

SBA 171

DESIGN BUILD SERVICES

DRAFT

INVITATION FOR QUALIFICATIONS (IFQ)

_____, 20__

**Design-Build Services
For**

A proposal in response to this IFQ must be submitted to the _____ **no later than** _____ **on** _____, **20**__. It must be plainly marked:

Proposal for IFQ Design-Build Services for

The responsibility for submitting a response to this IFQ at the _____ County Board of Education office located at _____ on or before the stipulated time and date will be solely and strictly the responsibility of the proposer. The _____ Board of Education will in no way be responsible for delays caused by the United States Postal Service or caused by any other occurrence. Any proposals received after the stipulated time and date will not be accepted, nor opened, and will be returned. A bid bond equivalent to 5% of the construction cost must be provided with the cost proposal. Specific project information can be obtained by contacting _____ at _____. Questions concerning the specifics of the project(s) should be directed to _____ at _____.

_____ **COUNTY BOARD OF EDUCATION**

Office of _____

INVITATION FOR QUALIFICATIONS

Design-Build Services

For

_____ **(School)**

_____ **(Date)**

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SECTION 1 – INVITATION FOR QUALIFICATIONS (IFQ)

Pursuant to West Virginia Code 5-22A-1 and Legislative Rules 148-CSR-11 the _____ County Board of Education intends to contract with a Design-Build firm/team to provide professional services for:

Selection of the Design-Builder shall conform to the State of West Virginia’s Consultants Competitive Negotiations Act and shall satisfy qualification requirements as defined by West Virginia Code 5-22A-1 and et. seq. and Title 148, Legislative Rules for selecting Design-Builders under the Design-Build Procurement Act. _____ County Board of Education reserves the right to reject any or all IFQ proposals if it is determined to be in the best interest of the county board of education.

The successful Design-Builder will be expected to enter into a single point of responsibility agreement with _____ County Board of Education to provide complete professional architectural and engineering design services, permitting and construction services including all labor and materials for the completion of the project.

Firms/teams interested in providing design/build services to _____ County are hereby notified that Proposals for providing the requested services in response to this IFQ will be accepted until _____ and must be received by mail or delivered in hand to the following location. Proposals received after this deadline will be disqualified.

_____ County Board of Education

The proposal is limited to 25 pages (excluding the required SBA forms) and shall be presented in a binder format, tabbed according to the Evaluation Criteria. Proposals will not be reviewed until expiration of the time established for making proposals as set forth in the IFQ. One (1) original and ten (10) copies of the proposal shall be submitted which are clearly labeled with the project name and the name of the submitting firm/team.

The format of the proposal shall be in strict conformance with the stipulated criteria in Instructions to Submitting Firms/Teams (Section 3) and the Selection Process (Section 4).

A Selection Team will review the proposals and evaluate the qualifications of each Design-Build firm/team. Interviews will be scheduled and the selection committee will evaluate and score each firm/team based on the proposal information and the interview. A minimum of three-five firms/teams will be selected to submit a Request for Proposal to complete the design and construction of the project based on Performance Criteria provided by the Owner.

SECTION 2 – PROJECT DESCRIPTION

A. Scope of Work

In general, the work consists of the following: (insert project description and timeline)

B. Budget

The budget for the Design-Build project will be based on the pre-design/construction cost and the design/construction cost together with all other soft costs associated with the project. A preliminary budget has been established by the owner and the SBA for performance criteria development purposes. However, the final budget will be established based on the acceptance of the Design-Build team's proposal together with the pre-design/construction cost. The final budget will be subject to the approval of the owner and SBA.

C. Owners Anticipated Pre-Construction Schedule

- 1. Advertisement/IFQ _____
- 2. Design-Build Qualifications Due _____
- 3. Oral Presentations by Firms/Teams _____
- 4. Evaluation of IFQ _____
- 5. Recommendation of Selected Short-List Firms/Teams _____
- 6. Notification of Short List Firms/Teams _____
- 7. Invitation for Proposals Mailed _____
- 8. Response to IFP Due _____
- 9. Award of Design-Build Contract _____
- 10. Anticipated Substantial Completion _____

SECTION 3 – INSTRUCTIONS TO SUBMITTING FIRMS/TEAMS

A. General

This Invitation for Qualifications (IFQ) is the first in a two-stage selection process in Design-Build services. The selection process will be conducted as follows:

- Stage 1: The responses to this IFQ will be reviewed by a Selection Team in accordance with the process and evaluation criteria contained in Section 4. The Selection Team reviews the proposals and schedules interviews with firms/teams to discuss the IFQ submission information. The Selection Team will then score each firm/team submission based on the IFQ and interview. The Selection Team then will short list no fewer than three firms but no greater than five firms to continue on to Stage 2 of the selection process.
- Stage 2: Each of the three to five firms/teams short listed will be given the Request for Proposals (RFP) including the project performance criteria, educational specifications and the submission schedule for the RFP.

B. Mandatory Pre-Presentation Meeting

The short listed firms/teams will be required to attend a Mandatory Pre-Presentation Meeting. The meeting will be scheduled by _____ County Board of Education a minimum of five (5) days prior to the presentation date. The time and date of the meeting will be announced a minimum of 48 hours in advance. The short listed firms/teams are required to visit the project site prior to the Mandatory Pre-Presentation Meeting.

C. Questions

Questions regarding the completion and submission of the proposal should be directed to _____ . Any communication, written or verbal, with other county or SBA representatives may be grounds for disqualification. Technical questions by the short listed firms/teams regarding the Design Criteria Package or the presentation must be received in writing via facsimile and directed to the attention of _____ . The deadline for technical questions is _____(time) on _____ (date). A written response will be provided to all questions received no later than _____(date). Responses will be in writing to all short-listed firms/teams.

D. Expenses Incurred in Preparing Responses

_____ County accepts no responsibility for any expenses incurred by those firms/teams offering their services to the Board either in the preparation of a response to this IFQ or subsequent presentation. All expenses shall be borne by the offering firms/teams exclusively.

E. Design-Build Qualifications

Firms/teams submitting a response to this IFQ must qualify under the Design-Build Board of West Virginia. Corporations must be a registered vendor in the State of West Virginia prior to submission of their proposal. Joint ventures, if selected, will be expected to sign a form of contract making each venture jointly and severally liable for its actions and its co-venture's actions under this contract, or alternatively to provide a copy of an executed, formal joint-venture agreement that so binds each to the other. All contractors and subcontractors must have a contractor license in the State of West Virginia. Standard AIA Documents will be used for this project unless otherwise waived by the SBA. In addition, the bidder(s) must provide pertinent financial information within the IFQ response including the SBA Qualification Statement.

F. Bonding and Insurance Requirements

The Design-Builder ultimately selected will be required to obtain a Performance Bond and a Labor and Materials Payment Bond. Errors and Omissions Professional Liabilities Insurance will be required for the Design Professional(s). If selected, insurance in the form of General Liability, Automobile, Worker's Compensation and Employees Liability will be required of the construction contracting entity with minimum coverage's defined below:

Insurance Description and Minimum Required Coverage

1. Worker's Compensation/Employers' Liability
Statutory – State of West Virginia – Compensation through State Fund.
Employer's Liability – Limits Required:

\$500,000 – each employee
\$500,000 – each accident
\$500,000 – aggregate
Coverage must include legal liability brought under West Virginia Code Annot. (1978) Section 23-4-2.

2. Contractor's Public Liability Insurance Limits Required:
\$2,000,000 – General Aggregate
\$1,000,000 – Products Complete Operations Aggregate
\$1,000,000 – Personal & Advertising Injury Limit
\$1,000,000 – Each Occurrence Limit

Commercial General Liability must include:

Explosion, Collapse and Underground Property Damage. Coverage required, if contractor's operations warrant such coverage. Also, if blasting operations, separate blasting coverage is required.

3. Automobile Liability Insurance
Limits Required:
\$1,000,000 – Per Accident
Provide "Any Auto" Coverage
4. Excess Liability Insurance
Limits Required:
\$2,000,000 – Combined Single Limit Occurrence
\$2,000,000 – Aggregate
5. Builders Risk and Property Insurance
100% Completed Value Form
Coverage Format:
All Risk including theft

Coverage shall include transit and off-site storage/secondary location limit amount that exceeds any shipment or off-site storage material value before payments to contractor for off-site stored materials are approved. Proof of coverage limits exceeding accumulated value of materials stored is required.

Names Insured shall be Owner, Contractor and all Subcontractors ATIMA.

Deductibles shall be stated in the Certificate of Insurance. Payment of deductible shall be the responsibility of the contractor.

If a renovation to an existing building, the Owner will provide coverage while under Construction by adding the contractor and all subcontractors, ATIMA to the permanent property policy.

SECTION 4 – QUALIFICATION PROCESS

Selection Team

The Proposals received in response to this IFQ will be evaluated and ranked by a Selection Team. This process will also include an oral presentation by qualified Design-Build firms/teams. Once the interviews are completed, the Selection Team will rank each Design-Build firm/team using the rating system established within the IFQ. The Selection Team will select (short list) no fewer than three (3) but not greater than five (five) firms/teams to be invited to submit response to a Request for Proposal (RFP). The members of the Selection Team are:

Name	Affiliation and Title
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Evaluation Criteria

The following Criteria are intended to provide the Selection Team with information regarding the qualifications of each proposing Design-Build firm/team. Proposals shall address each of the Criteria in the same order listed in Attachment _____.

A. Proposal Letter

Firms must provide an original letter stating their intent to qualify for this project under the Design-Build Act of West Virginia and their acceptance of the terms and conditions contained in this IFQ. The letter must be signed by an officer(s) of the proposing firm(s) or the prime team member(s).

B. Project Understanding

Clearly demonstrate your firm/team’s understanding of the scope of the project. Present a concise outline of specific services your firm/team is qualified and prepared to provide for the project. Identify and discuss any of the services, or method of approach to the

services, which your firm/team believes to be either “unique” or “outstanding,” or which may be recognized as giving your firm/team a competitive edge or advantage.

C. Team Organization and Personnel Resumes

Provide information describing the Design-Build team being proposed and the experience of the individual firms comprising the team. If your team is a joint venture or a team consisting of a prime firm with a consultant and sub-consultant relationship, describe your organizational basis. Describe the number and type of projects your team has completed together and the number of years of working experience together. Identify each entity discipline and responsibilities of the team. Indicate key personnel and their relationship to this project and other team members. Provide an organization chart identifying design and construction personnel proposed for the project. Provide resumes of key personnel, their disciplines, respective roles, education, licenses and their experience in Design-Build. Identify their experience as related to educational facilities. Explain the status of the current workload of your design entity and construction entity, addressing the availability of the lead personnel proposed for this project.

D. Architect Team Member Project Experience

Submit the design experience of the West Virginia Registered Architect member (minimum of five years), documenting the most recent evidence of school design experience and SBA school design experience. Provide qualifications and experience of key management and professional staff and other staffing proposed to complete this project. Identify projects of comparable size, complexity and cost to this project, defining specific services provided. Provide information regarding experience on SBA projects. Include renderings or photographs, if feasible. Include appropriate information describing the scope and nature of the projects. Identify the lead personnel on each project, their respective responsibilities and if they are proposed for this project. Comment on the commitment to involve lead design personnel assigned to the project through the design and construction phase. For each of the projects listed, identify the client’s name and contact person, address, phone numbers, dates of services performed and references. Submit current Standard Forms 254 and 255. Submit current West Virginia Architectural License for the firm.

E. Contractor Team Member Project Experience

Submit the construction experience of the West Virginia Licensed General Contractor entity, documenting evidence of the successful construction of recent school construction. Provide information regarding experience on SBA projects. Identify projects of comparable size, complexity and cost of this project, defining specific services provided (General Contracting or Design-Build). Comment on project schedules and budgets and the adherence to those items. Identify the lead personnel on each project, their respective responsibilities and if they are proposed for this project. For each of the projects listed, identify the client’s name and contact person, address, phone numbers, dates of services performed and references. Also, provide the name and telephone number of the

architectural firm and project architect responsible for the projects. Submit an SBA Contractor's Qualification Statement and a copy of your current West Virginia General Contractor License

F. Proximity to Project/Availability

Provide the business address of the prime or lead firm's office from which any part of the work will be administered and the distance of the office (in hours) from the project site. (Do not list a job site trailer address). If submitting a joint venture, list the address of both firms and the distance (in hours) from the site of the managing office from where work will be administered. Provide the distance (in hours) between the business address of the construction entity and the office of the design entity performing the design work.

G. Project Approach

Comment on your approach toward accomplishing the design and construction phases necessary to achieve Substantial Completion in a timely manner. Describe the management approach and communication procedures you will employ throughout the design and construction of the project. Describe your reporting procedures, frequency and process for obtaining design/program input from the county board and SBA. Describe your plan to establish and maintain clear lines of communication with the county project manager and the SBA staff. Provide examples of Management Information Reporting Systems, Quality Control, Partnering, etc. Describe and provide examples of how you propose to resolve conflicts and negotiate changes. Additionally, describe how safety and drug testing will be addressed during the project.

H. Schedule/Cost Control

Describe your cost and scheduling methodology and the project management method you will use for effectively managing and executing the work on time and within budget. Include a disclosure of the present work load for your design and construction team. Provide information about operational timelines for accomplishing work requested by this proposal and samples of schedules and cost estimate formats. Provide a comparative chart showing your recent schedule and cost control successes on similar educational projects. Provide examples of how you propose to control quality and your quality assurance programs. Also, include your Value Engineering, Life Cycle Cost Analysis, Constructability Review strategies.

I. Local Labor Participation

Projects receiving SBA or other state funding must comply with the West Virginia Department of Labor and Workers Compensation requirements and other pertinent codes. Indicate the efforts your firm/team has made regarding local labor force being used on project(s). Additionally, indicate what efforts your firm/team has made, or intends to make, to comply with West Virginia Code 21-1C, (West Virginia Jobs Act) on this project.

J. Financial Strength and Bonding Capacity

Provide a statement indicating the financial capability of the firm/team to provide the resources required including:

1. A letter of intent from a surety company indicating the applicant's bonding ability for this project (performance and payment bond) for an amount in excess of the budget shown in Section 2 of this IFQ. The performance and payment bond will be a sum of 100% of the amount of the construction contract. To be acceptable to the Owner as Surety for performance and payment bonds, a Surety Company shall comply with the following provisions:
 - a. The Surety Company must be licensed to do business in the West Virginia.
 - b. The Surety Company shall have been in business and have a record of successful continuous operations for at least five years.
 - c. The Surety Company shall have at least A.M. Best Company, A or better rating listed on the most current federal register, circulation 570, which is authorized to do business in the State of West Virginia and which is satisfactory to and approved by the Owner and the SBA.
2. Provide audited financial statements for the most recent two years, including income statement, balance sheet, statements of change in financial position and notes to financial statements. This information may also be included in the contractor qualification information provided.
3. Provide all material changes in the business operations of the firm, including without limitation any bankruptcy proceedings, mergers, acquisitions, or spin-offs and any material pending or threatened litigation, which have occurred within the last five (5) years. Discuss the impact of these changes on the firm's financial or managerial ability to perform the task under the proposed capital plan.
4. Provide the name, title, address and phone number of the financial officer of the firm responsible for providing the information in response to this requirement.

The financial information requested above, and copies of any rating reports, are not included in the IFQ's 25 page limitation. Proposers wishing to preserve the confidentiality of this information may do so by providing one (1) original of the information in a separate envelop labeled "Confidential – proprietary financial information."

K. Litigation

Identify all litigation in which your firm/team has been a party to legal action (including arbitration, administrative proceedings, etc.) or lawsuits during the last five (5) years

involving a single client for claims in excess of \$50,000. Include a brief legal description of the dispute and its current status and whether the action or lawsuit has involved a Design-Build contract. Also, describe the particular circumstances giving rise to the dispute and the actions which your firm took to attempt to settle the matter prior to and after the suit being filed. Describe in detail any projects within the last five (5) years where liquidated damages, penalties, liens (in excess of \$50,000), defaults, cancellations of contract or termination of contract were imposed, sought to be imposed, or filed against your organization.

L. References

Provide a list of client references for project completed by the architectural and construction team members. Each referenced project must have construction cost, year completed and client contact information.

SECTION 5 – SELECTION PROCESS

Proposal Evaluation

The Selection Team will evaluate the Design-Build Team qualifications received in response to this IFQ based on the Evaluation Criteria in this Section and the oral interview, which will be weighted in accordance with the Selection Team Rating Sheet contained at the end of Section 5. The Selection Team will select (short list) no fewer than three (3) firms/teams with the highest total points (the sum of the scores given to each firms/teams by all voting members of the Selection Team). The short listed firms/teams will be notified and will be given the Design Criteria Package to prepare their proposals.

Oral Presentations

Qualified firms/teams will make oral presentations to the Selection Team to review their qualifications. The short listed firms/teams will be given ___ minutes for an oral presentation. The format of the presentation should be structured to clearly address the Evaluation Criteria contained in Section 4 of the IFQ. Presentation boards and handouts are acceptable. A projection screen will be available for use by the short listed firms/teams if prior notice is given to the Owner. The Selection Team will have ___ minutes for questions, but under no circumstances will the total time of _____ be exceeded.

Final Selection

The Selection Team will evaluate the qualifications of the firms/teams after the oral presentations based on the Selection Team Rating Sheet contained in these instructions. The Selection Team will notify a minimum of three (3) but no greater than five (5) firms/teams selected (short listed) to provide a Request for Proposal (RFP) for the project. The timeline for responses to the RFP will be provided to each of the short listed

firms/teams. The short listed firms will be provided all project information and provided the schedule for submission of the RFP. The RFP will provide specific submission requirements and evaluation procedures in accordance with the Design-Build Procurement Act and Legislative Rule 148-CSR11.

SELECTION TEAM RATING SHEET
Invitation for Qualifications

Design Build Services

 (Project Name)

Company _____ Proposal Letter _____ Y _____ N

Team Members _____ Date _____

Evaluation Criteria	Criteria Value Potential	Score	Remarks
Project Understanding	10	_____	_____
Project Team	10	_____	_____
Architect Project Experience	5	_____	_____
Contractor Project Exp.	5	_____	_____
SBA Experience	10	_____	_____
Proximity/Availability	5	_____	_____
Project Approach	10	_____	_____
Project Schedule	15	_____	_____
Cost Control/VE	10	_____	_____
Local Participation Jobs Act/Local Contractors	5	_____	_____
Financial Strength Bonding	5	_____	_____
Litigation	5	_____	_____
Client References	5	_____	_____
GRAND TOTAL	100%	_____ %	(must score minimum of 70 pts to be considered)

Comments: _____

Signature _____ **Date** _____