applicant is or is not prequalified.

4.28 Non-Transferable. Neither an Applicant's Prequalification Submittal nor a Prequalified Bidder's prequalification status is assignable or transferable. Any attempt to assign or transfer in violation of this provision shall be null and void.

4.29 Subsequent Responsibility Determination. A determination that an Applicant is prequalified does not constitute a waiver by the County of its right to make a subsequent determination that a Prequalified Bidder, or any Subcontractor to a Prequalified Bidder, is not a responsible bidder as defined in Public Contract Code Section 1103 to submit a Bid for Award of a JOC contract.

4.30 Debriefing. At the County's option, exercised in its sole and absolute discretion after the issuance of the Notice of Prequalification, the County may make available for those requesting it an opportunity for a debriefing. Debriefings, if conducted, will be conducted in accordance with the Prequalification Schedule. At the prequalification debriefings, summaries of the overall evaluation of an Applicant's Prequalification Submittal will be reviewed. Copies of Prequalification Submittals or scoring of individual questions will not be provided nor will there be point-by-point comparisons of competing Prequalification Submittals.

ARTICLE 5 **APPEALS AND PROTESTS**

5.1 Appeals

5.1.1 Appeal of Prequalification Determination. Any Applicant may dispute the County's determination denying prequalification status to Applicant by filing an appeal provided that each and all of the following are complied with:

A. The appeal shall be in writing and include a request for hearing of the appeal.

B. The appeal shall be based on a dispute relating to the prequalification rating of Applicant filing the appeal; appeals are not permitted if the reason for disqualification is the failure by Applicant to submit a complete Prequalification Submittal.

C. The appeal shall be filed with and received by the County at the following address: San Bernardino County, Purchasing Department, Attn: Dylan Newton 777 E. Rialto Avenue, San Bernardino, CA 92415-0760, not more than ten (10) calendar days following the date of issuance of the County's Notice of Prequalification. Failure to timely file an appeal shall constitute grounds for the County to deny the appeal without further consideration of the grounds stated therein and shall constitute a waiver by Applicant of any and all rights to challenge the prequalification decision of the County, whether by administrative process, judicial process or any other legal process or proceeding.

5.1.2 Notification of Grounds. If Applicant's written notice of appeal requests that County give a written explanation of the basis for disqualification, then County shall provide Applicant with a written statement of the basis for Applicant's disqualification and any supporting evidence that has been received from others or adduced as a result of an investigation by Applicant.

5.1.3 Hearing. An Applicant that has properly filed an appeal in accordance with the requirements of Paragraph 5.1.1, above, shall be given notice and opportunity to appear before a panel ("Appeal Panel"), consisting of individuals appointed by the Purchasing Department, to rebut any evidence used as a basis for disqualification and to present evidence as

to why Applicant should be prequalified. Hearing before the Appeal Panel shall be an informal process. If Applicant chooses not to avail itself of this process, then the County's determination that Applicant is not prequalified may be adopted by the County without further proceedings.

5.1.4 Final Decision. The Appeal Panel shall provide a written decision to the Purchasing Agent to review and notify Applicant filing the appeal, either granting or denying the appeal. The written decision of the Appeal Panel on an appeal shall be final, unless overturned by the Board of Supervisors.

5.2 Protests. Any protest with respect to the conduct of the prequalification process, not involving an appeal by an Applicant pursuant to Section 5.1, above, of a determination that such Applicant is not prequalified, must be filed in writing within ten (10) calendar days following the date of issuance of the County's Notice of Prequalification. Such protest can only be brought on the following grounds:

1. Failure of San Bernardino County to follow the selection procedures and adhere to requirements specified in the RFQ or any addenda or amendments.
2. There has been a violation of conflict of interest as provided by California Government Code Section 87100 et seq.
3. A violation of State or Federal law.

Notice of protest must be sent to:

Pete Mendoza, Director
San Bernardino County
Purchasing Department
777 E. Rialto Avenue
San Bernardino, CA 92415-0760

Such protest shall state the grounds for the protest and any evidence and legal authority for such protest. Without limitation to the provisions of Section 1.16, above, failure to do so shall result in Applicant waiving all rights and grounds for protest of the County's execution, handling, or implementation of the prequalification process. Determination by County of protests that are properly and timely noticed in accordance with this Section 5.2 shall be made by County based on the information submitted as part of the protest and without the necessity of a hearing.

5.3 Bid Closing. The date for submission of Bids for a Contract subject to this Prequalification shall not be delayed or postponed to allow for completion of the processing of an appeal or protest.

ATTACHMENT NO. 1

VERIFICATION

STATE OF CALIFORNIA, COUNTY OF _____

I have read the foregoing **BEST VALUE PREQUALIFICATION QUESTIONNAIRE (including, without limitation all attached pages)** and know its/their contents.

- The matters stated in the foregoing document are true of my own knowledge except as to those matters, which are stated, on information and belief, and as to those matters, I believe them to be true.
- I am ___ an officer ___ a partner ___ a member ___ the sole proprietor of _____, a _____, and am authorized to make this verification for and on its behalf, and I make this verification for that reason.
 - I am informed and believe, and on that ground allege that the statements made in the foregoing document are true.
 - The matters stated in the foregoing document are true of my own knowledge except as to those matters, which are stated, on information and belief, and as to those matters, I believe them to be true.

Executed on _____ (date), at _____ (city), California.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Type or Print Name

Signature

ATTACHMENT NO. 2

AUTHORIZATION TO RELEASE INFORMATION

The undersigned hereby authorizes and consents to the San Bernardino County ("County") obtaining information from third parties, including, but not limited to, any individual(s) or individual representative(s) of any firm(s), entity(ies) or organization(s) listed in Applicant's Prequalification Submittal, for the purpose of verifying the information provided or for any other purpose related to the evaluation of Applicant's qualifications. To ensure the effectiveness of the prequalification process, such individuals must be able to speak frankly and openly. Accordingly, the undersigned hereby fully and unconditionally releases and discharges the third party individuals, and the firms, entities and organizations they represent, from any claim or liability relating to information provided by it/him/her/them to the County in connection with the processing, investigation and evaluation by County of Applicant's Prequalification Submittal.

Company

Name

Signature

Title

Date

ATTACHMENT NO. 3

STANDARDIZED PROJECT REFERENCE INTERVIEW QUESTIONS

The following questions will be used to conduct interviews concerning past performance by Applicant on a project listed by Applicant as a Project Reference in its responses to Part VI of the Prequalification Questionnaire. The County will conduct the interviews in accordance with the rules set forth in Part VI of the Prequalification Questionnaire. No action on Applicant's part is necessary. These questions are included in the package for information purposes only.

First, please give a brief description of the project listed as one of Applicant's Project References.

1. On a scale of 1-10, with 10 being the best, did the contractor provide adequate personnel? (Max. 10 points)
2. On a scale of 1-10, with 10 being the best, did the contractor provide qualified supervision? (Max. 10 points)
3. On a scale of 1-10, with 10 being the best, was there adequate equipment provided on the job? (Max. 10 points)
4. On a scale of 1-10, with 10 being the best, was the contractor timely in providing reports and other paperwork, including change order paperwork and scheduling updates? (Max. 10 points)
5. Was the project completed on time? (10 points if the answer is "Yes").
Or, if the answer is "no," on a scale of 1-9, with 9 representing the least responsibility, to what extent was the contractor responsible for the delay in completion?
6. On a scale of 1-10, with 10 being the best, rate how the contractor performed in the area of turning in Operation & Maintenance manuals, completing as-built drawings, providing required training and taking care of warranty items? (Max. 10 points)
7. On a scale of 1-10, with 10 being the best, rate the contractor on whether there were a low number of claims, despite the complexity of the project, and how easy it was to resolve them. (Max. 10 points)
8. On a scale of 1-10, with 10 being the best, how would you rate the quality of the contractor's performance overall? (Max. 10 points)



Campaign Contribution Disclosure (SB 1439)

DEFINITIONS

Actively supporting the matter: (a) Communicate directly with a member of the Board of Supervisors or other County elected officer [Sheriff, Assessor-Recorder-Clerk, District Attorney, Auditor-Controller/Treasurer/Tax Collector] for the purpose of influencing the decision on the matter; or (b) testifies or makes an oral statement before the County in a proceeding on the matter for the purpose of influencing the County's decision on the matter; or (c) communicates with County employees, for the purpose of influencing the County's decision on the matter; or (d) when the person/company's agent lobbies in person, testifies in person or otherwise communicates with the Board or County employees for purposes of influencing the County's decision in a matter.

Agent: A third-party individual or firm who, for compensation, is representing a party or a participant in the matter submitted to the Board of Supervisors. If an agent is an employee or member of a third-party law, architectural, engineering or consulting firm, or a similar entity, both the entity and the individual are considered agents.

Otherwise related entity: An otherwise related entity is any for-profit organization/company which does not have a parent-subsidary relationship but meets one of the following criteria:

- (1) One business entity has a controlling ownership interest in the other business entity;
- (2) there is shared management and control between the entities; or
- (3) a controlling owner (50% or greater interest as a shareholder or as a general partner) in one entity also is a controlling owner in the other entity.

For purposes of (2), "shared management and control" can be found when the same person or substantially the same persons own and manage the two entities; there are common or commingled funds or assets; the business entities share the use of the same offices or employees, or otherwise share activities, resources, or personnel on a regular basis; or there is otherwise a regular and close working relationship between the entities.

Parent-Subsidiary Relationship: A parent-subsidiary relationship exists when one corporation has more than 50 percent of the voting power of another corporation.

Contractors must respond to the questions on the following page. If a question does not apply respond N/A or Not Applicable.

1. Name of Contractor:

2. Is the entity listed in Question No. 1 a non-profit organization under Internal Revenue Code section 501(c)(3)?

Yes If yes, skip Question Nos. 3 - 4 and go to Question No. 5.

No

3. Name of Principal (i.e., CEO/President) of entity listed in Question No. 1, if the individual actively supports the matter and has a financial interest in the decision:

4. If the entity identified in Question No.1 is a corporation held by 35 or less shareholders, and not publicly traded ("closed corporation"), identify the major shareholder(s):

5. Name of any parent, subsidiary, or otherwise related entity for the entity listed in Question No. 1 (see definitions above):

Company Name	Relationship

6. Name of agent(s) of Contractor:

Company Name	Agent(s)	Date Agent Retained (if less than 12 months prior)

7. Name of Subcontractor(s) (including Principal and Agent(s)) that will be providing services/work under the awarded contract if the subcontractor (1) actively supports the matter and (2) has a financial interest in the decision and (3) will be possibly identified in the contract with the County or board governed special district:

Company Name	Subcontractor(s):	Principal and/or Agent(s):

8. Name of any known individuals/companies who are not listed in Questions 1-7, but who may (1) actively support or oppose the matter submitted to the Board and (2) have a financial interest in the outcome of the decision:

Company Name	Individual(s) Name

9. Was a campaign contribution, of more than \$250, made to any member of the San Bernardino County Board of Supervisors or other County elected officer within the prior 12 months, by any of the individuals or entities listed in Question Nos. 1-8?

No If **no**, please skip Question No. 10. Yes If **yes**, please continue to complete this form.

10. Name of Board of Supervisor Member or other County elected officer: _____

Name of Contributor: _____

Date(s) of Contribution(s): _____

Amount(s): _____

Please add an additional sheet(s) to identify additional Board Members or other County elected officers to whom anyone listed made campaign contributions.

By signing below, Contractor certifies that the statements made herein are true and correct. Contractor understands that the individuals and entities listed in Question Nos. 1-8 are prohibited from making campaign contributions of more than \$250 to any member of the Board of Supervisors or other County elected officer while this matter is pending and for 12 months after a final decision is made by the County.

Signature

Date

Print Name

Print Entity Name, if applicable