

REQUEST FOR PROPOSALS (RFP)

**RFP 25-05MB:
AS-NEEDED ROOFING MAINTENANCE SERVICES**



Procurement Services

***San Diego Unified Port District
1400 Tidelands Avenue
National City, CA 91950***

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KEY RFP DATES

Issued:	March 5, 2025
Information Exchange Meeting:	March 12, 2025 @ 10:00 AM
Submit Questions By:	March 19, 2025 @ 2:00 PM
Proposals Due By:	April 9, 2025 @ 2:00 PM
Tentative Oral Interviews:	April 28, 29, 30, 2025
Board Date (if applicable):	June 10, 2025
Tentative Project Start:	July 1, 2025

(All Times Listed are Pacific Time Zone)

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I. INTRODUCTION

A. District Background

1. The San Diego Unified Port District (commonly referred to as the "District") is a public benefit corporation established in 1962 by an act of the California State legislature and ratified by the voters of the five member cities of the District. The enabling legislation and subsequent amendments conveyed certain tide and submerged lands within San Diego Bay and the oceanfront within the City of Imperial Beach to a District administration to further the development of commerce, navigation, fisheries and recreation on behalf of the state of California, which owns these lands. The lands are conveyed to the District as a trustee of the state.
2. The District's five member cities are Chula Vista, Coronado, Imperial Beach, National City and San Diego. The District's jurisdiction covers waterfront property within these cities and approximately 2,500 acres of land and 3,400 acres of water.
3. Additional information about the District can be found by visiting its web site at <http://www.portofsandiego.org>.

II. SCOPE OF SERVICES

A. General Information

Service Provider shall provide As-Needed Roofing Maintenance Services at the San Diego Unified Port District (District) facilities and properties within the Cities of San Diego, Coronado, National City, Chula Vista, and Imperial Beach.

Services shall include, but are not limited to, roofing inspection and reports, and maintenance of the roofing system. Maintenance shall consist, but is not limited to, resealing of flashing, sealing of holes, roof drainage maintenance, maintenance repairs to metal roofing, flat roofing, single-ply roofing, skylights, clay tiles, composite asphalt shingles, wood shingle tiles, wood shakes, and built-up or cracked TPO membrane.

In addition to the services outlined above, the Service Provider may be required to perform other roofing-related tasks that are necessary for the proper maintenance, preservation, or enhancement of District properties. These additional services may include but are not limited to roof modifications or retrofitting to accommodate new equipment installations (e.g., HVAC, solar panels, etc.), structural reinforcements or repairs due to unforeseen conditions, or specialty roofing services for unique materials and any other roofing maintenance, repair, or enhancement services requested by the District that fall within the general scope of roofing maintenance but are not explicitly listed above.



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The unit prices in the fee schedule shall include full compensation for all labor, materials, supervision, equipment, tools, cleanup, travel time, and incidentals required to perform roofing maintenance services, unless otherwise specified and agreed upon for additional services.

Service Provider is required to have a minimum of two (2) people with valid TWIC badges to support this Agreement. Failure to comply with this may result in invoice deductions and or termination of the Agreement.

Service Provider shall move, cover, or protect any structures or equipment that may be damaged during roofing maintenance services. Service Provider shall remove from tidelands all materials, tools, equipment, debris, and coverings upon completion of services.

While working on District property, Service Provider's employees shall wear uniforms with appropriate company name and logo. Service Provider's vehicles shall be clearly marked with the appropriate company name and logo.

B. Safety

Service Provider shall abide by all local, state, federal, Cal/OSHA, OSHA, and District safety codes, policies, and procedures. Service Provider will be responsible for fines incurred if not in compliance with all the above regulations. Before the start of work, the Service Provider shall post temporary signs and provide barricades to safely protect the public in places approved by the District Representative. Service Provider shall remove all signs and barricades at the completion of the service. Service Provider shall follow current Caltrans traffic control guidelines when performing service as applicable.

1. The Service Provider shall be responsible for initiating, maintaining, and supervising all safety precautions and programs in connection with the performance of the services provided.
2. Service Provider shall give notices and comply with all applicable laws and regulations of any public body having jurisdiction for the safety of persons or property to protect them from damage, injury, or loss, and shall erect and maintain all necessary safeguards for such safety and protection.
3. Material usage shall be accomplished with strict adherence to California Division of Industrial Safety, or other governing regulations, and all manufacturers' warnings and application instructions listed on the Safety Data Sheet and on the product container label.
4. Injury & Illness Prevention Program (IIPP): Service Provider shall prepare and submit to the District's Representative, one (1) copy of their IIPP that



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addresses all the actions necessary to establish a safe working environment, at the kickoff meeting. It is the Service Provider's responsibility to take all reasonable precautions to ensure the safety of the public, the District's employees and to comply with the Agreement. It is the Service Provider's responsibility to establish and maintain safe onsite working conditions for the duration of the project.

C. Environmental

1. All San Diego Port District Tidelands are regulated under Regional Water Quality Control Board Order No. R9-2013-0001, National Pollutant Discharge Elimination System (NPDES) Permit No. CAS0109266, Waste Discharge Requirements for Discharges of Urban Run-off from the Municipal Separate Storm Sewer Systems (MS4s) Draining the Watersheds of the County of San Diego, the Incorporated Cities of San Diego county, and the San Diego Unified Port (Municipal Permit), as adopted, amended, and/or modified. The Municipal Permit prohibits any activities that could degrade stormwater quality. All service to be completed as part of the Agreement must comply with all Municipal Permit requirements and District direction related to contracted work including the following requirements:
 - a. No discharges of any material may enter the storm drain system or receiving water (San Diego Bay) including water, wash water, dust, petroleum products, soil, or debris. Service Provider must immediately remove any such material that inadvertently enters the storm drain system and immediately notify District staff.
 - b. If any activity could potentially release materials to the storm drain system or the bay, the District Representative must be notified prior to activity and appropriate protection of the storm drain system shall be implemented. All storm drain protection systems must minimize the discharge of pollutants and be adequately maintained.
 - c. Any materials being stored which could release constituents by wind or run-off transport shall be protected by overhead cover, secondary containment, tarpaulins, or other appropriate methods.
 - d. Best Management Practices (BMPs) must be implemented to prevent water, wash water, and/or debris from being tracked or transported off of the service site.
 - e. Any fuel products, lubricating fluids, grease or other products and/or waste released from Service Provider's vehicles or equipment, shall be collected, and disposed of immediately in accordance with state, federal, and local laws.

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- f. All job-site waste materials will be properly disposed of at the completion of service including unsalvageable materials that may have been in the storm drain conveyance system.
- g. Service Provider shall ensure that all employees are trained on the nature and implementation of the special provisions outlined above. This training shall include identifying the location of the storm drains on the job site, highlighting the proximity of the bay and the direct connection between the storm drain and the bay, and identifying all BMPs to be implemented to prevent the discharge of pollutants to the storm drain conveyance system or the bay.

District staff may conduct a storm water inspection to verify that BMPs are properly implemented at any time during the project. Additional BMPs may be recommended or required to eliminate or prevent discharges to the stormwater conveyance system or the receiving water. Failure to comply with District directives regarding stormwater pollution prevention may result in enforcement that may include a fine.

- 2. Environmentally Preferable Products - In alignment with the District's Green Port Policy, the District will strive to minimize environmental impacts directly attributable to operations on San Diego Bay and the tidelands. In alignment with this Policy, the District has established criteria for the procurement of environmentally preferable products.

Accordingly, where practicable and cost effective, Service Provider shall use:

- a. Products that produce less waste and are shipped in minimal packaging. Packaging should be recyclable or compostable where possible.
- b. Products and equipment configured for reduced noise levels.
- c. Cleaning and disinfecting products that meet Green Seal certification at all District facilities. All cleaning and power washing products claiming Green Seal certification, shall be required to bear this certification. Products recognized by the Environmental Protection Agency's (EPA) Safer Detergents Stewardship Initiative, or the Design for the Environment Program are not required to be Green Seal certified. More information is available at www.greenseal.org and www.epa.gov/dfe. Germicidal detergents needed to perform services under this Agreement are not required to be Green Seal certified. Service Provider shall only use District approved equipment, materials, and supplies and shall comply with the District's Environmental Sustainability Policy.
- d. Products that meet Green Seal certification for all services rendered under this Agreement. All products claiming Green Seal certification shall be required to bear this certification. More information is available at www.greenseal.org and www.epa.gov/dfe.



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The District may permit the substitution or addition of environmentally preferable products when such products are readily available at a competitive cost and satisfy the District's performance needs. The District may choose to provide any environmentally preferable products for Service Provider's use during services rendered under this Agreement.

D. Execution

1. **Task Authorization** – As-Needed Roofing Maintenance Services shall be undertaken by the Service Provider only upon issuance of a Task Authorization issued by the District for said services. Service Provider shall not perform services until the District Representative provides a written Task Authorization specifically indicating the scope and negotiated cost for As-Needed Roofing Maintenance Services. A Task Authorization shall not be considered effective until the form has been signed by the District. Urgent services may be required and will be authorized by the District's Representative. A Task Authorization will be issued for urgent work the next business day. A Task Authorization shall be signed within two (2) business days of receipt. The District does not guarantee a minimum or total amount of as-needed services under this Agreement.
2. Service Provider shall ensure that all materials, supplies, and equipment are suitable for the job and that they will not harm the surfaces on which they are used. The District reserves the right to reject any equipment, material, and supplies the Service Provider may propose to use under this Agreement.
3. **Roof Assessment Reports** – At the request of the District Representative, the Service Provider shall provide a detailed roof inspection report before a Task Authorization is issued.
 - a. **Roof Inspection Report** – Service Provider shall provide the District with a detailed roof inspection report with findings and recommendations for each location. The report should be sent electronically within ten (10) business days of the inspection. The report shall include a fully burdened deficiency maintenance assessment report.
 - b. **Storm Inspection and Report** – Within 3 days of any rain event, the Service Provider shall complete, at the District's request after damaging weather event(s), a visual roof inspection noting any conditions that may affect the roofing system's performance. Service Provider shall immediately advise the District of the potential damage that may have occurred to the roof system or related components due to the presence of severe weather and follow up promptly with a written summary report.
 - c. **Asbestos Survey Inspection/Report** – Service Provider shall provide, at the District's request, a detailed asbestos survey. The District will make available



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to the Service Provider, at the beginning of each assignment, asbestos survey reports of District-owned buildings. In most cases where ACRM is present, it is located along parapet walls and along roof edges within the existing roof flashing material.

4. **Scheduled Maintenance Services** – The Service Provider shall maintain damaged and/or deteriorated roofing systems as directed by the District Representative. Maintenance shall consist, but not be limited to, the following:
- a. Reseal base flashing.
 - b. Maintenance repair of the cracked roof membrane.
 - c. Apply coating to the foam between pipe sleeves and oversized holes in the parapet.
 - d. Install a hood over any open pipe penetrations to prevent water infiltration.
 - e. Reseal any corners, laps, and patches around HVAC units.
 - f. Seal holes around HVAC units.
 - g. Reseal mechanical equipment with a reinforcing mesh and roofer mastic.
 - h. Reseal pitch pans and slope with material to drain water from the pan around the air handler.
 - i. Seal all holes in abandoned frame supports and other abandoned pads.
 - j. Ensure all steel frames have proper support.
 - k. Secure all screws in the hoods of mechanical vents.
 - l. Reseal vent flashings.
 - m. Reseal joints in the stairwell walls.
 - n. Reseal the attachment between the rooftop pipes along the parapet to the base flashing.
 - o. Clean and recoat the elastomeric coating applied on the inside of the parapet walls.
 - p. Align the condensate line to drain into the roof drain.
 - q. Add rocks to areas where rocks are missing on the roof.
 - r. Replace unfilled pitch pans that are being used at Unistrut support with suitable sleepers.
 - s. Replace all sleepers and curbs made of absorptive material with non-absorptive material and place them on support pads.
 - t. Reapply sealant at HVAC units, HVAC ducts, pipe penetrations, pitch pans, and panel joints.
 - u. Replace all walk pads that are deteriorated.
 - v. Support communication equipment on approved curbs or sleepers.
 - w. Remove all debris including buckets, wood, cable, pump, sand, pallets, and steel beams.



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5. **Asbestos Abatement**. Service Provider shall perform work by following CAL OSHA Asbestos Abatement Guidelines. Service Provider and or subcontractor shall be a California State Licensed Asbestos Abatement Contractor.

E. Service and Response Time

Service Provider shall provide As-Needed Roofing Maintenance Services that meet the following response times:

1. **Scheduled Maintenance Service** - All scheduled maintenance services shall be coordinated with the District Representative between the hours of 7:00 a.m. and 4:00 p.m., Monday through Friday. Scheduled services shall be performed Monday through Friday between the hours of 7:00 a.m. and 5:00 p.m.
2. **Re-work**—The District Representative shall inspect the quality of service, and if requested by the District Representative, the Service Provider shall correct the service deficiencies at no additional cost to the District.

F. Submittals

Service Provider shall provide the following submittals to the District Representative, at the scheduled kick-off meeting.

1. **Injury and Illness Prevention Program (IIPP)** - The Service Provider shall provide one (1) copy of the IIPP that addresses all the actions necessary to establish a safe working environment.

G. Security Background Check and Badging

The District may require Service Provider's personnel to pass a security background check and wear a badge while on District property. Service Provider's personnel who do not initially pass the security check, or who subsequently have their security clearance withdrawn for any reason, shall not perform services under this Agreement.

The District reserves the right to limit the number of employees for security background check and badging. Upon request, Service Provider shall submit to the District Representative within a minimum of seventy-two (72) hours a list of employees with security and badging clearance and maintain an updated list. Service Provider shall return all badges of terminated or terminating employees within seventy-two (72) hours of notice.

Service Provider shall abide by all security requirements necessary to perform the services without compensation from the District.

Transportation Workers Identification Credential (TWIC) each Service Provider's personnel that render services on secure areas of District facilities must obtain and



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present a TWIC for entry to secure areas at: Tenth Avenue Marine Terminal, National City Marine Terminal, B Street Pier and Broadway Pier facilities.

An individual must provide biographic and biometric information such as fingerprints, sit for a digital photograph and successfully pass a security threat assessment conducted by the US Department of Homeland Security, Transportation Security Administration.

Service Provider shall pay for all fees and costs incurred by Service Provider and its personnel to obtain a TWIC. Service Provider shall not be entitled to reimbursement from the District for said fees and costs.

Additional information pertaining to the TWIC requirement is also available in the US Department of Homeland Security, Transportation Security Administration website, www.tsa.gov/twic.

H. Licensing and Certification

Service Provider shall possess a California State Contractor's License, Roofing (C-39) and Asbestos Abatement (C-22) Classification. A copy of the license or certification shall be provided at the kickoff meeting.

I. Warranty

Upon completion of the service, Service Provider shall submit a copy or description of the workmanship warranty for each item. The warranty shall specify in detail the length and terms of the warranty/maintenance and service, contact name and telephone number of Service Provider and any subcontractors.

J. Damages

Service Provider shall repair, replace and/or restore to its original condition any lost, misplaced, or damaged District property caused by the Service Provider's operations, at no additional cost to the District.

Service Provider shall ensure that all materials, supplies, and equipment are suitable for the job and that they will not harm the surfaces on which they are used. The District reserves the right to reject any equipment, material, and supplies the Service Provider may propose to use under this Agreement.

K. Deductions

If Service Provider fails to meet a response time or fails to perform a service, Service Provider agrees to a five percent (5%) deduction off the total invoice. If the failed service is the result of District operations beyond the Service Provider's control, no deduction will be applied. The removal or application of deductions will be at the



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discretion of the District Representative based on validation of the circumstances and will be communicated to the Service Provider in writing.

L. Billing and Tracking

Billing and tracking are through electronic methods. Invoices shall be emailed to GS_invoices@portofsandiego.org and Agreement Manager. Invoice shall be submitted within five (5) business days for monthly service fees and within seven (7) days of the completion of work performed under a Task Authorization.

All invoice error issues must be resolved within one billing cycle. Charges that are brought to District's attention after thirty (30) days may be denied at no risk to the District. No additional fuel surcharges or administration fees will be allowed, and the entire invoice will be returned until corrected. Revised invoices are to be resubmitted with a new invoice date.

III. INSTRUCTIONS TO PROPOSERS

- A. Vendor Registration and eBid System. The San Diego Unified Port District has implemented an electronic bidding (eBid) system which has a vendor registration component. All Service Providers are encouraged to register and any Service Providers who wish to provide a proposal for this RFP or other District solicitations are required to register. To register with the District as a Vendor, please visit the District website, www.portofsandiego.org and click on Business/Register as a Vendor. For questions and/or comments, please contact the District's Procurement Services Department at 619-686-6392.
- B. Information Exchange Meeting. The District will conduct an **Information Exchange Meeting on March 12, 2025 @ 10:00 AM via dial-in 619-535-7686 / phone conference ID 338 466 655#**. The purpose of this meeting is to cover the requirements to submit your proposal, the Equal Opportunity Program requirements and to give a brief review of the Scope of Services. The Information Exchange Meeting is not mandatory, however, all prospective Proposers are encouraged to attend.
- C. Examination of Proposal Documents. By submitting a proposal, the Proposer represents that it has thoroughly examined and become familiar with the work required under this RFP, and that it can perform quality work to achieve District's objectives.
- D. Questions. Questions or comments regarding this RFP must be submitted electronically to our eBid system where the RFP was downloaded and must be received by District no later than **March 19, 2025 @ 2:00 PM**. All electronic questions must be received by this time. Responses from the District will be communicated via the eBid system to all recipients of this RFP. Inquiries received after the date and time stated above will not be accepted.



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- E. Addenda. If changes to the RFP are required, the District will issue an addendum to all Proposers via the eBid system. All Proposers will receive an email notifying them that an addendum has been issued. **All Addenda, if any, must be acknowledged via the eBid system.**
- F. Electronic Submission of Proposals
1. All Proposers are required to submit their proposals electronically via the electronic eBid system they downloaded this RFP. The maximum file size for proposal is 150 megabytes, and the file type shall be Portable Document Format (PDF). The electronic system will close submission exactly at the date and time set forth in this RFP or as changed by addenda. An electronic copy of the firm's proposal must be attached to the electronic system.
 2. Proposers are responsible for submitting and having their proposal accepted before the closing time set forth in this RFP or as changed by addenda. NOTE: Pushing the submit button on the electronic system may not be instantaneous; it may take time for the Proposer's documents to upload and transmit before the proposal is accepted. It is the Proposer's sole responsibility to ensure their document(s) are uploaded, transmitted, and arrive in time electronically. The District will have no responsibility for proposals that do not arrive in a timely manner, no matter what the reason.
- G. Required Documents
1. The proposal must contain the following items placed in the order listed:
 - a. Attachment A, Statement of Qualifications
 - b. Attachment B, Exceptions to Agreement
 - c. Attachment C, Fee Schedule
 - d. Attachment D, Proposer's Sub-Service Providers
 - e. Attachment E, Equal Opportunity Program Bonus Points
 - f. Attachment F, Statement Regarding Diversity, Equity, and Inclusion
 - g. Attachment G, Employment and Ownership Report
 - h. Attachment H, Proposal Response Form
 - i. Proposal Package (See Section V)
 2. The District will conduct a preliminary review of the proposals to determine if the above items are included as required in the RFP. If a proposal does not include all items fully completed, the proposal may be considered not responsive.
- H. Agreement Type



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1. The Agreement services shall be compensated on a negotiated basis as established in the Fee Schedule. The anticipated start July 1, 2025.
2. An example of the Service Agreement to be executed with the successful Proposer can be found in the document list for this RFP on the [eBid site](#). Proposers shall be prepared to accept the terms and conditions stated in this RFP, Scope of Services, Insurance, Indemnity, and the Sample Agreement. If a Proposer desires to take exception to the Agreement, Proposer shall provide the following information in Attachment B, Exceptions to Agreement. At the discretion of the District, exceptions not called out in Attachment B will not be negotiable after the due date for submission of proposals.
 - a. Proposer shall clearly identify each proposed change to the Agreement, including all relevant Attachments.
 - b. Proposer shall furnish the reasons therefore as well as specific recommendations for alternative language.
3. The above factors will be considered in evaluating Proposals. Proposals that take exceptions to the Agreement or proposed compensation terms may be determined by District, at its sole discretion, to be unacceptable and no longer considered for award.

I. Rights of District

1. This RFP does not commit the District to enter into an Agreement, nor does it obligate the District to pay for any costs incurred in preparation and submission of proposals or in anticipation of an Agreement. District may investigate the qualifications of any Proposer under consideration, require confirmation of information furnished by the Proposer, and require additional evidence or qualifications to perform the Services described in this RFP.
2. District reserves the right to:
 - a. Reject any or all proposals.
 - b. Issue subsequent Requests for Proposals.
 - c. Postpone opening for its own convenience.
 - d. Remedy technical errors in the Request for Proposals process.
 - e. Approve or disapprove the use of particular Proposer's Sub-Service Providers.
 - f. Negotiate with any, all, or none of the Proposers.
 - g. Solicit best and final offers from all or some of the Proposers.
 - h. Award an Agreement to one or more Proposers.
 - i. Accept other than the lowest offer.
 - j. Waive informalities and irregularities in proposals.



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- J. Collusion. By submitting a proposal, each Proposer represents and warrants that its proposal is genuine and not a sham or collusive or made in the interest of or on behalf of any person not named therein; that the Proposer has not directly or indirectly induced or solicited any other person to submit a sham proposal, or any other person to refrain from submitting a proposal; and that the Proposer has not, in any manner, sought collusion to secure any improper advantage over any other person submitting a proposal.
- K. Withdrawal of Proposals. A Proposer may withdraw their proposal before the expiration of the time for submission of proposals by going to the eBid system and removing their submission.

IV. PROPOSERS' MINIMUM QUALIFICATIONS

- A. General Qualifications. The Proposer shall have sufficient experience in and comprehensive knowledge of services as required in the Scope of Services.
- B. Specific Qualifications. The successful Proposer(s) must have a licensed California State Contractor's License, Roofing (C-39) and Asbestos Abatement (C-22) Classification in order to submit a proposal for this solicitation.

V. PROPOSAL PACKAGE INSTRUCTIONS

- A. Format
1. Proposers shall include the required items stated in Section III Instructions to Proposers, Paragraph G, Required Documents.
 2. Proposals shall be (1) in printed text, (2) as brief as possible, and (3) not include any unnecessary promotional material.
 3. For ease of handling, it is requested that standard 8 -1/2 x 11" size pages be used and that the proposal shall be submitted in Portable Document Format (PDF) format. **THE PROPOSAL SHALL BE ONE DOCUMENT ONLY.**
 4. The nature and form of response are at the discretion of those responding, but shall include the information listed below.
- B. Content
1. Proposal Cover Letter. The Proposer shall submit a proposal cover letter that summarizes why the Proposer believes they should be selected by the District to provide services as described in this RFP.

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2. Approach to the Project. The Proposer shall present a well-conceived work plan that establishes the Proposer's understanding of, and ability to satisfy, District's objectives and work requirements. Proposer shall succinctly describe the proposed approach for addressing the required work, outlining the activities that would be undertaken in completing the various tasks, and specifying who would perform them. Include a timetable for completing all work specified in the Scope of Services. The Proposer may also suggest technical or procedural innovations that have been used successfully on other projects and which may facilitate the completion of this project.
3. Capability to Perform
 - a. Ability to complete work within required time. Availability and continuity of staff during course of the project.
 - b. This section shall include a brief description of the Proposer and Sub-Service Provider's qualifications and previous experience on similar or related projects. Description of pertinent project experience shall include a summary of the work performed, the total project cost, the percentage of work the firm was responsible for, the period over which the work was completed, and the name, title, and phone number of clients to be contacted for references (provide References in Attachment A). Give a brief statement of the firm's adherence to the schedule and budget for each project.
4. Fair and Reasonable Cost Information
 - a. Proposer shall submit Attachment C, Fee Schedule, as directed in Section III, Instructions to Proposers, Paragraph G, Required Documents.
 - b. The District reserves the right to consider the financial responsibility and general complexity of each Proposer, as well as its reputation within the industry to determine if the Proposer has the apparent ability to meet and complete successfully the requirements of the work. Upon request, the Proposer shall provide a financial statement, audited if necessary, in addition to any other information requested by the District.
 - c. Proposer's entire rate sheet to be submitted as part of the Proposal Package and it may or may not be included as part of the resulting agreement(s). Only the labor rates for the labor classifications in Exhibit A will be used for evaluation in the Fair and Reasonable Cost evaluation criteria.



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5. Firm's Relevant Experience. The Proposer should describe its relevant experience in each of the following areas:
 - a. Description of services similar to those proposed above, and with ongoing appropriate contracts to agencies of comparable size to the District.
 - b. Experience in each of the areas noted in the Scope of Services.
 - c. This section shall include a brief description of the firm's size as well as the local organizational structure; and a discussion on the firm's financial stability, capacity, and resources.

VI. EVALUATION AND SELECTION

- A. Evaluation Criteria/Matrix. The following criteria and matrix shall be used to evaluate proposals:
 1. Approach to the Project. Demonstrated understanding of the District's needs and solicitation requirements. Approach is well organized and presented in a clear, concise and logical manner. Availability and proposed use of technology and methodologies. Quality control and thoroughness is well defined.
 2. Capability to Perform. Ability to complete work within deadlines. Availability and continuity of staff during the course of the agreement, if selected. Unsatisfactory past performance with the District may be considered as determined by the District in its sole and absolute discretion. Such determination may be based on Cure Notices, Performance Deficiency Notices, Termination Letters, or such other oral or written evidence of performance as the District may deem relevant from time to time in making such determination.
 3. Fair and Reasonable Cost. Reasonableness of labor rates submitted and competitiveness of these rates with other rates submitted.
 4. Firm's Relevant Experience. Experience in performing similar services for organization of similar size to the District. Experience with public agencies. Years of experience with these types of services.
- B. Equal Opportunity Program Bonus Points: The following criteria shall be used to evaluate Proposer's Equal Opportunity Program based on specific criteria identified below. Proposers shall be eligible for bonus points on the following criteria: ADA Scope Enhancement, Staffing, Veterans Staffing, and Small Business Enterprise (SBE) Participation. Proposers can receive up to 20 total bonus points under the Equal Opportunity Program.



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1. ADA Scope Enhancement: The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has included ADA Enhancements that are above the minimum requirements and within the scope of services, including taking into consideration Universal Design. The Proposer shall submit written documentation to support their ADA Enhancements for District's review and consideration.
2. Staffing. The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has staff with disabilities as defined by the ADA, or that has included one or more Disabled Veteran Business Enterprise (DVBE) participant(s). The Proposer shall submit DVBE certification documentation and list workforce data reporting number of total employees with disabilities as defined by the ADA.
3. Veteran's Status. The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has Veteran's status or has staff with Veteran's status. Documentation of a firm's Veteran's status must be provided or workforce statistical data reporting number and percentage of total employees with Veteran's status is required.
4. Small Business Enterprise (SBE) Participation (See Section VII.C.4.) The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has SBE status. Documentation of a firm's SBE status must be provided for SBE Bonus Points. If claiming SBE status, indicate, as applicable, on Attachment A, Question D (for prime Proposer) and/or on Attachment D (for Sub-Service Providers).

C. Evaluation Procedure

1. A Selection Review Panel, generally made up of District staff, will review the proposals and establish a list of finalists based on pre-established review criteria. The names of the Selection Review Panel members are not revealed prior to the interviews. The Selection Review Panel may interview the finalists. If interviews are conducted, the Proposer should allow approximately 1 hour for the oral interview and a question and answer session. The Project Manager must lead a 10-12 minute presentation before the Selection Review Panel.
2. Interviews may be conducted on April 28, 29, 30, 2025. Each Proposer is asked to keep these dates open. No other interview dates will be provided.
3. The Selection Review Panel will evaluate the proposals. The rating and evaluation forms prepared by Panel members will not be revealed. The



scores in the evaluation matrix shown below **DO NOT** indicate a “winning score” and the highest score is not guaranteed selection. The final decision is at the discretion of the District and is based on the scores, reference checks, negotiated pricing, and further analysis of the proposals including any risks associated with selecting any proposal.

Evaluation Criteria	Weight	Firm A		Firm B		Firm C	
		Score	Total	Score	Total	Score	Total
Approach to the Project	9						
Capability to Perform	8						
Fair and Reasonable Cost	7						
Firm's Relevant Experience	6						
Totals							
ADA Scope Enhancement							
DVBE/Disabled Staff							
Veterans Status							
SBE Participation							
Grand Total							

- D. Award. When the Selection Review Panel has completed its work, the District may negotiate for the extent of services to be rendered and the method of compensation. Because District may award without conducting negotiations, the proposal submitted shall contain the Proposer’s most favorable terms and conditions.

VII. EQUAL OPPORTUNITY PROGRAM REQUIREMENTS

- A. Equal Opportunity Contracting Policy Statement
- It is the policy of the San Diego Unified Port District (District) that all businesses be provided equal opportunity to participate in the performance of District contracting and leasing opportunities, and to insure that, workers on public works projects of one thousand dollars (\$1,000) or more are paid the general prevailing rate of per diem wages for regular, holiday, and overtime work as provided by California Labor Code Section 1771.
 - The District is committed to take all necessary and reasonable steps to increase its utilization of small businesses for a positive economic impact to the region. District policy prohibits discrimination against any person because of age (over 40), ancestry, color, disability (mental or physical), gender (including identity, appearance, or behavior, whether or not that identity, appearance, or behavior is different from that traditionally associated with the person's sex at birth), marital status, medical condition, military status, national origin, pregnancy, race,



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religion, sexual orientation, genetic information, or veteran status, in the award or performance of District contracts or leases.

3. The District will create a level playing field on which small businesses can compete fairly for District contracts. This policy will help remove barriers to the participation of small businesses in District contracts and assist in the development of firms to compete successfully in the marketplace outside the District's Equal Opportunity Contracting Program.

B. Americans with Disabilities Act Requirements

1. Americans with Disabilities Act (ADA) Policy

- a. The San Diego Unified Port District (District) does not discriminate on the basis of disability in employment and complies with the ADA, and all other applicable federal, state, and local laws, regarding barrier-free access to all District services, programs, and activities.
- b. In conjunction with BPC Policy No. 361, it is the District's policy not to discriminate against qualified individuals with disabilities in regard to application procedures, hiring, advancement, discharge, compensation, training, or other terms, conditions, and privileges of employment.
- c. An individual with a disability, who can be reasonably accommodated for a job, without undue hardship to the District, will be given the same consideration for that position as any other applicant. Additionally, the District will engage in an interactive process to attempt to reasonably accommodate qualified individuals with disabilities so they can perform the essential functions of a job. All employees are required to comply with safety standards.
- d. The District is committed to ensure all services, programs, and activities are accessible and usable by all individuals except where to do so would result in a fundamental alteration in the nature of the service, program or activity, or in undue financial and administrative burdens.
- e. To ensure high visibility, the District will participate in community outreach events, report on activities that further enhance accessibility, and consider the use of Universal Design, which is the design of products and environments to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design, to support and include people



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with disabilities in all services, programs, and activities as appropriate.

- f. In conjunction with BPC Policy No. 361, the District will promptly investigate all complaints of employment discrimination and barriers to services, programs, and activities, and when appropriate, take effective remedial action to address and remedy any complaints.
- g. The Executive Director will designate person(s) responsible for developing and implementing the District's ADA program and ensuring that District employees, agents, lessees, and Service Providers adhere to the provisions of the ADA program.
- h. The ADA program will be implemented at the same priority as compliance with all other legal obligations incurred by the District.

C. Small Business Enterprise (SBE) Participation

- 1. **NO SBE participation goal** was established for this opportunity. Should sub-participants be utilized, Proposer should make good faith efforts to include small businesses in their solicitation process. SBE eligibility is based on economic size standards determined by number of employees or gross receipts. The SBE Plan recognizes both federal and state size standards for small businesses. Small business concerns can be certified as SBEs by the U.S. Small Business Administration, State of California, Department of General Services, or any U.S. Department of Transportation, Disadvantaged Business Enterprise (DBE) certification using Title 49 Code of Federal Regulations Part 26 criteria.
- 2. The District's Small Business Enterprise Program utilizes external resources in their search for small businesses to participate on contract opportunities. This information is maintained and updated by those sources and their registered clients. Businesses that are registered within these data sources claim they meet the federal or state size standards to qualify as a small business. Please be aware that the District's Small Business Enterprise program does not control or guarantee the accuracy, or completeness of this outside information. Questions regarding a small business size protest should be addressed with the outside source.

NOTE: Equal Opportunity Contracting Certified Small Business data resources are available at www.portofsandiego.org. Click on the Business Tab, then, click on the Equal Opportunity Contracting Information "link", scroll down to the SBE resource links. Click on any



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of the three (3) SBE database resource links. This will provide you with small business sub-participants to contact for sub-contracting opportunities on specific work categories pertaining to this project. If you do not have access to the Internet, please contact Equal Opportunity Contracting in the Human Resources Department at (619) 686-7245.

3. Required SBE Sub Participation Information. Proposer must list all proposed Sub-Service Providers on the enclosed Proposer's Sub-Service Providers form. If any of your sub Service Providers are certified SBE, please provide a copy of their certification.
 4. SBE Participation: The District shall award five (5) bonus points to a firm's total score of the evaluation criteria/matrix when the Proposer is certified as a Small Business Enterprise (SBE), as defined by the Small Business Administration (SBA), or is utilizing one or more SBEs to perform the work required under the agreement. Proposer shall provide SBE verification for their firm and any SBE sub participants to ensure that firms receiving bonus points are eligible.
 5. SBE Verification: The District will require successful Proposer(s) to provide SBE sub participation verification monthly reports for all listed SBE subs included on the Proposer(s) Attachment D-Proposer's Sub-Service Providers form to verify SBE participation commitment levels as measured by total dollars paid to the SBE divided by the total dollars paid to the prime. Monthly reports shall be submitted by email to the Project Labor & Compliance Administrator by the 15th of each month following award at sparsons@portofsandiego.org
- D. Equal Employment Opportunity Policy Statement. It is the policy of the San Diego Unified Port District (District) that all Service Providers and lessees interested in conducting business with the District shall not discriminate against any employee or applicant for employment because of age (over 40), ancestry, color, disability (mental or physical), gender (including identity, appearance, or behavior, whether or not that identity, appearance, or behavior is different from that traditionally associated with the person's sex at birth), marital status, medical condition, national origin, pregnancy, race, religion, sexual orientation, or veteran status, and shall take action to assure applicants are employed, and that employees are treated during employment, without regard to age (over 40), ancestry, color, disability (mental or physical), gender (including identity, appearance, or behavior, whether or not that identity, appearance, or behavior is different from that traditionally associated with the person's sex at birth), marital status, medical condition, national origin, pregnancy, race, religion, sexual orientation, or veteran status.



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E. Equal Employment Opportunity Program Information

1. As prescribed under Board Policy 358, the District requires all consultants, vendors, contractors and lessees to comply with all applicable Federal, State, and local law or regulation relating to equal employment opportunity and nondiscrimination, including any such law, regulation, and policy hereinafter enacted for the promotion of equal employment opportunities and nondiscrimination.
2. Questions regarding Section VII or Americans with Disabilities Act Requirements of this opportunity should be directed to:

Shirley Parsons, Manager
Diversity, Equity, and Inclusion
Phone: (619) 686-7245
E-mail: sparsons@portofsandiego.org

VIII. SERVICE PROVIDER/CONTRACTOR REGISTRATION PROGRAM

- A. In accordance with the provisions of Labor Code section 1771.1. (a) A contractor or subcontractor shall not be qualified to bid on; be listed in a bid proposal, subject to the requirements of Section 4104 of the Public Contract Code, or engage in the performance of any contract for public work, as defined in this chapter, unless currently registered and qualified to perform public work pursuant to Section 1725.5. It is not a violation of this section for an unregistered contractor to submit a bid that is authorized by Section 7029.1 of the Business and Professions Code or by Section 10164 or 20103.5 of the Public Contract Code, provided the contractor is registered to perform public work pursuant to Section 1725.5 at the time the contract is awarded.
- B. No contractor or subcontractor may be listed on a bid proposal for a public works project (submitted on or after March 1, 2015) unless registered with the Department of Industrial Relations pursuant to Labor Code section 1725.5 [with limited exceptions from this requirement for bid purposes only under Labor Code section 1771.1(a)].
- C. No contractor or subcontractor may be awarded a contract for public work on a public works project (awarded on or after April 1, 2015) unless registered with the Department of Industrial Relations pursuant to Labor Code section 1725.5.
- D. This project is subject to compliance monitoring and enforcement by the Department of Industrial Relations.



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- IX. INDEMNIFY, DEFEND, HOLD HARMLESS.** Proposer will indemnify the District as stated in the Sample Agreement, Paragraph 9.
- X. INSURANCE REQUIREMENTS.** Proposer and each Proposer's Sub-Service Provider will at all times during the term of this Agreement maintain, at its expense, the minimum levels and types of insurance as stated in the Sample Agreement, Paragraph 10.
- XI. PROTESTS**
- A. Prior to the closing date for submittal of proposals, Proposer may submit to District protests regarding the procurement process, or alleged improprieties in specifications or alleged restrictive specifications. Such protests shall be filed no later than 10 working days prior to the scheduled closing date. If necessary, the closing date of the solicitation may be extended pending a resolution of the protest. Protests dealing with alleged improprieties in the procurement or the procurement process that can only be apparent after the closing date for receipt of proposals shall be filed within five (5) working days of issuance of the Notice of Recommended Award. Protests shall contain a statement of the grounds for protests and supporting documentation. Protestor will be notified of District's final decision prior to issuance of Award.
 - B. A Proposer may discuss the procurement documents with District. Such discussions, however, do not relieve Proposers from the responsibility of submitting written protests as required.
 - C. Requests and protests shall be addressed to: San Diego Unified Port District, Attn: Matt Earle, Chief Procurement Officer, 1400 Tidelands Avenue, National City, CA 91950.



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ATTACHMENT A
STATEMENT OF QUALIFICATIONS

A proposal to this Request for Proposals (RFP) for providing services as described in the Scope of Services within the jurisdiction of the San Diego Unified Port District (District) in the cities of Chula Vista, Coronado, Imperial Beach, National City, and San Diego, California, will not be considered unless all the information requested in the Statement of Qualifications (questionnaire) is provided by the Proposer. Statements must be complete and accurate. Omissions, inaccuracies, or misstatements may cause the rejection of a proposal or subsequent revocation of the Agreement.

By submission of a proposal, the Proposer authorizes the District to make any inquiry or investigation it deems appropriate to verify or augment the information contained in this questionnaire, and authorize others to release to the District any and all information sought by District in such inquiry or investigation.

Legal Name of Proposer as it will appear on any final Agreement:

Company or Organization Name

Proposer's Representative for purposes of communication relating to this proposal:

Name, Title	Tel. No.	Email

Street	City	State
_____	_____	_____
		ZIP

Proposer's Representative with signature authority for contract documents:

Name, Title	Tel. No.	Email

Street	City	State
_____	_____	_____
		ZIP

(IF DIFFERENT THAN ADDRESS STATED ABOVE)

The Proposer is a (check one):

- () Sole Proprietorship
() Partnership
() Corporation – STATE OF INCORPORATION: _____
() Joint Venture

or Explain if necessary: _____

I, _____ (PRINT NAME), affirm that all the information furnished in and with this questionnaire, is true, complete and correct to the best of my knowledge.

_____ (Signature)	_____ (Date)
----------------------	-----------------



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MINIMUM QUALIFICATIONS

Firms submitting proposals should meet the following minimum qualifications. Please answer “yes” or “no”, and include an explanation, As Needed.

1. Proposer has a liability insurance policy with a policy limit amount as required on the Sample Agreement or a statement from their broker that the Proposer can have such insurance in place after notice of award.

☐ **Yes** ☐ **No**

2. Proposer has current workers' compensation insurance policy as required by the Labor Code or is legally self-insured pursuant to Labor code section 3700 ET. Seq. or is exempt because Proposer has no employees. Proposer has continuously had workers' compensation insurance or state approved self-insurance.

☐ **Yes** ☐ **No** ☐ **Exempt**

3. Proposer has automobile liability insurance policy with a policy limit of at least \$1,000,000 per claim or a statement from their broker that the Proposer can have such insurance in place after notice of award.

☐ **Yes** ☐ **No**

4. At any time during the last five years, has your firm, or any of its owners or officers been convicted of a crime involving the bidding, awarding or performance of a government contract or agreement?

☐ **Yes** ☐ **No**

5. Is your firm currently in a bankruptcy case, in Chapter 11, an applicant for Chapter 11, or an adjudicated bankrupt?

☐ **Yes** ☐ **No**



Proposers should provide the following information relevant to its operations as the basis for evaluation:

6. OTHER REQUIRED PROPOSAL INFORMATION

A. REFERENCES

Provide a list, including names, addresses, and phone numbers of at least three (3) clients that your firm has served within the last two (2) years with a scope of service similar to this RFP. By providing references, you are authorizing the District to contact such clients for an appraisal of the services they received from your firm.

Client Name, Address, Email and Phone Number	Number of Years performing similar scope of services	Describe services provided

B. PENDING LITIGATION

Are you, or any of the principals in your organization holding more than a 10% interest, presently a party to any pending litigation, liens, claims or judgments?

☐ Yes ☐ No

If yes, provide detailed information for each action. Include a listing of any lawsuit or litigation and the result of that action resulting from (a) any public project undertaken by the Proposer or by its Sub-Service Providers where litigation is still pending or has occurred within the last five years or (b) any type of project where claims or settlements were paid by the Proposer or its insurers within the last five years.



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C. CONFLICT OF INTEREST

Does the company have any existing or potential conflicts of interest with the District?

☐ Yes ☐ No

If yes, attach a statement detailing the conflicts of interest.

D. SMALL BUSINESS ENTERPRISE (SBE) BONUS POINTS

Is the Proposer claiming Small Business Enterprise (SBE) Bonus Points?
Note: This is for prime Proposer only. If claiming SBE Bonus points for Sub-Service Providers, indicate so on Attachment D.

☐ Yes ☐ No

If yes, indicate SBE type (DBE, WBE etc.) and Certifying Agency below, and provide copy of SBE Certification.

SBE Type and Certifying Agency: _____

E. SERVICE PROVIDER/CONTRACTOR REGISTRATION PROGRAM

Proposer's Department of Industrial Relations (DIR) PWC Registration
Number _____ and expiration date _____,
20____.



ATTACHMENT B
EXCEPTIONS TO AGREEMENT

Exceptions to the Agreement. If Proposer takes exception to the Sample Agreement, the Proposer must state the reason for the exception and state the specific proposed Agreement language to include in place of the provision. At the discretion of the District, exceptions not called out here will not be negotiable after the due date for submission of proposals.

☐ I acknowledge that any exceptions to the Agreement, listed below, are not preferences but are absolutely necessary for acceptance of an Agreement with the District.

1. Exceptions: Identify below if Proposer takes exception to the Sample Agreement (CHECK ONE):

EXCEPTIONS <input type="checkbox"/>	NO EXCEPTIONS <input type="checkbox"/>
-------------------------------------	--

2. List of Exceptions: If Proposer has exceptions to the Sample Agreement, as acknowledged above, please provide in the preferred format below.

Agreement Provision to which exception is taken	Reason for Exception	Proposed Agreement Language

Name of Proposer (Company): _____

Signature

Date



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ATTACHMENT C
FEE SCHEDULE

FIXED FEE

Term 1 (07/01/25 - 06/30/26)

Item No.	Item	Estimated Quantities	Price
1	Scheduled Maintenance Services (To include supervision, equipment, materials, and incidental costs)	EA	\$ _____
2	Roof Assessment	EA	\$ _____
3	Hourly Rate (Labor)	HR	\$ _____
4	Asbestos Abatement	HR	\$ _____

Term 2 (07/01/26 - 06/30/27)

Item No.	Item	Estimated Quantities	Price
1	Scheduled Maintenance Services (To include supervision, equipment, materials, and incidental costs)	EA	\$ _____
2	Roof Assessment	EA	\$ _____
3	Hourly Rate (Labor)	HR	\$ _____
4	Asbestos Abatement	HR	\$ _____

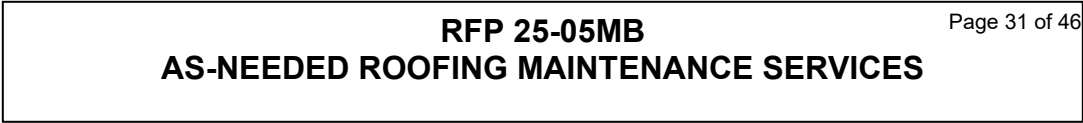


Term 3 (07/01/27 - 06/30/28)

Item No.	Item	Estimated Quantities	Price
1	Scheduled Maintenance Services (To include supervision, equipment, materials, and incidental costs)	EA	\$ _____
2	Roof Assessment	EA	\$ _____
3	Hourly Rate (Labor)	HR	\$ _____
4	Asbestos Abatement	HR	\$ _____

Term 4 (07/01/28 - 06/30/29)

Item No.	Item	Estimated Quantities	Price
1	Scheduled Maintenance Services (To include supervision, equipment, materials, and incidental costs)	EA	\$ _____
2	Roof Assessment	EA	\$ _____
3	Hourly Rate (Labor)	HR	\$ _____
4	Asbestos Abatement	HR	\$ _____

**Term 5 (07/01/29 - 06/30/30)**

Item No.	Item	Estimated Quantities	Price
1	Scheduled Maintenance Services (To include supervision, equipment, materials, and incidental costs)	EA	\$ _____
2	Roof Assessment	EA	\$ _____
3	Hourly Rate (Labor)	HR	\$ _____
4	Asbestos Abatement	HR	\$ _____

Additional Services (hourly Rate) For all terms	\$ _____
--	----------

*All rates shall be considered part of the fully burdened hourly rates stated in this Agreement: vehicle expenses, parking, tolls, film, postage, facsimiles, computer usage, printing, normal copying and document reproduction, blue print services, travel, telecommunications, photography, and all other costs and expenses incurred in completing such services.

**DO NOT MODIFY THE ABOVE FEE SCHEDULE;
DOING SO MAY DEEM YOUR PROPOSAL NON-RESPONSIVE.**

Name of Proposer (Company): _____

Signature

Date _____



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**ATTACHMENT D
PROPOSER'S SUB-SERVICE PROVIDERS**

Name, Address and DIR Registration Number (if applicable) of Sub-Service Provider	Type of Service	SBE Type (DBE, WBE etc.)	*Certifying Agency	**Percent of Service	Dollar Value of Services

* Must provide copy of SBE Certification.

**Must provide percentages of work to be subcontracted. If unknown, what is your overall percentage for all subs combined for the project?



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ATTACHMENT E
EQUAL OPPORTUNITY PROGRAM BONUS POINTS

ADA SCOPE ENHANCEMENT: The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has included ADA Enhancements that are **OVER AND ABOVE MINIMUM REQUIREMENTS AND WITHIN THE SCOPE OF SERVICES**, including taking into consideration Universal Design. The Proposer must submit written documentation to support their ADA Enhancements for the District's review and consideration.

Is your firm proposing ADA enhancements within the scope of services for the added bonus points? Yes ___ No ___

May include, but not be limited to the following **examples** listed below:

Incorporation of Universal Design
 Review by recognized ADA committee or organization
 ADA outreach
 Wider sidewalks as applicable
 More disabled parking as applicable
 Features such enhanced Crosswalks (latest technology)

PROPOSER'S ADA PROGRAM AS PER THIS SCOPE OF SERVICE: _____



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STAFFING: The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has staff with disabilities as defined by the ADA, or that has included one or more Disabled Veteran Business Enterprise (DVBE) subcontracting firm(s). The Proposer **MUST** submit DVBE certification documentation and workforce statistical data reporting number and percentage of total employees with disabilities as defined by the ADA.

Acceptable Agency DVBE Certification documentation: Central Contractor Registration (CCR) or State of California Department of General Services (DGS)

Is your firm claiming DVBE or Staffing bonus points? Yes___ No___

Please complete workforce statistical data:

Job Group	Disabled Staff	
	<u>#</u>	<u>%</u>
Officials/Managers		
Professionals		
Technicians		
Sales Workers		
Admin Support		
Craft Workers		
Operators		
Laborers		
Service Workers		
Total:		



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VETERAN'S STATUS: The District shall award five (5) points to a firm's total score from the evaluation criteria/matrix that has Veteran's status or has staff with Veteran's status. **Documentation of a firm's Veteran's status is acknowledged through the firm's good faith by completing the statistical data report listed below.**

Is your firm claiming Veteran's Status bonus points? Yes___ No___

Please complete workforce statistical data:

Job Group	VETERANS STATUS	
	#	%
Officials/Managers		
Professionals		
Technicians		
Sales Workers		
Admin Support		
Craft Workers		
Operators		
Laborers		
Service Workers		
Total:		



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ATTACHMENT F
STATEMENT REGARDING DIVERSITY, EQUITY, AND INCLUSION

Proposers represent that they are an equal opportunity employer, and it shall not discriminate against any subconsultant, employee or applicant for employment because of race, religion, color, national origin, handicap, ancestry, sex, gender, gender expression, sexual orientation, or age. Such non-discrimination shall include, but not be limited to, all activities related to initial employment, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff or termination.

Provide here a written statement of Proposer's commitment to diversity, equity, and inclusion, which shall include a commitment and brief description of its plan to implement good faith efforts to recruit subconsultants and employees in a non-discriminatory manner.

ATTACH ADDITIONAL SHEETS IF NECESSARY



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ATTACHMENT G



Employment and Ownership Report

Submitted to:

**Diversity, Equity, and Inclusion
Port of San Diego**

Submitted by:

Name of Business	
Contact Person	
Address	
City, State, Zip Code	
Phone Number	
E-Mail Address	
Date	
Signature	

The submittal of this information and subsequent DEI updates and/or reports required by Agreement language is for recordkeeping and tracking purposes only and will not be used as a basis for decisions, unless Service Provider fails to provide such information.



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A. Employment Report

	Number of Employees – Report Employees in only one category						
Job Categories	Race/Ethnicity						
	Women						
	White	Black or African American	Hispanic	Native Hawaiian or Other Pacific Islander	Asian	American Indian or Alaska Native	Two or More Races
	A	B	C	D	E	F	G
Executives							
Mid-Level Executives							
Professionals							
Technicians							
Sales Workers							
Admin Support							
Craft Workers							
Operatives							
Laborers							
Service Workers							
Total							



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	Number of Employees – Report Employees in only one category						
Job Categories	Race/Ethnicity						
	Men						
	White	Black or African American	Hispanic	Native Hawaiian or Other Pacific Islander	Asian	American Indian or Alaska Native	Two or More Races
	H	I	J	K	L	M	N
Executives							
Mid-Level Executives							
Professionals							
Technicians							
Sales Workers							
Admin Support							
Craft Workers							
Operatives							
Laborers							
Service Workers							
Total							



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	Number of Employees – Report Employees in only one category							
Job Categories	Race/Ethnicity							
	Nonbinary							
	White	Black or African American	Hispanic	Native Hawaiian or Other Pacific Islander	Asian	American Indian or Alaska Native	Two or More Races	Total Col A-U
	O	P	Q	R	S	T	U	V
Executives								
Mid-Level Executives								
Professionals								
Technicians								
Sales Workers								
Admin Support								
Craft Workers								
Operatives								
Laborers								
Service Workers								
Total								



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B. Explanation for Completing Employment Data

Employment data must include ALL current full-time and part-time employees. Employees must be counted by sex and race/ethnic category for each of the occupational categories. You may acquire the race/ethnic information necessary for this report either by voluntary self-identification surveys of the workforce, or from post-employment records, or visual surveys of the workforce. Eliciting information on the race/ethnic identity of an employee by direct inquiry is not allowed.

For the purpose of this report, an employee may be included in the group to which they appear to belong, identifies with, or is regarded in the community as belonging. However, no person should be counted in more than one race/ethnic group. The race/ethnic categories for this survey are:

- Hispanic or Latino – A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race.
- White – A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.
- Black or African American – A person having origins in any of the Black racial groups of Africa.
- Native Hawaiian or Other Pacific Islander – A person having origins in any of the peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- Asian – A person having origins in any of the original peoples of the Far East, Southeast Asian, or the Indian Subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.
- American Indian or Alaska Native – A person having origins in any of the original peoples of North and South America (including Central America), and who maintain tribal affiliation or community attachment.
- Two or More Races – All persons who identify with more than one of the above five races.

To assist you in determining where to place your jobs within the occupational categories, a description of job categories is as follows:

- ***Executives (Officials and Managers):*** Individuals, who plan, direct and formulate policies, set strategy and provide the overall direction of enterprises/organizations for the development and delivery of products or services, within the parameters approved by boards of directors or other governing bodies. Residing in the highest levels of organizations, these executives plan, direct or coordinate activities with the support of subordinate executives and staff managers. They include, in larger organizations, those individuals within two reporting levels of the CEO, whose responsibilities require frequent interaction with the CEO. Examples of these kinds of managers are chief executive officers, chief operating officers, chief financial officers, line of business heads, presidents or executive vice presidents of functional areas or operating groups, chief



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information officers, chief human resources officers, chief marketing officers, chief legal officers, management directors and managing partners.

- **Mid-Level Executives:** Individuals who serve as managers, other than those who serve as Executive/Senior Level Officials and Managers, including those who oversee and direct the delivery of products, services, or functions at group, regional or divisional levels of organizations. These managers receive directions from the Executive/Senior Level management and typically lead major business units. They implement policies, programs, and directives of executive/senior management through subordinate managers and within the parameters set by Executive/Senior Level management. Examples of these kinds of managers are vice presidents and directors, group, regional or divisional controllers; treasurers; human resources, information systems, marketing, and operations managers. The First/Mid-Level Officials and Managers subcategory also includes those who report directly to middle managers. These individuals serve at functional, line of business segment or branch levels and are responsible for directing and executing the day-to-day operational objectives of enterprises/organizations, conveying the directions of higher-level officials and managers to subordinate personnel and, in some instances, directly supervising the activities of exempt and non-exempt personnel. Examples of these kinds of managers are: first-line managers; team managers; unit managers; operations and production managers; branch managers; administrative services managers; purchasing and transportation managers; storage and distribution managers; call center or customer service managers; technical support managers; and brand or product managers.
- **Professionals:** Most jobs in this category require bachelor and graduate degrees, and/or professional certification. In some instances, comparable experience may establish a person's qualifications. Examples of these kinds of positions include accountants and auditors; airplane pilots and flight engineers; architects; artists; chemists; computer programmers; designers; dietitians; editors; engineers; lawyers; librarians; mathematical scientists; natural scientists; registered nurses; physical scientists; physicians and surgeons; social scientists; teachers; and surveyors.
- **Technicians:** Jobs in this category include activities that require applied scientific skills, usually obtained by post-secondary education of varying lengths, depending on the particular occupation, recognizing that in some instances additional training, certification, or comparable experience is required. Examples of these types of positions include drafters; emergency medical technicians; chemical technicians; and broadcast and sound engineering technicians.
- **Sales Workers:** These jobs include non-managerial activities that wholly and primarily involve direct sales. Examples of these types of positions include advertising sales agents; insurance sales agents; real estate brokers and sales agents; wholesale sales representatives; securities, commodities, and financial services sales agents; telemarketers; demonstrators; retail salespersons; counter and rental clerks; and cashiers.
- **Administrative Support Workers:** These jobs involve non-managerial tasks providing administrative and support assistance, primarily in office settings. Examples of these types of positions include office and administrative support workers; bookkeeping; accounting and auditing clerks; cargo and freight agents; dispatchers; couriers; data entry keyers; computer



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operators; shipping, receiving and traffic clerks; word processing and typists; proofreaders; desktop publishers; and general office clerks.

- **Craft Workers:** Most jobs in this category include higher skilled occupations in construction (building trade craft workers and their formal apprentices) and natural resource extraction workers. Examples of these types of positions include boilermakers; brick and stone masons; carpenters; electricians; painters (both construction and maintenance); glaziers; pipe layers; plumbers, pipe fitters and steamfitters; plasterers; roofers; elevator installers; earth drillers; derrick operators; oil and gas rotary drill operators; and blasters and explosive workers. This category also includes occupations related to the installation, maintenance and part replacement of equipment, machines, and tools, such as: automotive mechanics; aircraft mechanics; and electric and electronic equipment repairers. This category also includes some production occupations that are distinguished by the high degree of skill and precision to perform them, based on clearly defined task specifications, such as millwrights, etchers, and engravers; tool and die makers; and pattern makers.
- **Operatives:** Most jobs in this category include intermediate skilled occupations and include workers who operate machines or factory-related processing equipment. Most of these occupations do not usually require more than several months of training. Examples include textile machine workers; laundry and dry-cleaning workers; photographic process workers; weaving machine operators; electrical and electronic equipment assemblers; semiconductor processors; testers, graders, and sorters; bakers; and butchers and other meat, poultry, and fish processing workers. This category also includes occupations of generally intermediate skill levels that are concerned with operating and controlling equipment to facilitate the movement of people or materials, such as: bridge and lock tenders; truck, bus, or taxi drivers; industrial truck and tractor (forklift) operators; parking lot attendants; sailors; conveyor operators; and hand packers and packagers.
- **Laborers:** Jobs in this category include workers with more limited skills who require only brief training to perform tasks that require little or no independent judgment. Examples include production and construction worker helpers; vehicle and equipment cleaners; laborers; freight, stock, and material movers; service station attendants; construction laborers; refuse and recyclable materials collectors; septic tank services; and sewer pipe cleaners.
- **Service Workers:** Jobs in this category include food service, cleaning service, personal service, and protective service activities. Skill may be acquired through formal training, job-related training, or direct experience. Examples of food service positions include cooks; bartenders; and other food service workers. Examples of personal service positions include medical assistants and other healthcare support positions; hairdressers; ushers; and transportation attendants. Examples of cleaning service positions include cleaners; janitors; and porters. Examples of protective service positions include transit and railroad police and fire fighters; guards; private detectives and investigators.



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C. Statement of Ownership

Is your firm currently certified as any of the following (check all that apply) and if so, please identify the certifying agency:

- | | |
|---|---|
| <input type="checkbox"/> Small Business Enterprise (SBE) certified by: | <input type="checkbox"/> Veteran owned business (VBE) certified by: |
| <input type="checkbox"/> Woman owned business (WBE) certified by: | <input type="checkbox"/> LGBTQIA+ owned business certified by: |
| <input type="checkbox"/> Minority owned business (MBE) certified by: | <input type="checkbox"/> HUBZone |
| <input type="checkbox"/> Disabled Veteran owned business (DVBE),
certified by: | <input type="checkbox"/> Other: |

Please check here ☐ if you believe you are eligible for any of the above certifications, and for WBE or MBE please voluntarily self-identify as follows and DEI staff will contact you with certification information:

Gender:	Ethnicity:	
<input type="checkbox"/> Woman	<input type="checkbox"/> Hispanic or Latino	<input type="checkbox"/> Native Hawaiian/Pacific Islander
<input type="checkbox"/> Male	<input type="checkbox"/> White	<input type="checkbox"/> American Indian/Alaska Native
<input type="checkbox"/> Nonbinary	<input type="checkbox"/> Black or African American	<input type="checkbox"/> Two or More Races

Type of Legal Business Structure: (check all that apply)

<input type="checkbox"/> Sole Proprietorship	<input type="checkbox"/> Corporation
<input type="checkbox"/> Limited Liability Partnership	<input type="checkbox"/> Limited Liability Company
<input type="checkbox"/> Partnership	<input type="checkbox"/> Privately Held
<input type="checkbox"/> Publicly Traded	<input type="checkbox"/> Other, please describe:

Identify the majority owner(s) of the firm:

Name/Title:	Address:	Email:	Phone:	% Owned:	Years Owned:



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ATTACHMENT H
PROPOSAL RESPONSE FORM
San Diego Unified Port District

APPROACH TO THE PROJECT

1. Describe your company's approach to roofing maintenance and repair for commercial and industrial buildings, including the methodologies and best practices used.
2. What key components do your inspection reports include, and how do you document and communicate findings to clients?
3. How do you determine whether a roof requires minor repairs, extensive maintenance, or full replacement?
4. What safety procedures and fall protection measures do you implement during roofing inspections and maintenance?
5. How does your company ensure compliance with industry standards, manufacturer warranties, and regulatory requirements for roofing maintenance?

CAPABILITY TO PERFORM

1. What roofing systems and materials does your company have expertise in maintaining? (e.g., built-up roofing (BUR), single-ply membranes, metal roofs, modified bitumen, green roofs, cool roofs).
2. Explain your company's quality control measures to ensure maintenance and repairs meet performance and durability standards.
3. How does your company handle weather-related scheduling challenges to ensure timely completion of roofing maintenance tasks?
4. Do you provide 24/7 emergency response services for urgent roof repairs? If so, describe your response time and procedures.
5. What is your process for ensuring that all roofing work is completed in compliance with OSHA, EPA, and California building codes?



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RELEVANT EXPERIENCE

1. Describe your experience working with high-exposure environments, such as coastal, maritime, or high-wind areas.
2. Provide examples of past projects where your company successfully extended the lifespan of a roofing system through proactive maintenance.
3. Describe any special techniques or innovative solutions your company has implemented to improve roof durability and energy efficiency.

COST AND PRICE

1. Proposer shall complete, sign, date & submit Attachment C - Fee Schedule. No additional information is required.