

Request For Qualifications for Design-Build Contracting for High-Performance Facilities

Live Oak County
George West, Texas

Live Oak County, (hereafter, “Owner”), is requesting qualifications from interested and qualified firms for the development, design, build, and ongoing optimization of various facility projects to meet the Owner’s high-performance objectives. The Owner understands that first cost is not the only factor in facility ownership. Responding firms shall be able to quantify life cycle costs or total cost of ownership with all potential projects to help owner remain competitive in today’s marketplace. Preference will be given to firms that are vertically integrated with a full staff for design build delivery. Owner sees value in having the same company that helps to determine the project goals and criteria also deliver the project. Vertically integrated firms shall have engineers (PEs), Architects, and construction delivery professionals on staff.

Owner plans to select the most qualified firm for high performance design-build projects in accordance with Local Government Code 262.023 which provides for the usage of Texas Government Code 2269 Subchapter G Design Build Contracts for Facilities. Owner intends this to be a one step process based on qualifications only. Owner may opt to interview the top 3 respondents in the event that the qualifications are closely matched.

Owner reserves the right to add a 2nd step to this evaluation at its sole discretion, if qualifications alone are not sufficient for selection. Per Texas Government Code 2269 Subchapter G, Owner may choose to evaluate respondents on the basis of the safety, feasibility of implementing the project as proposed, ability of the offer or to meet schedules, or costing methodology.

The selected high-performance design-build firm shall partner with Owner to develop and deliver a comprehensive program to upgrade and/or improve facilities via the following basic process:

- 1) A detailed assessment that establishes short, medium, and long term needs and opportunities, budgets, operating cost baselines and a roadmap for optimization;
- 2) Co-development with the Owner of a plan for implementation;
- 3) Design and installation of work according to the plan;
- 4) Commissioning of systems for performance;
- 5) Training of existing personnel in the operation and maintenance of installed systems; and,
- 6) The ability to provide additional services to maintain and improve the Owner’s high-performance objectives.

Qualified firms capable of fulfilling all the steps of this process should complete a statement of qualifications according to this RFQ and submit sealed responses no later than:

March 26, by 4:00 PM

Responses shall be submitted to:

Location Live Oak County Auditor’s Office
Address: 301 Houston St, Room 302
City, St, Zip: George West, Texas 78022
Mailing: PO Box 699
City, STZip: George West, Texas 78861

Responses submitted after the date and time listed above will not be accepted or considered. Final selection will be made in accordance with the policies and administrative directive of the Owner and other statutory provisions.

Owner reserves the right to refuse and reject any or all responses, waive any or all formalities or technicalities, accept the response or portions of the response determined to be the best value to the Owner, and hold the responses for a period of 120 days without acting. Respondents are required to hold their responses firm for the same period.

SECTION I — GENERAL INFORMATION

1) Purpose

First, cost in facilities is an important consideration, however the ongoing cost to operate and maintain facilities represents greater than 85% of the overall cost of owning facilities. Owner desires to work with a qualified firm that is experienced in developing, designing, implementing, and optimizing outcomes of existing facility renovation / upgrade programs and projects. This request for qualifications (RFQ) for high-performance design-build services will enable Owner to select a long-term strategic partner to develop and implement improvements at the Owner’s facilities that will optimize both initial capital costs and operating costs.

2) Preliminary Scope of Work

Owner proposes to address building needs including, but not limited to the following facility:

Facility	Address
LIVE OAK COUNTY FIRE STATION	TBD

Specific scope may include, but is not limited to the following:

- Windows
- IT/Electrical
- Ductwork & Insulation
- Lighting
- HVAC
- Building Envelope
- Plumbing
- Kitchen Equipment
- Back Up Generation
- Security Measures
- Others

Owner reserves the right to modify and or change the included facilities and/or the specific scope of work over time.

Respondents shall be required to perform the following components of high-performance design-build work:

- 1) A detailed infrastructure assessment that establishes short, medium, and long-term needs, budgets, operating cost baselines and a roadmap for optimization. Deliverable should be consistent with a long-term capital plan or facilities master plan and incorporate first cost versus life cycle cost analysis.
 - a) Systems and methods to be evaluated may include but are not limited to:
 - i) Envelope (roofing, windows, etc.)
 - ii) Electrical systems
 - iii) Lighting systems (indoor and outdoor)
 - iv) Mechanical systems (heating, ventilation, air conditioning, domestic water, etc.)
 - v) Plumbing systems
 - vi) Fire and life safety systems
 - vii) Distributed Antenna Systems (ERRS or Cellular)
 - viii) Access Control Systems/Video Surveillance
 - ix) Building Automation Systems
 - x) Miscellaneous infrastructure or systems that have a significant ongoing operating cost
 - xi) Sustainability measures (Renewables, battery integration, EV charging, Decarbonization, Net Zero, Net Zero +, EAAS etc.)
 - b) Areas of performance to be evaluated for potential optimization:
 - i) Energy demand and consumption (benchmarks through Energy Star, EUI/ECI, etc.)
 - ii) Staffing for operations and maintenance
 - iii) Space and facility use
 - iv) Workorder management systems
 - v) Central plant, hydronics, air-side equipment, unitary equipment, terminal and end devices, and other miscellaneous equipment through:
 - (1) Fault detection and diagnostics
 - (2) Predictive maintenance
- 2) Co-development with the Owner of a plan for implementation that factors
 - a) Owner's project criteria
 - b) Compliance to energy and building codes
 - c) Phasing / timing of work
 - d) Optimization of supply chain
 - e) Funding
- 3) Design and installation of work according to the plan
 - a) Schematic and construction level designs
 - b) Bid solicitation, RFIs, contractor qualification and procurement
 - c) Project management and on-site supervision of work
 - d) Project financial management, including contingency and change order management
 - e) Quality assurance and control
- 4) Commissioning of systems for performance,
 - a) Test and balance of mechanical systems (if required)
 - b) Validation of implementation according to design intent
 - c) System inspection to adhere to operational intent
- 5) Training of existing personnel in the operation and maintenance of installed systems
 - a) Measure specific training
 - b) Sustainable operations training (if required)
 - c) Data analytics / dashboard training (if required)
 - d) Assistance with computerized maintenance management system (CMMS) improvements or implementation (if required)
- 6) Ongoing optimization of operations.
 - a) Measurement and verification of operational KPIs against targets (if required)

- b) Continuous optimization of systems using available data analytics (if required)
- c) Dashboarding and reporting of operational KPIs

Additionally, preference will be given to Respondents who can provide some or all of the following additional services, which the Owner may desire in this project:

- Training of staff on energy education and awareness, monitoring and accountability of project performance
- Consulting on funding/financing
- Sustainability consulting services and additional research on energy efficiency or sustainable initiatives.
- ENERGY STAR® Portfolio Analysis,
- LEED® Certification for Existing Buildings
- Retail electric portfolio review,
- Providing financial feasibility or other special studies
- Guarantee of outcomes
- Installation of additional systems and equipment, and
- Services for systems and equipment as requested by the Owner.

3) High Performance Design-Build Contracting

For the purposes of this document, "High Performance Design-Build Contracting" means a single contract with a design-build firm that develops, designs, installs, and manages optimization of improvements and/or upgrades to facility infrastructure in existing facilities. "Design-build firm" means a partnership, corporation, or other legal entity or team that includes an engineer or architect and builder qualified to engage in building construction in Texas.

4) Calculation of Benefit - Operational Outcomes

The high-performance design-build contractor shall, if requested by the owner, provide detailed evaluation and calculations of ongoing operating costs (maintenance, operations, energy, fuel, water, etc) of both the baseline and proposed improvements that can be verified by industry standards through qualified 3rd parties.

5) Eligible Respondents

To effectively manage the risk to Owner, the Owner requires a high-performance design-build contracting/service team with total capability to evaluate, develop, design, install, and support the desired infrastructure upgrades. The dedicated team (subcontractors not included) shall have a minimum specific experience providing high performance projects / programs. Respondents should be able to provide all required services outlined above, with preference given to respondents that can provide as many of the additional services as possible. Responses from other parties shall not be considered.

6) Format

Qualifications must be submitted in the format outlined in this document. Each response will be reviewed to determine if it is complete prior to actual evaluation. Qualifications not containing the information requested will not be considered. Respondents shall use the prescribed format to clearly indicate their experience and qualifications, describe their technical approach to this project, and demonstrate past successes. Qualifications will be evaluated in light of the material and substantiating evidence presented in the response, and not on the basis of what is inferred.

7) Contract Responsibility

The selected contractor will be required to assume total responsibility for all services offered in their response. The selected contractor will be considered the prime contractor and the sole point of contact with regard to all contractual matters. The agreement shall not be changed or canceled without prior written notification to

Owner. The Owner intends to use this solicitation to enable execution of a holistic strategy through a Master Services Agreement (MSA) with individual projects contracted as Statements of Work (SOW) attached to the MSA, independently negotiated and approved by Owner.

8) Bonds and Insurance

The successful respondent shall procure and maintain in effect during the life of the agreement commercial general liability insurance in amount not less than \$1,000,000 for each occurrence, comprehensive automotive liability insurance in amount not less than \$1,000,000, and workers compensation insurance in accordance with the Worker’s Compensation Act of the State of Texas to adequately protect the interests of Owner for all labor employed by the contractor. Evidence of required bonds and insurance shall be presented prior to execution of a contract. Insurance policies to be carried under the agreement shall not be changed or canceled without prior written notification to Owner.

9) Taxes, Fees, Code Compliance, Licensing

The high-performance design-build contractor shall be responsible for payment of any required taxes or fees associated with the execution of the contract. The high-performance design-build contractor shall be responsible for compliance with all applicable codes and statutes. All engineering, design, installation, and construction work shall be done by contractors licensed in the State of Texas.

10) References and Proprietary Information

Submission of a response deems permission to make inquiries concerning the Respondent and its officers and to any persons or firms deemed appropriate by Owner. Any proprietary information that the contractor does not want disclosed to the public shall be so identified on each page in which it is found. Data or information so identified will be used by Owner solely for the purpose of evaluation and contract negotiations.

11) Inquiries

Questions that arise from Respondents prior to qualifications submission shall be submitted in writing to Owner.

Written questions must be submitted at least ten (10) business days prior to the due date, and must be emailed to **Regina Dove, Live Oak County Auditor.** rdove@co.live-oak.tx.us.

12) Schedule of Events

Owner expects to undertake the selection process according to the following schedule:

Request for Qualifications Issued	March 4, 2024
Submission of Qualifications Due	March 26, 2024 – 4:00 PM
Contractor Selection	March 27, 2024

SECTION II—RESPONSE FORMAT AND PREPARATION INSTRUCTIONS

Responses must be submitted in the format outlined in this section. Provide five hard copies of your response and one electronic copy. Each response will be reviewed to determine if it is complete prior to actual evaluation. Owner reserves the right to eliminate from further consideration any response which is deemed to be substantially or materially unresponsive to the requests for information contained in this section. The intent of Owner is that all responses follow the same format in order to evaluate each response fairly. Qualifications will be evaluated in light of the material and substantiating evidence presented in the qualifications, and not on the basis of what is inferred.

The Request for Qualifications is limited to 50 pages. Do not include additional documents as an appendix. Number the pages in each section consecutively. Each page shall have the name of the respondent indicated clearly.

1. Table of Contents

Responses shall include a table of contents properly indicating the section and page numbers of the information included. This page is not included in the 50-page response limitation.

2. Executive Summary

Responses shall include an abstract of no more than two pages on the information presented in the qualifications and the contractor's unique qualifications and services.

3. Background, Experience & Capabilities

A. Background and Firm Profile

Provide general information on the responding firm, including: name, business location, local telephone number, and contact person for this project. Describe the firm's approach to high performance design-build contracting.

B. Project Team

List the members of the project team that will develop, design, project manage, install, and service the installed systems (do not include subcontractors). Provide a list of the firm's personnel to be used on this project and their qualifications. Indicate the following about the team that will be permanently assigned to this project: number of years in energy services contracting and a one page or less resume including education, experience, and any other pertinent information for each team member assigned to this project.

C. Capabilities

Provide a description and examples of your firm's capabilities that support the description in Section 1, General Information. Be sure to include any and all capabilities that you believe add value to the owner.

D. References

The respondent shall include at least five (5) references that shall indicate the ability to deliver a full range of high performance design-build services as the prime contractor. Provide the owner's name, address, telephone number, contact person, and a brief one-paragraph overview of the services performed for each reference.

4. Technical Approach

A. Program Development

Indicate the respondent's approach to performing detailed infrastructure needs assessments, collaborative development (with Owner) of a comprehensive solution with phasing / implementation plans, identification and design of improvement measures, and assistance with other aspects of developing high performing facilities.

B. Program / Project Management

Indicate your firm's approach to managing holistic programs and resulting projects. Include a representative timeline showing the necessary steps and resulting schedule for all aspects of development, design, implementation, and ongoing optimization of the program including assistance

with LEED Certification and/or Energy Star (if applicable) and corresponding project(s). Describe the various responsibilities and coordination of your team members for effective project management including subcontractor selection and management.

C. Financial Projections

Indicate your firm's approach to estimating the financial benefits in ongoing operating costs associated with high performance facilities. Describe the methodology, processes and tools used to effectively calculate operational benefit and resulting financial ROI.

D. Training

Provide an overview of the training that will be provided to Owner personnel. The respondent will also include information about programs available for promoting optimized operation awareness among staff.

5. Risk-Mitigating Strategies

Describe any risk-minimizing strategies intended to protect the Owner.

6. Additional Benefits

Describe any other benefits Owner will realize through this contract using your firm's team.

SECTION III—SELECTION CRITERIA

1. Completeness

Each response will be reviewed prior to the selection process for completeness and adherence to format. A response will be considered complete if all requested sections are included in the proper order.

2. Formal Evaluation

A. Evaluation Process

Owner elects to use a one step process for selection of the High Performance Design-Build Contractor using qualifications only. Owner will appoint a selection team to formally evaluate each response. The evaluation process will objectively grade the responses on their merit and responsiveness. Responses will be evaluated in light of the material and substantiating evidence presented in the response, and not on the basis of what is inferred. The evaluation process can include verification of team references, verification of project team resumes, confirmation of financial information, and any other information as deemed material to the final selection by Owner during this process.

B. Grading Format

Each section or subsection of the RFQ response will be considered a separate selection criterion and will be graded individually. The point value for each criterion shall be multiplied by the percentage grade to give the criterion score. All scores will be summed to give the grand total score. The maximum possible grand total score for the RFQ response is 100 points. Scoring will be summarized on the Formal RFQ Evaluation Form.

C. Point Values

Experience & Background	50 Total Points
Firm Profile	5
Project Team	20
Capabilities	20
References	5
Technical Approach	30 Total Points
Program Development	10
Program / Project Management	5
Financial Projections	5
Training	5
Risk Mitigating Strategies	5
Financial Approach	10 Total Points
Funding Methods	5
Operational and Financial KPIs	5
Additional Benefits	10 Total Points
Grand Total	100

D. Percentage Grades

Grade	Description
0%	Criterion was not addressed in the response or the material presented was totally without merit.
20%	Criterion was addressed minimally, response indicated little capability, experience, or understanding of topic.
40%	Criterion was addressed minimally, but response shows some capability, experience, or understanding of topic
60%	Criterion was addressed adequately. Overall, a basic capability, experience, or understanding of topic
80%	Criterion was addressed well. The response indicates some superior features.
100%	Criterion was addressed in superior fashion, indicating excellent or outstanding capability.

E. Example

Firm Profile has a point value of 15 points. If Response A addresses the topic well (the definition of the 80% grade), the 15-point value for the criterion would be multiplied by 80%.

<u>Point Value</u>	<u>Grade</u>	<u>Score</u>
15	80%	12.0

3. Final Selection/Notification

The grand total scores of the RFQ response summed. The Respondent with the highest sum shall be selected. Owner will notify the selected firm.

4. Development Stage Proposal

Once a final selection has been made, the selected firm will submit a proposal to Owner for the initial stages of the detailed infrastructure assessment, operational baselining, and roadmap development. The proposal shall be negotiated to provide clear steps and stage gates for the Owner and selected firm to have a complete and mutual understanding of the engagement process, including scope, fees, deliverables, stakeholder engagement and approval steps. In general, the proposal shall outline the steps according to the Design Build Institute of America's DBIA520 Preliminary Services Agreement structure:

1. Preliminary Services
2. Schematic level designs
3. Design Build proposal
4. Additional Services

Name of Respondent			
Section Name	Point Value	Percentage Grade	Score
Experience & Background			
Firm Profile	5		
Project Team	20		
Capabilities	20		
References	5		
Technical Approach			
Program Development	10		
Program / Project Management	5		
Financial Projections	5		
Training	5		
Risk Mitigating Strategies	5		
Financial Approach			
Funding Methods	5		
Operational and Financial KPIs	5		
Other Benefits			
Other Benefits	10		
Grand Total Score (Possible 100)			

