

Re: Request for Proposals No. P2211, Program Management Services for the CCSD Phase V 2023-2028 Capital Maintenance Program

Dear Perspective Offeror:

The Charleston County School District (CCSD) is soliciting sealed proposals for Program Management Services for its Phase V 2023-2028 Capital Maintenance Program. Enclosed is the Request for Proposal (RFP) for program management services.

Operations Division

**Gerrita Postlewait, Ed.D.**  
Superintendent of Schools

**Jeffrey Borowy, P.E.**  
Chief Operating Officer

Questions will be accepted until September 23, 2021 @ 3:00 p.m. EST. Forward questions to Raymond Jenkins at email [Raymond\\_jenkins@charleston.k12.sc.us](mailto:Raymond_jenkins@charleston.k12.sc.us). Proposals will be accepted until 3:00 p.m. EST on October 7, 2021 at CCSD Operation Center located at 3999 Bridge View Drive, North Charleston, 29405. Each proposal must be physically in the possession of the Facilities Procurement Supervisor, Mr. Raymond Jenkins at that time for a proposal to be considered timely.

Proposals received after that time will not be considered or evaluated. The offeror shall submit one (1) original and flash drive, with six (6) copies of their proposal and one copy of your firm's Quality Assurance Program. All proposals shall be bound in three (3) ring binders with dividers. All pages should be sequentially numbered and the proposal may not exceed 200 pages. The Construction Procurement Officer shall check all proposals for conformance and any excess pages shall be deleted before the proposal is sent forward to the Selection Board for review.

Electronically transmitted and FAX copies of the proposal will not be accepted.

A district supervisor shall publicly open all proposals submitted and properly received by 3:00 p.m. EST on October 7, 2021. Only the name of the offeror shall be read aloud at the opening. Contents of competing offerors shall not be disclosed at any time during the selection process.

A signature of a person authorized to contract for the company is required. The signature must be in blue ink. Please insert the exact company name and the signature of the responsible person to contact your proposal.

Please allow adequate time to ensure delivery if your proposal is forwarded by U.S. Mail or other delivery services. Proposals received after the time shown will not be considered. Mark your envelope with your company name and Request for Proposal No. P2211 Program Management Services for the CCSD Phase V 2023-2028 Capital Maintenance Program.

The Charleston County School District reserves the right to reject any and all proposals or any portion of said proposals, to waive minor technicalities, and to make any and all selections in the best interests of the School District.

Raymond Jenkins  
Facilities Procurement Supervisor

CHARLESTON COUNTY SCHOOL DISTRICT  
Request for Proposal (RFP)  
Solicitation No. P2211

1. Project Objective: RFP Program Management Services for the Phase V 2023-2028 Capital Maintenance and Building Program.

The scope of work awarded under this Request for Proposal (RFP) will consist of complete program management, project management, construction management and logistics management services of the assigned projects during the full term of the Board Approved Capital Maintenance program. Upon the evaluation of the initial proposals, a minimum of three (3) and up to five (5) of the most technically qualified Offerors, on the basis of information available before the interviews, will be interviewed on the same day with at least ten (10) days advance notice. The top one (1) offeror distinguishing themselves as being the most technically qualified firms based on the technical evaluation criteria identified herein will have the opportunity to negotiate a program management contract based on a fixed percentage of the program budget minus the program management fee. If negotiations of a fair and reasonable price cannot be achieved with the highest ranked offeror, then negotiations will proceed with the next highest ranked Offeror and so on, until a fair and reasonable price is negotiated. If an agreement is not reached with one (1) of these, additional firms, in order of their competence and qualifications must be selected after consultation with the District Selection Board and negotiations will be continued in the same manner until an agreement is reached.

2. General Scope of Work: The Board of Trustees has approved the Phase V 2023-2028 Capital Building Program and 2023-2028 Capital Maintenance Program. The intent of this RFP is to select a firm to manage the projects approved as part of the Phase V 2023-2028 Capital Maintenance Program. The selected firm will manage \$259 million of capital maintenance projects over the six (6) years, as well as, IT infrastructure and security projects.
3. Specialized Project Requirements: Prior successful management of a large K-12 building program. The key personnel must have prior South Carolina K-12 experience. The firms must have comprehensive program management skills that include the project management of: a school's education program; scoping, design, solicitation, and construction of new and renovated schools and special District facilities; program execution; construction management; logistics management; financial management, quality assurance and customer/public relations.
4. Hold Harmless Clause: Offeror is hereby notified that the District will not be responsible for any proposal expenses associated with responding to this solicitation even in the event the solicitation is cancelled or the program scope is significantly altered during the solicitation process. Offeror shall also indemnify and save harmless the Owner from and against any and all loss, cost, damages, expenses, and liability caused by accident or other

occurrence resulting from performance of any program management services hereunder to the Owner, Charleston County School District or third parties. Offeror shall furnish necessary certificates of insurance to the Owner in accordance with the contract prior to mobilization on site. Offeror must provide that Owner will be thirty days written notice of any intent to terminate such insurance by either the Offeror or the insuring company, during the term of the contract between the parties.

Offerors are cautioned against committing any violation that could result in suspension or debarment from doing business with the District pursuant to the Charleston County School District Procurement Code and Regulations. Examples of violations include, but are not limited to:

- Adding items to the contract without approval
- Increasing contract price without approval
- Making changes to contract without approval
- Misrepresentation of the contract to any using agency within the District

5. Planned Project Milestones:

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|--|-------------------|
| • PM Services Solicitation Issued                        | September 7, 2021 |
| • Questions Deadline                                     | September 23,2021 |
| • Proposals Due to Construction Procurement Officer      | October 2021      |
| • Tech Evaluations Completed by SB                       | October 2021      |
| • SA Approve to Short List                               | October 2021      |
| • Construct Procurement Office Notify Short Listed Firms | October 2021      |
| • Board Notification (Information) of Short Listed Firms | October 2021      |
| • Interviews Conducted by SB                             | November 2021     |
| • Negotiations with Highest Ranked Firm                  | November 2021     |
| • Negotiations Commence                                  | November 2021     |
| • Board of Trustee Update/Notification                   | December 2021     |
| • Intent to Award Letter Issued                          | December 2021     |
| • Award  | December 2021     |
| • Mobilization/Notice to Proceed                         | January 2022      |

6. Company Obligations:

All Offerors must meet or exceed the following minimum requirements:

1. The Offeror must hold a current South Carolina Construction Manager's License and a Charleston County Business License.
2. Contractor will not be permitted to assign all or a portion of the work outlined herein without the specific, written approval of the Construction Procurement Officer.

7. Protest Rights:

Any actual or prospective Offeror who is aggrieved in connection with the solicitation of this contract has the right to protest to Mr. Wayne Wilcher, Director, Contracts and Procurement, 3999 Bridge View Drive, Charleston, SC 29405, within ten (10) days of the date of issuance of the Request for Proposals (RFP) or other solicitation documents, whichever is applicable, or any amendment thereto, if the amendment is at issue. Any actual Offeror who is aggrieved in connection with the intended award or award of a contract has the right to protest to Mr. Wayne Wilcher, CPPO, Director, Contracts and Procurement, 3999 Bridge View Drive, N. Charleston, SC 29405, within ten (10) days of the date of notification of intent to award posting in accordance with Charleston County School District Procurement Code and Regulations.

8. Proposal Format:

All Offerors must provide at a minimum the information requested below. Any portion not included may result in the Offeror being deemed non-responsive and may be a cause for elimination from the proposal evaluation process. Any portions of the submitted proposal that are to be treated by the District as proprietary and confidential information must be clearly marked as such, however the entire proposal cannot be marked as such and will result in complete disclosure. Clarity and brevity are considered important in proposal presentation.

Interested construction management firms shall also respond to the invitation with the submission of a current and accurate Federal Standard Form 254, Architect-Engineer and Related Services Questionnaire, and Federal Standard Form 255, Architect-Engineer and Related Services Questionnaire for Specific Project, or their successor forms or similar information, and any other information which the particular invitation may require.

9. Proposal Focus:

Each Offeror is to respond fully to the technical evaluation submittal factors listed below. Note that each factor relates to the Specialized Project Requirements identified *above* in Paragraph 3. Therefore each Offeror should tailor their submittal response to each factor as it best relates to the specialized project requirements of this solicitation.

10. Minority Business Reporting Requirements:

Specify if your firm is a South Carolina Certified Minority Business. Provide the District with the copy of the certificate. The South Carolina definition of a minority business is a business that is at least 51% owned, operated, and controlled by a minority; or in cases of a publicly-owned business at least 51% of the stock must be owned by a minority. Such minorities include, but are not limited to, African Americans, Hispanic Americans, Native Americans and Eskimos. The firms selected to manage the Phase V 2023-2028 Capital Maintenance and Building Program will be required to report to the Owner any sub-contractor that is either a certified or non-certified minority business as well as the

monetary amount paid to that firm on a quarterly basis. This information will be provided to the Board of Trustees in a quarterly management report.

11. Terms and Conditions:

Upon successful negotiations, final terms and conditions will be developed using standard AIA Document C132-2019 Owner/Construction Manager as Adviser Agreement as amended by the Charleston County School District.

12. Evaluation Process:

The Technical Evaluation Factors shall consist of the following in descending order of significance:

- |          |  |
|----------|--|
| Factor A | Relevant Past Performance of the Firm                |
| Factor B | Technical Qualifications/Experience of Key Personnel |
| Factor C | Technical Approach                                   |
| Factor D | Minority Business Enterprise Participation           |
| Factor E | Location   |
| Factor F | Capacity to Performed Workload                       |

The following gives a description of each evaluation factor:

**Factor A – Relevant Past Performance of the Firm**

Past performance will be evaluated by examining program management accomplishments that best relate in scope, size and complexity to our specialized scope requirements. Identify up to three (3) relatively recent program management contracts to manage K-12 school building programs that best demonstrate quality performance on both new construction and renovation programs of similar nature to this solicitation. For each contract, provide the following:

- Title, location, award date, award amount, completion date, owner point of contact information.
- Short description of scope and responsibilities of referenced K-12 building programs.
- Provide name, telephone number and email address of a point of contact from each of the school districts referenced, letters of recommendation or letters of reference if available.
- Submit a brief narrative that demonstrates the value added by your program management services to your client's needs in terms of delivering the program

within budget, opening schools on time and designing and constructing high quality schools.

- Identify key personnel on the referenced contracts that are proposed as part of your project team for this solicitation such as: Principal in Charge, Program Manager, Project Managers, and key Site Managers.
- Identify schedule complexities of the programs and creative initiatives that benefited the Owner.

The District is not limited to information provided by the Offeror and may use any and all means of evaluating the relative capability of the Offeror to successfully meet requirements of the RFP. The evaluation may take into account performance of key personnel regarding predecessor companies, if applicable.

### **Factor B – Technical Qualifications/Experience of Key Personnel**

The proposed project team will be evaluated in relation to relevant experience demonstrated by key personnel to include: principal in charge, program director, project manager(s), quality assurance manager, site manager(s), cost estimator, scheduler, and financial controller. The Offeror will identify the key personnel that have worked on any of the programs referenced in Factor A. The Offeror will provide a list of up to three (3) relevant projects they have worked on in South Carolina in the past 3-5 years to include a short description of their roles and responsibilities for each of the key personnel. The Offeror will provide information on the experience that the proposed program director, project managers, and site managers have work with in South Carolina: Office of School Facilities, State Fire Marshall, Department of Transportation, and other key state regulatory agencies. Key personnel will be evaluated on their individual qualifications and their strengths as part of a proven project team. Therefore any substitutions of key personnel that occur after award are subject to approval by the Chief Procurement Officer's representative.

### **Factor C – Technical Approach**

Technical approach will be evaluated based on the Offeror's plan as it relates to methods used to insure projects are delivered that meet customer expectation in quality, timeliness, price, and suitability to the mission of the District.

- (1) **Logistics Management:** Demonstrate how your firm will staff the program to provide the Logistics Management support to coordinate to move management efforts during the course of each project, as well as other efforts to order, receive and place FFE and IT equipment to successfully open a schools on schedule;
- (2) **Quality Assurance:** Provide a copy of the firm's Quality Assurance Program and demonstrate how your proposed Quality Assurance Manager will ensure that each General Contractor provides adequate quality control and your firm provide adequate Quality Assurance to schedule the inspections required by Chapters 1 &17 of the International Building Code (IBC) and the South Carolina School Facilities

Planning and Construction Guide, as well as the work required by the TABs and Commissioning agents to properly commission all key systems.

- (3) **Scheduling:** Demonstrate expertise in job site scheduling control systems, list your scheduling software.
- (4) **Project Management:** Demonstrate expertise in web-based project management software. Describe how you will staff, monitor progress and ensure compliance with the project phasing, coordination, and scheduling requirements of the building program. Discuss your firm's ability to properly resource the team with experienced personnel to manage the district's projects to meet contract milestones;
- (5) **Financial Management:** Demonstrate how your firm's financial management system will allow your firm to properly manage the projects from authorization through financial closeout. Demonstrate how your proposed Financial Controller has successfully managed project funds on other building programs.
- (6) **Suitability:** Demonstrate how your firms performs:
  - (a) Value Engineering – Demonstrate how your firm performs Value Engineering analyses to keep a project within budget,
  - (b) Constructability reviews – Demonstrate how your firm performs constructability reviews on project designs at the SD, DD and CD phases to ensure that all school project designs comply with the district's most current design and IT guidelines,
  - (c) Plan Checks – Demonstrate how your purposed team can provide the needed technical skill sets to perform detailed plan checks at the DD and CD phases to ensure that critical areas comply with district practices and minimize change orders,
  - (d) Special Area Reviews – Demonstrate how your firm will use team members who are cross functional experts on key areas in a school during the DD and CD reviews to ensure these spaces comply with the district standards and best instructional practices.
- (7) **Public/Community Relations:** Demonstrate how your firm ensures positive public relations with the schools, PTSA's, School Improvement Councils, communities and media on the projects you have managed and enhanced the community relations of the districts that have invested in a major school building program. Demonstrate how your firm provides monthly project updates on the web.
- (8) **Project Delivery Methods:** Demonstrate your firm's past experience managing capital building and maintenance projects using different project delivery methods. If your firm's proposed team has not worked on a project using the Construction Manager at Risk or Design Building project delivery methods, please document the training commitment your firm will make to the proposed team to ensure they are proficient in these methods recently approved by OSF.

#### **Factor D – Minority Business Enterprise (MBE) Participation**

The Offeror will be evaluated on the basis of MBE participation. This PM professional services procurement and the district's proposed building and maintenance programs represent a major public investment in Charleston County



and an opportunity for the district to meet or exceed the Board of Trustee's MBE goals. Identify the actual percentage of dollar volume of work done by MBE Firms that participated in the programs your firms cited in Factor A. The Offeror must propose a MBE participation goal for certified and non-certified MBE participation that your firm will commit to achieving over the course of the six-year program. Provide a narrative strategy of how your firm will achieve the goal your firm has proposed and provide a set of assurances to meet your proposed goal.

#### **Factor E - Location**

Location will be evaluated based on the Offeror's demonstrated ability to provide highly responsive, timely project management and construction management services to each of the district's facilities in Charleston County. Describe proposed offices/locations of all key personnel identified in Factor B. Describe how your Principal in Charge shall conduct:

- (a) Program Reviews – demonstrate how your firm will conduct monthly reviews of your firm's performance of the projects assigned to ensure they are on schedule and within budget;
- (b) Internal Reviews – demonstrate how your firm will develop an internal review plan for critical areas that include: staffing, financial management, contracts management, quality assurance and safety.

#### **Factor F – Capacity to Perform Workload**

Capacity to perform the workload will be evaluated based on the Offeror's demonstrated the ability to provide adequate staffing for the projected maintenance program with personnel that are experts in the K-12 construction market with experience working in South Carolina. Describe how you all will staff up for the proposed Capital Maintenance Program, taking into consideration applicable recent, current, and projected workloads of the firm. Discuss resource management and contingency plans that will be used to guarantee the work identified will be completed to meet contract milestones.

### **13. Price Proposal Evaluation:**

In order for firms to be considered responsive, the firm will have to commit in writing to a maximum not-to-exceed percent of Board-approved Program Budgets (less construction management fees) for the capital maintenance program. This fee is to be submitted separately in a sealed envelope marked: Cost Proposal.

The District will negotiate the best-value fee with the most highly ranked Offeror. Best Value is defined as achieving the maximum guaranteed service within the available funding established by the District for that service through the negotiating process. If negotiations fail to produce a fair and reasonable price with the top-ranked Offeror then the District will proceed to negotiate with the second ranked Offeror, and then the third, etc., until a fair and reasonable price has been negotiated. If an agreement is not reached with one (1) of these, additional firms, in order of their competence and qualifications, must be selected after consultation with the District Selection Committee, and negotiations must be continued in the same manner until an agreement is reached.

	<b>Capital Maintenance Project List</b>	<b>Number of Projects</b>	<b>Funding Amount</b>
1	<b>Painting (Interior Wall Finishes &amp; Signage)</b>	<b>34</b>	<b>\$21,600,000</b>
2	<b>Flooring</b>	<b>26</b>	<b>\$13,500,000</b>
3	<b>Doors, Hardware &amp; Access Control</b>	<b>21</b>	<b>\$10,800,000</b>
4	<b>Roofing and Roof Systems</b>	<b>42</b>	<b>\$54,000,000</b>
5	<b>Exterior Envelope</b>	<b>40</b>	<b>\$5,400,000</b>
6	<b>Kitchen Systems, Coolers/Freezers</b>	<b>9</b>	<b>\$2,700,000</b>
7	<b>Plumbing, Fixtures, Restrooms (Source to Effluent)</b>	<b>14</b>	<b>\$16,200,000</b>
8	<b>HVAC/Exhaust</b>	<b>17</b>	<b>\$76,099,000</b>
9	<b>Hard Surface Paving (6)</b>	<b>27</b>	<b>\$8,100,000</b>
10	<b>Lighting</b>	<b>13</b>	<b>\$2,700,000</b>
11	<b>Fire, Life Safety, and Security</b>	<b>8</b>	<b>\$5,400,000</b>
12	<b>Electrical Distribution</b>	<b>14</b>	<b>\$2,700,000</b>
13	<b>Ceiling Systems</b>	<b>20</b>	<b>\$2,700,000</b>
14	<b>Built-in Cabinetry &amp; Equipment</b>	<b>15</b>	<b>\$2,700,000</b>
15	<b>Stormwater Conveyance &amp; Storage</b>	<b>99</b>	<b>\$5,400,000</b>
16	<b>Security Perimeter/Fencing</b>	<b>104</b>	<b>\$2,700,000</b>

<b>17</b>	<b>Playgrounds &amp; Play Surfaces</b>	<b>42</b>	<b>\$8,100,000</b>
<b>18</b>	<b>Exterior Appearance &amp; Signage</b>	<b>30</b>	<b>\$2,700,000</b>
<b>19</b>	<b>Athletic Facilities (High Schools)</b>	<b>53</b>	<b>\$13,500,000</b>
<b>20</b>	<b>Elevators and Lifts</b>	<b>6</b>	<b>\$1,350,000</b>
	<b>TOTAL</b>	<b>634</b>	<b>\$258,349,000</b>