

REQUEST FOR QUALIFICATIONS

FOR

DESIGN-BUILD SERVICES



**New K-8 School
Halifax County Schools**

September 13, 2022

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**REQUEST FOR QUALIFICATIONS FOR DESIGN-BUILD SERVICES
PUBLIC NOTICE**

September 13, 2022

The Halifax County Schools Board of Education (“District”) requests Statements of Qualifications/ Proposals for Design-Build Services for a new K-8 School project (“Project”).

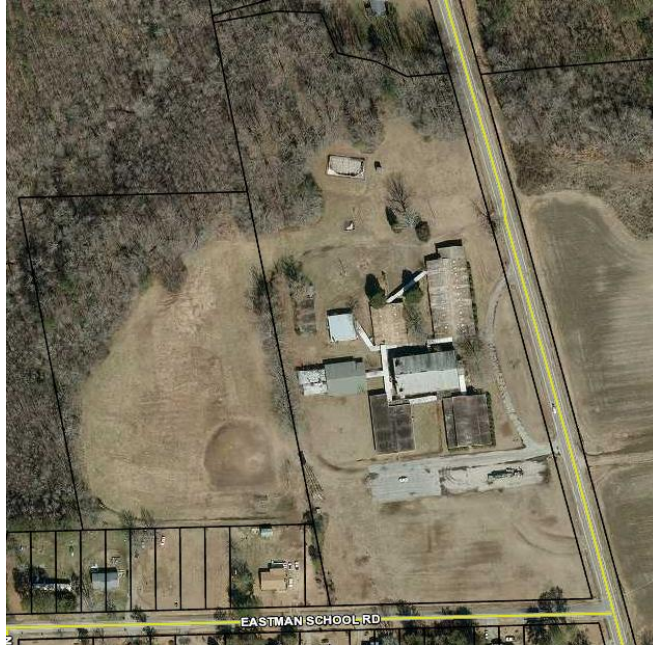
This request for qualifications (RFQ) package in electronic (PDF) format shall be requested from Terry Alston, Chief Financial Officer by email at alstonte@halifax.k12.nc.us. The District is not responsible for full or partial sets of RFQ documents, including addendum, obtained from any other source.

Proposers shall submit an electronic copy of the SOQ in PDF format to Terry Alston, Chief Financial Officer by email at alstonte@halifax.k12.nc.us no later than 4:00 p.m. Eastern Standard Time (EST) on September 27, 2022. Submittals received after the due date and time will not be considered. The Proposer’s name and the project name should be clearly displayed in the email subject line and attachment title. It is the sole responsibility of the Proposer to ensure receipt of its Statement of Qualifications to the District. Confirmation of receipt by telephone can be made directly to Terry Alston at 252-583-5111.

Pursuant to North Carolina General Statute 143-64.31, the District utilizes a “qualifications-based” selection process without consideration of fee during the initial phase in hiring DB firms. The District’s primary purpose in using the DB process is to utilize fast-tracked design and construction services to deliver quality construction in an economical and efficient manner. The District reserves the right to reject all offers or award a contract which, in its judgment, is in the best interest of Halifax County Schools. The District reserves the right to waive any informality. Small Business Entities, Women Owned Businesses and Minority Owned Businesses are encouraged to submit qualifications.

Project Site

The site for the new K-8 school is located at the existing Eastman School site on Hwy 48.



Scope of Work

Halifax County Schools Board of Education is soliciting qualifications from design-build teams to design and construct a new 540 student (600 student core) K-8 school. The new school will be built on the existing Eastman School site. The estimated program is 101,000 sq ft. The school will comply with general program guidelines set forth by the North Carolina Department of Public Instruction (NC DPI).

Anticipated Project Budget

The anticipated project budget is approximately \$41 million. Funds provided by the Needs-Based Public-School Capital Fund (NBPSCF) and County matching funds.

Anticipated Project Schedule

Activity:

Request for Qualifications advertisement
Deadline for submittal of questions
Statement of Qualifications due
Notice to Proceed
Completion of Construction

Dates:

09/13/2022
09/27/2022, 4:00 p.m. ET
09/27/2022, 4:00 p.m. ET
October 2022
May 2025

The District reserves the right to adjust the schedule and add or remove specific activities to meet the unique needs of this Project.

Selection Criteria and Weighting of Qualifications

Statements of Qualifications will be evaluated based on Proposers responses to the requirements of this RFQ. Evaluations will focus on relative strengths, weaknesses, and deficiencies associated with the SOQ.

Following evaluation of the qualifications of the design-builders, the three most highly qualified design-builders shall be ranked. If after the solicitation for design-builders not as many as three responses have been received from qualified design-builders, the District shall again solicit for design-builders. If as a result of such second solicitation not as many as three responses are received, the District may then begin negotiations with the highest-ranked design-builder under G.S. 143-64.31 even though fewer than three responses were received. If the District deems appropriate, it may invite some or all responders to interviews. Interviews are not anticipated at this time but may be requested if deemed necessary.

Each Proposer will be evaluated based on their SOQ score (100 points maximum) as determined through a qualification review process scoring criteria noted below:

- Section 1: DB Team (15 Total Points – detailed breakdown of points shown below)
 - 1.1 DB Team Selection (5 Points)
 - 1.2 Profile of Each Key Firm on DB Team (5 Points)
 - 1.3 Profile of Key Personnel (5 Points)

- Section 2: Experience (50 Total Points – detailed breakdown of points shown below)
 - 2.1 Design-Build Experience (10 Points)
 - 2.2 Experience with Halifax County Schools (10 Points)
 - 2.3 School Design Experience (15 Points)
 - 2.4 Participation Plan for Local Halifax County and MWBE Businesses (15 Points)

- Section 3: Project Approach (35 Total Points)

All proposers will be notified of the selection results. Final recommendation of any selected proposer is subject to the approval of the Board of Education. The District reserves the sole right to select the most qualified proposer(s) deemed to be in the best interest of the District.

Project Team Selection

Each design-builder shall submit in its response to this Request for Qualifications an explanation of its project team selection, which shall consist of either of the following:

A list of the licensed contractors, licensed subcontractors, and licensed design professionals whom the design-builder proposes to use for the project's design and construction. The design-builder may self-perform some or all of the work with employees of the design-builder and, without bidding, also enter into negotiated subcontracts to perform some or all of the work with subcontractors, including, but not exclusively with, those identified in the list. In submitting its list, the design-builder may, but is not required to, include one or more unlicensed subcontractors the design-builder proposes to use. The design-builder may, at its election and with or without the use of negotiated subcontracts, accept bids for the selection of one or more of its first-tier subcontractors.

Historically Underutilized Businesses (HUB) Participation

Halifax County Schools Board of Education follows the guidelines required for recruitment and selection of Historically Underutilized Businesses. The District does not discriminate on the basis of race, color, national origin, sex, religion, age, disability, sexual orientation, or genetic information in employment or the provision of or contracting for goods or services. The District is an equal opportunity employer and encourages Minority and Women Business Enterprises (M/WBEs) to participate in District contracting and sub-contracting opportunities through the North Carolina Historically Underutilized Business (HUB) Certification Program.

In accordance with N.C. Gen. Stat. § 143-128.2, the District, as awarding authority for public building construction and building repair projects, and the contractors and subcontractors performing the awarded contracts, shall cooperate and in good faith do all things legal, proper, and reasonable to achieve the District's minority business participation goal of ten percent (10%) in each building construction project.

The selected Proposer is required to:

- a. Make good faith efforts to reach this goal, including the ten specific actions listed in N.C. Gen. Stat. § 143-128.2(f).
- b. Maintain and provide the District with documentation of any contacts, correspondence, or conversation with minority businesses made to meet the 10% participation goal: and
- c. Execute the appropriate HUB participation forms.

Additional information regarding Historically Underutilized Businesses is available on the N.C. HUB website: <https://ncadmin.nc.gov/businesses/hub>.

INSTRUCTIONS TO PROPOSERS

Statement of Qualification Submission

Proposers shall submit one (1) electronic copy of the complete SOQ package in PDF format by email to Terry Alston at alstonte@halifax.k12.nc.us no later than 4:00 p.m. Eastern Standard Time (EST) on Tuesday, September 27, 2022. Submittals received after the due date and time will not be considered. The Proposer's name and the project name should be clearly displayed in the email subject line and attachment title.

It is the sole responsibility of the Proposer to ensure receipt of its Statement of Qualifications to the District. Submittals received after the due date and time will not be considered. Confirmation of receipt by telephone can be made directly to Terry Alston at 252-583-5111.

Statement of Qualifications (SOQ) Format

SOQs are limited to a maximum of 20 double-sided sheets of 8-1/2" by 11" paper (40 numbered pages), excluding additional requirements. Pages with organizational charts, matrices, or diagrams may be formatted on larger sheets. Type size should be no smaller than 11 points for narrative sections, but may be reduced for captions, footnotes, etc. while maintaining legibility. Non-conforming submissions may be removed from consideration.

Addenda and Question & Answers

In order to clarify or modify any part of this RFQ, addenda may be issued and distributed by email to all Proposers. Proposers must submit questions or requests for clarification or information **by email** to alstonte@halifax.k12.nc.us no later than 4:00 p.m. ET on September 23, 2022. Questions and answers are presented solely for informational purposes and do not change any elements or aspects of the RFQ document.

Modification or Withdrawal of SOQs

A Proposer may change or withdraw its SOQ at any time prior to the due date by providing written notice by electronic mail to the Chief Financial Officer. The intent of the notification must be clear and concise.

Withdrawal of a SOQ will not preclude a Proposer from subsequently submitting a new SOQ, if that new SOQ is properly submitted and received by the SOQ due date.

Failure to Comply with Instructions

The District may choose to exercise the following options for SOQ packages that fail to comply with any requirement of this RFQ:

- a) assign a low rating; or
- b) deem the SOQ nonresponsive and remove the SOQ from further consideration.

Communications

All communication of any nature with respect to this RFQ shall be addressed to the Chief Financial Officer by email. Proposers are prohibited from communicating with employees, officers, or agents of Halifax

County and Halifax County Schools regarding this RFQ or SOQ from the time the RFQ is released until the selection results are publicly announced. These restrictions include “thank you” letters, phone calls, emails, and any contact that results in the direct or indirect discussion of this RFQ and/or the SOQ submitted by the Proposer. Violation of this provision may lead to the removal of the Proposer’s SOQ from consideration.

Negotiations and Modification of Contract Documents

The District may, at its option, conduct negotiations with the Proposer regarding any remaining issues pertaining to details of contract performance, methods of construction, timing, the maximum not-to-exceed pre-construction costs, and other matters that may affect cost or quality, provided that the general work scope remains the same and that the field of competition does not change as a result of material changes to the requirements stated in the RFQ. The District will make such modifications to the Contract Documents as it may determine, in the exercise of its sole discretion, to be necessary to fully incorporate the terms of the Proposer’s Statement of Qualification, to correct any inconsistencies, ambiguities, or errors that may exist in the Contract Documents, and to clarify contract terms, including technical requirements and specifications, if any. If, in the District’s sole discretion, it determines that the highest ranked Proposer is not responsive to the negotiation process, or that the parties will be unable to reach a mutually- acceptable contract, the District may terminate negotiations with the Proposer. The District will then continue the process of negotiation with the next highest-ranked Proposer until the District either successfully negotiates a Contract or cancels the procurement.

Upon the District’s completion of successful negotiations with the Proposer, the District will issue Notice of Intent to Award.

If the apparent highest ranked Proposer is not able to execute the DB Contract within ten (10) calendar days of receipt of the contract, or such later date as the District may authorize, District may enter into negotiations with the next highest-ranking Proposer.

If all Statements of Qualifications are rejected, all Proposers will be promptly notified.

Submitting Confidential Information

Each proposal becomes the property of the District and is considered a public record except for material that qualifies as “Trade Secret” information under North Carolina General Statute 66-152 et seq. To properly designate material as a trade secret under these circumstances, each firm must take the following precautions: (a) any trade secrets submitted by the firm should be submitted in a separate, sealed envelope marked “Trade Secret – Confidential and Proprietary Information – Do Not Disclose Except for the Purpose of Evaluating this Proposal,” and (b) the same trade secret/confidentiality designation should be stamped on each page of the trade secret materials contained in the envelope. Any firm that designates its entire proposal as a trade secret may be disqualified from consideration.

PROJECT SCOPE

Background

The new Halifax K-8 School will be located on Hwy 48 in Enfield, North Carolina. The site is approximately 13 acres surrounded by residential neighborhoods and woods. The existing Eastman school buildings are still located on the site, but unoccupied.

Project Scope

Due to aging facilities, long bus rides for students in the western part of the County, there is a need for a new school located on the former Eastman site. The school will pull students from Hollister and Pittman Elementary Schools as well as students from Davie Middle School.

A Master Plan was completed for this site in 2019 following multiple workshops conducted with District staff, School Board members, and community members. After receiving funding from the 2021 NC DPI Needs Based Public School Construction Fund, the Board of Education is moving forward with the plans for this consolidated school.

SOQ EVALUATION CRITERIA, SCORING, AND SELECTION

These instructions outline the guidelines governing the SOQ and the approach to be used in its development and presentation. The intent of the RFQ is to encourage responses that clearly communicate the Proposer's understanding of the District's requirements. Only that information which is essential to an understanding and evaluation of the SOQ should be submitted. Items not specifically and explicitly related to the RFQ and Statement of Qualification, e.g. brochures, marketing material, etc. will not be considered in the evaluation.

Section 1 - DB Team (15 Total Points – detailed breakdown of points shown below)

1.1 DB Team Selection (5 Points)

Provide either:

- a. A list of licensed contractors, licensed subcontractors, and licensed design professionals the DB proposes to use on the project, or
- b. The DB's strategy for selecting the contractors and subcontracts based on the provisions of Article 8 of Chapter 143 of the General Statutes.

Provide a narrative explaining why the DB selected each firm for the DB Team.

1.2 Profile of Each Key Firm on DB Team (5 Points)

Provide a profile of each key firm on the team. For each firm, include:

- a. Legal Name of Firm; Date of Firm Formation
- b. Legal Business Description (Individual, Partnership, Corporation, Joint Venture, etc.)
- c. Principal Office Location: Location of office that will be conducting the work if different than Principal Office
- d. Name and contact information of Authorized Representative
- e. A statement of conflicts (if any) the proposing entity or key employees may have regarding these services. The statement should include conflicts, as well as any working relationships that may be perceived by disinterested parties as a conflict. If no potential conflicts of interests are identified, state "not applicable."
- f. A summary of any pending, ongoing, or prior litigation, claim(s), or contract disputes filed by or against the firm in the past ten (10) years which is related to the services that the firm provides in the regular course of business. If no litigation, claims, or contract disputes exist, state "not applicable."
- g. A statement on the availability and commitment of the firm, its principal(s) and assigned professionals to undertake the project. Include a description of the firm's current workload.

1.3 Profile of Key Team Members (5 Points)

Provide an organizational chart of key team members, including any sub-consultants, to be assigned specifically to this Project. Identify the Project Manager who will be empowered to make decisions for and act on behalf of the firm.

Provide a resume of each key personnel represented on the team (design-builder, contractor(s), designer(s), etc.). Identify licenses (with numbers) and qualifications.

Section 2 – Experience (50 Total Points – detailed breakdown of points shown below)

For Subsections 2.1 through 2.4 below, list projects successfully completed by the DB Team and/or its members within the last 15 years. At a minimum, each project provided must include the following:

- h. Project description – Include an explanation of why experience on the project will benefit the District on the proposed project. Describe similarities in the scope of the example provided and the proposed project.
- i. Identify Key Team Members and their role.
- j. Discuss the methods, approach and controls used on the project in order to complete it in an efficient timely, economical and professional manner.
- k. Describe specific examples of challenges faced on the project and how the issues were resolved.
- l. Client Reference Contact Information

Additional information is requested in each Subsection.

2.1 Design Build Experience (10 Points)

Identify projects where the DB and/or its team members have experience with Design-Build projects. Provide examples of past projects with a final GMP within the Owner’s original budget.

2.2 Experience with Halifax County Schools (10 Points)

Provide project experience that has occurred within Halifax County Schools, North Carolina. Where applicable, describe project experiences of similar scope of the proposed project.

2.3 School Design Experience (15 Points)

Provide experience with school design. Where applicable, provide experience with planning, programming, and design with regard to renovations and additions to structures.

2.4 Participation Plan for Local Halifax County and MWBE Businesses (15 Points)

Provide Participation Plan describing Respondent’s approach and past history with HUB/MWSBE inclusion for similar projects, as well as the proposed utilization of HUB/MWSBE’s proposed to perform a commercially useful function under the scope of this contract.

Section 3 - Project Approach (35 Total Points)

Proposer shall:

- a. Describe the DB Team’s methodology and approach to the project. The description shall illustrate the Proposer’s understanding of the project scope and requirements.
- b. Identify and describe major tasks and subtasks. Illustrate the ability to meet the District’s schedule.
- c. Describe available resources to successfully complete this project.
- d. Provide specific details regarding how the firm will maintain initial budgets to ensure that the final GMP is within the funds available.

Additional Requirement

Proposer shall submit with its SOQ a letter, dated within the last 30 days, from the Proposer’s surety company, signed by surety’s Attorney in Fact, verifying surety’s willingness to issue sufficient payment and performance bonds for this project, on behalf of Proposer or its agent licensed to do business in North Carolina, and verifying Proposer’s capability and capacity based on Proposer’s current value of work. Surety company shall be bond rated “A” or better under the A.M. Best Rating system or The Federal Treasury List. Surety Letter will not count in page limits.

Evaluation and Selection Process

SOQ will be evaluated based on the Proposer’s responses to the requirements of this RFQ. Evaluations will focus on relative strengths, weaknesses, and deficiencies associated with SOQ.

Interviews with the short-listed teams may be held at the option of the evaluation committee. The District reserves the right to obtain clarification or additional information with any proposer regarding its SOQ.

All proposers will be notified of the selection results. Final recommendation of any selected firm is subject to the approval of the Board of Education. The District reserves the sole right to select the most qualified firm(s) deemed to be in the best interest of the District.

GENERAL TERMS AND CONDITIONS

Duties and Obligations of Proposers in the RFQ Process

Interested proposers are expected to fully inform themselves as to all conditions, requirements, and specifications of this RFQ before submitting a SOQ. Proposers must perform their own evaluation and due diligence verification of all information and data provided by the District. The District makes no representations or warranties regarding any information or data provided by the District. Proposers are expected to promptly notify the District in writing to report any ambiguity, inconsistency, or error in this RFQ. Failure to notify will constitute a waiver of claim of ambiguity, inconsistency, or error.

No Collusion, Bribery or Conflict of Interest

By responding to this RFQ, the Proposer shall be deemed to have represented and warranted that its SOQ submittal is not made in connection with any competing firm submitting a separate response to this RFQ and is in all respects fair and without collusion or fraud. Furthermore, the Proposer certifies that neither it, any of its affiliates or subconsultants, nor any employees of any of the foregoing has bribed, or attempted to bribe, an officer or employee of the District, or other government official at the state or federal level, in connection with this RFQ.

Public Records

Upon receipt by the District, each SOQ becomes the property of the District and is considered a public record except for material that qualifies as "Trade Secret" information under N.C. Gen. Stat. § 66-152 et seq. SOQ will be reviewed by the District's evaluation committee, as well as other District staff and members of the general public who submit public record requests after a selection result has been announced to the public.

To properly designate material as a trade secret under these circumstances, each Proposer must take the following precautions: (a) any trade secrets submitted by the Proposer should be submitted in a separate, sealed envelope marked "Trade Secret – Confidential and Proprietary Information – Do Not Disclose Except for the Purpose of Evaluating this Qualification package," and (b) the same trade secret/confidentiality designation should be stamped on each page of the trade secret materials contained in the envelope.

In providing a SOQ, each Proposer agrees that the District may reveal any trade secret materials contained in such response to the evaluation committee. Furthermore, each proposer agrees to indemnify and hold harmless the District and each of its officers, employees and agents from all costs, damages and expenses incurred in connection with refusing to disclose any material that the Proposer has designated as a trade secret. Any proposer that designates its entire SOQ as a trade secret may be removed from consideration.

Cost of SOQ Preparation

The District accepts no liability for the costs and expenses incurred by Proposers responding to this RFQ, in preparing responses for clarification, in attending interviews, participating in contract development sessions, or in attending meetings and presentations required for the contract approval process. Each Proposer that enters into the procurement process shall prepare the required materials and submittals at its own expense and with the express understanding that the Proposer cannot make any claims whatsoever for reimbursement from the District for the costs and expenses associated with the procurement process. The RFQ does not commit the County to pay for any costs incurred prior to the execution of a final contract.

District's Reserved Rights and Options

The District expects to select one or more Proposers but reserves the right to request substitutions of any key team member, including staff and sub-consultants. The District reserves the right to contact any Proposer if such is deemed desirable by the District to obtain any additional information including but not limited to experience, qualifications, abilities, equipment, facilities, and financial standing. The District reserves the right to conduct investigations with respect to the qualifications and experience of any Proposer.

The District reserves the right to modify any part of this RFQ by issuing one or more addenda during the RFQ response period. The District reserves the right to reject any or all responses to the RFQ, to advertise for new RFQ responses, or to accept any RFQ response, in whole or part, deemed to be in the best interest of the District. The District reserves the right to waive technicalities and informalities.

This RFQ does not constitute an offer by the District. A response to this RFQ shall not be construed as a contract, nor indicate a commitment of any kind. No binding contract, obligation to negotiate, or any other obligation shall be created on the part of the District unless the District and the Proposer execute a contract. The District may select the Proposer to engage in further discussions. The commencement of such discussions, however, does not signify a commitment by the District to execute a contract or to continue discussions. The District can terminate discussions at any time and for any reason. No recommendations or conclusions from this RFQ process concerning the Proposer shall constitute a right (property or otherwise) under the Constitution of the United States or under the Constitution, case law, or statutory law of North Carolina.

North Carolina Licensing

In order to offer Construction Services (General Contracting, Electrical Contracting, Plumbing, Heating and Fire Sprinkler Contracting, or Landscape Contracting) and Design Services (Architecture, Engineering, or Landscape Architecture) as part of the response to this RFQ, the proposing firms must be properly licensed to provide Construction Services and Design Services in the State of North Carolina. More information on the North Carolina state boards may be found at the following websites:

CONSTRUCTION:

NC Licensing Board for General Contractors: (<https://nclbgc.org>)

NC State Board of Examiners of Electrical Contractors: (<https://www.ncbeec.org>)

NC State Board of Examiners of Plumbing, Heating and Fire Sprinkler Contractors: (<https://www.nclicensing.org>)

NC Landscape Contractors' Licensing Board: (<https://nclclb.com>)

DESIGN:

NC Board of Architecture: (<http://www.ncbarch.org>)

NC Board of Examiners for Engineers and Surveyors: (<http://www.ncbels.org>)

NC Board of Landscape Architects: (<http://www.ncbola.org>)

Minimum Insurance and Bonding Requirements

Successful proposers must have the financial capacity to undertake the work and assume associated liability. The successful proposer will be required to furnish proof of insurance coverage in the minimum amounts specified below:

- e. Professional liability insurance coverage in the minimum amount of \$1,000,000;

- f. Automobile liability in the minimum amount of \$1,000,000;
- g. Commercial general liability in the minimum amount of \$2,000,000; and
- h. Workers' compensation insurance as required by North Carolina statutes.

The successful proposer will also be required to provide performance and payment bonds in the amount of 100% of the value of the Project.

Registration with Secretary of State for North Carolina

Any proposer wishing to be considered for the project must be properly registered with the Office of the Secretary of State at the time of submission of the SOQ. The proposer(s) selected under this RFQ will be responsible for providing all professional, technical, managerial, and administrative staff with the appropriate skills and qualifications to complete the project.

Ownership of Work Products

The District shall have exclusive ownership of all intellectual property rights in all designs, plans and specifications, documents and other work product prepared by, for, or under the direction of the Proposer pursuant to any contract under this RFQ (collectively, the "Design Work"), including without limitation the right to copy, use, disclose, distribute, and make derivations of the Design Work for any purpose or to assign such rights to any third party. The Design Work shall be prepared in the District's name and shall be the sole and exclusive property of the District, whether or not the work contemplated therein is performed. The District will grant the Proposer a royalty- free, non-exclusive license to use and copy the Design Work to the extent necessary to perform the contract.

No Lobbying

The Proposer certifies that it has not and will not pay any person or organization to influence or attempt to influence an officer or employee of the District or the State of North Carolina in connection with obtaining a contract under this RFQ.

Compliance with Anti-Discrimination and Equal Opportunity Laws and Regulations

Proposers must comply with all applicable anti-discrimination and equal opportunity statutes, regulations, and Executive Orders. Halifax County Schools is an Equal Opportunity Employer.

E-Verify Compliance

Proposer certifies that it currently complies with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes, and that if selected as the successful proposer, it will continue to comply with these requirements. Proposer also certifies that it will require that its subcontractors that perform any work pursuant to this contract comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes.