

EXHIBIT “A”
Requirements

REQUEST FOR QUALIFICATIONS (RFQ)

HIDALGO COUNTY

(Including all funding sources, programs, and entities)

***“PROGRAM MANAGEMENT SERVICES
FOR
NEW COUNTY COURTHOUSE”***

RFQ No.: 2016-267-00-00

County of Hidalgo will be accepting Statements of Qualifications (“SOQ”) from qualified firms for Program Management Services for New County Courthouse. Hidalgo County Purchasing Department will receive sealed Statements of Qualifications for the provision of **“Program Management Services for New County Courthouse”** (including all funding sources, Programs, and Entities)-**Request For Qualifications** as specified herein. Statements of Qualifications will be accepted until **9:30 A.M. , Wednesday, Month 00, 2016** ANY RFQ RECEIVED AFTER THAT TIME WILL NOT BE OPENED AND WILL BE RETURNED.

The following outlines the Request for Qualifications:

SECTION- I **GENERAL TERMS AND CONDITIONS**

RFQ DOCUMENT SUBMITTAL/DELIVERY:

A total of **one (1) original and three (3) copies and eight (8) CD’s in PDF format** of the RFQ shall be submitted as part of your response.

Respondents must complete and include in their responses, all documentation requested in this RFQ. Refer to enclosed RFQ Checklist form for documents to be included with your response.

Hidalgo County is requesting that statements of qualifications responses be sealed, clearly marked and/or labeled with the Company’s name, RFQ number 2016, Project Title, and Opening Date, and be delivered to Martha L. Salazar, CPPB, Purchasing Agent, at:

US Postal Mail Address:

Martha L. Salazar, CPPB, Purchasing Agent
Hidalgo County Purchasing Department
Administration Building
2812 S. Business Hwy 281
Edinburg, Texas 78539

Physical Address:

Martha L. Salazar, CPPB, Purchasing Agent
Hidalgo County Purchasing Department
Administration Building
2802 S. Business Hwy. 281
Edinburg, Texas 78539

Hidalgo County requires respondents, when hand delivering statements of qualifications, to have a Purchasing Department representative time/date stamp and initial the envelope when dropping RFQ off.

All costs and expenses associated with the preparation and submission of (RFQ’s, bids, proposals and/or quotes) shall be the responsibility of the respondent participant and no reimbursement for such charges or expenses shall be passed onto Hidalgo County.

PROPOSER’S AFFIDAVIT: Respondents to this RFQ must submit a signed Proposer’s Affidavit (attached herein in Exhibit E) certifying that the submission is (1) not the result of Collusion as described in the Proposer’s Affidavit, (2) that the Respondent does not have a Conflict of Interest as described in the Proposer’s Affidavit, or (3) that the Respondent has not and will not attempt to lobby directly or indirectly as described in the Proposer’s Affidavit.

NON-DISCRIMINATION: Respondents, during the performance of this contract, will not discriminate against any employee or applicant for employment because of race, religion, sex, national origin or disability except where religion, sex, national origin or disability is a bona fide occupational qualification reasonably necessary to the normal operation of the contractor.

PROCESSING TIME FOR PAYMENT: Respondents are advised that a minimum of thirty (30) days is required to process invoices for payment.

ELECTRONIC TRANSMISSION OF RFQ's: Hidalgo County's Purchasing Department will not accept telegraphic or electronically transmitted submissions.

PROOF OF FINANCIAL AND BUSINESS CAPABILITY: Respondents must, upon request, furnish satisfactory evidence of their ability to furnish products or services in accordance with the terms and conditions of these requirements. Hidalgo County will make the final determination as to the Respondent's ability.

RESPONDENT DEFAULT: Hidalgo County reserves the right, in case of Respondent default, to procure the articles or services from other sources and hold the defaulting respondent responsible for any excess costs occasioned thereby.

RESTRICTIVE OR AMBIGUOUS REQUIREMENTS: It is the responsibility of the respondent to review the Request for Qualifications (RFQ) packet and to notify in writing the Purchasing Department if the requirements are formulated in a manner that would unnecessarily restrict competition. These criteria also apply to requirements that are ambiguous.

RFQ QUESTIONS AND ANSWERS: Any protest(s) or question(s) regarding the requirements or request for qualifications procedures must be received in the Purchasing Department **via facsimile to (956)292-7612 or via e-mail to rocio.villarreal@co.hidalgo.tx.us BY NO LATER THAN [REDACTED], 2016 at 5:00 p.m.** Responses will be sent to all applicants by **[REDACTED], 2016.** **TELEPHONE INQUIRIES WILL NOT BE ACCEPTED.**

SIGNING OF QUALIFICATIONS: In order to be considered, all submittals **must** be signed. **Please sign the original in blue ink.**

WAIVING OF INFORMALITIES: Hidalgo County reserves the right to waive minor informalities or technicalities when it is in the best interest of Hidalgo County.

SUBCONTRACTING: The successful Respondent may not subcontract the award without the written consent of the Commissioners' Court of Hidalgo County.

DAVIS BACON ACT: Program Manager (PM) when required by County will be responsible to monitor and enforce the minimum wage provisions of the Davis Bacon Act and the various statutes dealing with funding for construction that contain similar minimum wage provisions.

SECTION-II

RFQ REQUIREMENTS

REQUEST FOR QUALIFICATIONS: The required contents and limitations for the preparation of the SOQ, as well as the anticipated Scope of Services are described in this section. Failure to provide the requested information or adhere to any County limitations may result in disqualification of the submitted SOQ. The participating firm(s) should provide proof that their insurance programs meet the requirements of Exhibit C.

UNDERSTANDING OF THE PROJECT: This section of the SOQ should demonstrate the Respondent's understanding of the Project needs, the services required, and any local issues or concerns.

The development of a project such as the Courthouse Project is an uncommon occurrence for the County. Accordingly, the County does not employ fulltime professionals or staff necessary to provide the County's program management necessary for a development of this scale. The overall objective is to provide Program Manager ("PM") services encompassing planning support, community outreach, design management, construction project management, field inspection services, warranty management and asset preservation, project controls, administration and compliance monitoring of funds or other related services for the Project. It is imperative that the implementation of the Project be completed on schedule and within budget. The selected firm and its key personnel must have PM experience in the management and execution of similar major, public, capital improvement that involve construction. It is not necessary that the experience be courthouse specific, but such experience is relevant. Accordingly, the SOQ should list any relevant experience as a program manager on a courthouse project in any state within the past ten years including the name of the key personnel on such projects and whether such persons are still with your firm.

This description should be concise, candid and limited to 3 pages in length.

FIRM QUALIFICATIONS: This section of the SOQ should address how the selected PM will act as County's advocate and represent the County in managing the Project development process.

The successful respondent must demonstrate a highly qualified ability to accomplish the objectives of this RFQ. Additionally, the successful Respondent must demonstrate a deep understanding of strategies to achieve a high-performing building development process and physical building that shall be accomplished within the Project budget

The PM must be experienced in and capable of providing the following services generally described below and in the Scope of Services. The County may in its discretion choose not to procure some portions the following or Scope of Services and may request other services not listed below.

SUMMARY OF SCOPE OF REQUIRED SERVICES:

- a) *Management of Design Phase:* The PM shall be responsible for providing project management of the remaining portions of the design phase and support the development of scopes of construction work to be included in design review and construction packages.
- b) *Management of Overall Task Sequencing:* The PM shall be responsible for developing of a Gantt chart or similar device with sufficient detail to establish the overall sequence of Project elements and timing for completion of each element and the overall Project
- c) *Management of Construction Phase:* The PM shall be responsible for providing project management of the construction phase.
- d) *Field Inspection Services:* The PM shall be responsible for providing field inspection services as necessary

to ensure compliance to schedule, budget, quality and other CMAR contractual requirements.

- e) *Project Controls*: The PM shall be responsible for coordinating with the appropriate persons to manage the processing of schedules, design deliverables tracking and distribution, invoices, contracts, change orders, amendments and other controls to develop systems that result in the delivery of work and services on time and in budget.
- f) *Project Close Out*: The PM shall be responsible for assisting in the preparation of documentation for close-out. Close-out includes the set-up of preventive maintenance programs, management of warranties and asset preservation for each project executed. The PM shall be responsible for all necessary financial reports.
- g) *Temporary Facilities*: The PM may be responsible for management of temporary locations as needed for swing space.

Phases of Activities

The PM is expected to provide PM services during the following phases of the Project:

- a. Design Development Phase
- b. Construction Document Phase
- c. GMP and Procurement Phase
- d. Construction Phase
- e. Commissioning and Activation Phase
- f. Contract Closeout Phase

Additionally, this section should include a description of the firm's project personnel and their most recent (and varied) projects. For each project, a client contact name and phone number should be included for reference purposes. Additionally, the names of the personnel proposed for this project who participated in the listed projects should be provided. This project list is limited to 5 pages.

PERSONNEL AND STAFFING: The SOQ should provide an organizational chart for the proposed Project personnel and a summary paragraph of the Project services to be performed by each proposed staff member. Biographic summaries that highlight the experience relevant to the specific Project responsibilities should be provided for all proposed personnel. A statement should also be included about such personnel's education, training and experience related to the services to be provided. There is a one (1) page limitation for each biographic summary provided.

ADDITIONAL INFORMATION REQUIRED

Additionally, the SOQ should include, but not limited to the following information:

- a. Firm name, address, phone number and person to contact regarding the SOQ;
- b. Qualifications and recent experience of the firm and key personnel relative to the performance of similar services, especially those for public governmental entities. This should also include the following information:
 - Evidence of achievements acquired by PM staff;
 - Representative PM experience relevant to the Project;
 - list any relevant experience as a program manager on a courthouse project in any state within the past ten year including the name of the key personnel on such projects and whether such persons are still with your firm.

- List of references including the name, address and phone number of the person most closely associated with the firm's prior project performance;
- Statement of the ability to commence services immediately after successfully negotiating a contract for services;
- Familiarity with and experience in the geographical area of the Project; and
- Statement regarding achievement of HUB or MBE/WBE goals.

PARTICIPATING FIRMS ARE NOT TO PROVIDE A FEE PROPOSAL

The fee will be negotiated in accordance with the Professional Services. Procurement Act, Tex. Govt. Code Arm. 2254.001, et seq. Once selected, proposer is to provide a fee proposal based on the scope of work.

PROJECT DESCRIPTION AND SCOPE OF SERVICES

1) GENERAL PROJECT DESCRIPTION

The County of Hidalgo, Texas (“County”) is developing a replacement courthouse (“Project”). It is anticipated that the Project building will include approximately 400,000 to 500,000 square feet, 24 courtrooms, District and County Clerks’ offices, and other offices and room for expansion.

A proposal was submitted in response to an RFQ from a design team comprised of EROS/HDR/Half and Balfour Beatty, which contained a schematic design. A copy is attached for information about the Project parameters, **Exhibit ____**. Subsequently, a team led by HOK prepared a peer review and suggested an alternative design, which is also attached, **Exhibit ____**. These documents provide the basic characteristics of the facility being developed, which is now at the Schematic Design Phase level and apparently ready to be taken to the Design Development Phase level upon architect selection. The Architect of record has not been selected.

2) SCOPE OF SERVICES:

This RFQ is intended to obtain PM services in accordance with all applicable law pertaining to the procurement of professional services and the requirements of this RFQ. The Respondent should recommend any tasks and services it thinks advisable in addition to those described below and any services it considers inefficient and unnecessary for this Project.

2.1 Responsibilities and Deliverables

The PM’s Responsibilities and Deliverables for the Project may include, but are not limited to, the following.

2.1.1. Responsibilities:

- Provide personnel and managers to which the County has no reasonable objection who have the education, training and experience to carry out the scope of services required for a successful project.
- Develop a Program Management Plan with County input that defines Project requirements and goals. This document should provide guidelines for the Project stakeholders’ activities and provide, without limitation, strategies for accomplishing such requirements and goals.
- Develop media and PR documents, websites and events under the direction of Commissioners Court’s authorized representative.
- Develop project controls for managing the development of the Project on behalf of the County, which shall include, without limitation, controls for construction and other documents, financial matters, quality and inspections, administration of contracts, compliance monitoring and close-out.
- Develop a master schedule that is continuously updated and coordinated with professionals’, CMAR’s and subcontractors’ schedules, submittal schedules, inspection schedules, permit

- schedules, and occupancy schedules. Provide recommendations for schedule modifications to complete the Project on time and factors to consider in making any modifications. Recommend recovery actions and solutions on a timely basis to ensure appropriate corrective decisions are made.
- f. Assist with Project budget development. Develop master budgeting tools and controls. Obtain and monitor design-to-budget estimates for each design review issuance and bid package. Provide recommendations for modifications to complete the Project within budget and factors to consider in making any modifications. Recommend recovery actions and solutions on a timely basis to ensure appropriate corrective decisions are made.
 - g. Monitor professional services and administer their contracts with the County to ensure delivery for periodic reviews within the established schedule and cost parameters and in compliance with quality assurance requirements. . Consult and advise on construction cost versus long term maintenance cost choices as the design develops. Provide timely professional service communications. Develop and implement appropriate recovery strategies when management objectives are at risk
 - h. Develop and implement strategies to implement and maximize the value of Construction Manager at Risk (“CMAR”) Project delivery, possibly including fast-track delivery techniques and multiple construction document packages, which would enhance the building program goals of high quality buildings delivered on time and within budget.
 - i. Assist the County in providing regular reports to Commissioners Court, County officials and personnel, the City Council of Edinburg and other stakeholders and in administering and facilitating agreements between the County, the City Council of Edinburg and other stakeholders.
 - j. Assist the County as required in program financial or programmatic audits.
 - k. Evaluate and review any design errors and omissions that breach the applicable professional standard of care, rendering professional opinions to County and assisting County in recovery efforts if necessary.
 - l. Monitor during design and construction compliance with all federal, state and local applicable environmental requirements, standards, building and accessibility codes, ordinances, flood and drainage requirements and regulatory requirements.
 - m. Manage the submittal and obtaining all required documents for approval by Federal, State, County, City, and flood district and other governmental agencies having jurisdiction over the Project.
 - n. Provide document quality assurance/quality control reviews.
 - o. Verify that all addenda have been incorporated into the final plan set prior to start of construction.
 - p. Organize and conduct a pre-construction conference. The agenda will cover, without limitation, site organization, communications, coordination, correspondence, submittals, meetings, requisitions, change orders and schedule. The conference will include all project stakeholders including the County representatives, the architect and consultants and the CMAR.
 - q. Monitor and assist in construction document dissemination.
 - r. Support and assist CMAR in the construction program procurement plan and schedule.
 - s. Provide a full-time site representative for inspections and other activities.
 - t. Provide project management of construction activities. Conduct and lead regular jobsite meetings, oversee quality assurance testing and inspection programs and monitor contractor and subcontractor work for deficiencies. Maintain copies of all contract documents, RFI’s, ASI’s, submittals, change orders, pay applications, and other documentation. Monitor contractor and subcontractor safety programs. Monitor communication, processing and documentation of same.
 - u. Report potential budget and schedule variances and monitor implementation of recovery

- plans to achieve on-time Project completion.
- v. Monitor and inform the County of Project cash flow.
 - w. Ensure that all contract drawings, terms and conditions are adhered to during the construction phase.
 - x. Validate accuracy and supporting documentation of pay applications of architect and other consultants such as testing firms.
 - y. Monitor CMAR work quality and compliance with the terms of the contract and the quality level expected for the Project in a manner coordinated with on-site activities of the design professionals. Quality Control encompasses all phases of the work, such as approval of submittals, procurement, storage of materials and equipment, coordination of subcontractor's activities, and the inspections and tests required to be sure that specified materials are used and installation is acceptable to produce the required end product. Work with architects to assist in monitoring the quality of the work being performed and ensure the CMAR maintains the quality expected as well provide any corrective action required for any identified deficiencies. Monitor the activities of all testing inspection consultants, inclusive of testing laboratories, factory testing and on-site testing. Develop monitoring and tracking procedures to be followed by all testing inspection consultants. **The PM shall not interfere with or take on any control over any construction means, methods, sequences, techniques or safety programs of CMAR or its subcontractors or suppliers.**
 - z. Participate in and make recommendations on the issuance of the certificates of substantial completion and conduct final inspections with County personnel.
 - aa. Participate in and make recommendations on the issuance of the certificate of final completion.
 - bb. Ensure that the efforts of County departments are coordinated with the on-site CMAR activities.
 - cc. Manage and facilitate the implementation of all commissioning processes and guidelines throughout the Project duration.
 - dd. Assist in coordinating furnishings, fixtures and equipment installation as requested by the County and Project move-in.
 - ee. Administer post construction close-out, start-up, and transition to operation including ensuring receipt of all operations and maintenance manuals, warranties and as-built drawings.
 - ff. Expedite final Project close out and approval for final payment to CMAR and assist in all post construction dispute resolution as necessary.
 - gg. The County may require commissioning services for some building systems to be determined such as HVAC and any LEED certification.

2.1.2. ***Deliverables (including, without limitation)***

- a. Organizational chart for managers and key County and PM staff of the Project with biographical information of all PM personnel and managers.
- b. Program Management Plan.
- c. Task sequencing plan.
- d. Project Controls.
- e. Master Schedule.
- f. Master budgeting tool and controls.
- g. Cost estimating documents and controls.
- h. All reports, charts and controls generated in performance of Project Responsibilities.
- i. Full-time site representative.
- j. Regular reports on Project's progress including, but not limited to, Project cost, schedule, cash flow projections, change orders and work status.
- k. Project controls, performance and management metrics and related reports to assure all

- activities proceed on schedule, within scope, within budget and at quality levels agreed to.
- l. Within 30 days of contract award, submit a contractor outreach and public communication plan that encourages participation of MWBE involvement throughout the services assigned to the PM and periodic reports on reaching goals.
 - m. Check-list for each design submittal to ensure that the County has considered all applicable issues and the most current information is delivered to CMAR.
 - n. Document issuance controls.
 - o. Daily project field reports of all the details of the work including, without limitation, weather, manpower, CMAR equipment, material and equipment deliveries, general description of work being performed, presence of design professional perform contract administration duties, assessments of quality and workmanship and location Issues and areas of concern or critical to job progress in both electronic and hard copy forms.
 - p. Project progress photos.
 - q. Reports on completion of CMAR's punch-lists and substantial completion inspections.
 - r. Recommendations, reports and documentation on any change orders and claims by the CMAR or its subcontractors
 - s. Delivery of all as-built drawings, warranties and Project service documentation to County for record keeping purposes.

3) **CMAR PAY APPLICATION PROCESSING**

The PM will develop and implement a two-step process for the review and approval of monthly CMAR payment applications and will process the final application for payment.

- 3.1. During the final week of each month, PM will conduct a payment application review meeting to include architect and CMAR for the purpose of reviewing a draft of the monthly payment application. Each line item will be reviewed and either accepted or noted for changes.
 - 3.2. A second meeting will be held with the contractor to review the corrected payment application. If acceptable, PM will recommend approval to the architect and County. If changes need to occur, PM will work with the CMAR to get all changes made as soon as possible for acceptance.
 - 3.3. PM, with input from architect, will review the final payment request upon successful completion of all closeout items, including final punch list, all permits, substantial completion certificate(s), and resolution of any open claims. Once PM, together with the architect, is satisfied that all contractual obligations have been met will recommend approval and submit to the County the final pay request.
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SECTION-III

SELECTION / EVALUATION

SELECTION/EVALUATION PROCESS:

The respondent's SOQ will be evaluated based on the criteria presented below. These criteria will be scored on the scales shown on the enclosed "RFQ Evaluation Form." The evaluation system consists of a 105-point system.

1) Professional Qualifications **(25 Points)**

The Respondent must demonstrate a highly qualified ability to accomplish the objectives of this RFQ and a deep understanding of strategies to achieve a high-performing building development processes and physical building that shall be accomplished within the Project budget and schedule. The Respondent must demonstrate that it is experienced in and capable of providing the services described in the Scope of Services.

The Respondent must demonstrate its qualifications and experience in providing the types of services that will be required:

- a. *Management of Design Phase:* The PM shall be responsible for providing project management of the remaining portions of the design phase and support the development of scopes of construction work to be included in design review and construction packages.
- b. *Management of Overall Task Sequencing:* The PM shall be responsible for developing of a Gantt chart or similar device with sufficient detail to establish the overall sequence of Project elements and timing for completion of each element and the overall Project
- c. *Management of Construction Phase:* The PM shall be responsible for providing project management of the construction phase.
- d. *Field Inspection Services:* The PM shall be responsible for providing field inspection services as necessary to ensure compliance to schedule, budget, quality and other CMAR contractual requirements.
- e. *Project Controls:* The PM shall be responsible for coordinating with the appropriate persons to manage the processing of schedules, design deliverables and distribution, invoices, contracts, change orders, amendments and other controls to develop systems that result in the delivery of work and services on time and in budget.
- f. *Project Close Out:* The PM shall be responsible for assisting in the preparation of documentation for close-out. Close-out includes the set-up of preventive maintenance programs, management of warranties and asset preservation for each project executed. The PM shall be responsible for all necessary financial reports.
- g. *Temporary Facilities:* The PM may be responsible for management of temporary locations as needed for swing space.

2) Experience of Project Team and Ability to Commit Resources (25 Points)

The Respondent must demonstrate that its key personnel that would be assigned to the Project are well qualified by education, training and applicable experience to competently carry out the goals and requirements stated in the RFQ.

The Respondent must provide an organizational chart for the proposed Project team and a summary paragraph of the Project services each would perform. The Respondent must designate experienced technical staff to completely and efficiently perform the Services, either through their own personnel or consultants. The Response must identify the Project team composition, Project leadership, reporting responsibilities and address how consultants would fit into the team structure. Biographical summaries that highlight the experience relevant to the specific Project responsibilities should be provided for all proposed personnel. A statement should also be included about such personnel's education, training and experience related to the services to be provided. There is a one (1) page limitation for each biographical summary provided.

The Respondent must provide assurances of how its qualified team members would be committed to this Project, full- or part-time. Such information should also describe other of Respondent's resources that would be available and committed.

3) Relevant Experience (20 Points)

The Respondent must have adequate experience as PM for varied projects of a similar nature and scope and shall be registered to do business in the State of Texas. Scope of relative projects must be included as well. Any relevant experience as a program manager on a courthouse project in any state within the past ten years is relevant

In the following criteria for minimum and preferred qualifications and experience need not consist of continuous work but may be made up of discontinuous periods of full-time services with cumulatively equivalent years of experience.

- Minimum Qualifications - The Respondent must have been PM for two (2) different types of projects and must have been personally involved with 50% of the technical development of the projects;
- Preferred Qualifications - The Respondent must have been PM for five (5) different types of projects and must have been 85-100% involved with the technical development of the projects.

4) Understanding of the Project (20 Points)

The SOQ shall:

- Demonstrate an understanding of the Scope of Services
- Identify information to be gathered or obtained
- SOQ clearly demonstrates an understanding of this Project

The SOQ shall be clear, well organized, easy to evaluate and appropriate to this RFQ.

- Minimum Qualifications - The SOQ must address knowledge and experience of working with multiple entities, such as counties, cities, etc.
- Preferred Qualifications - The SOQ must address the proposed approach to complete the Scope of Services and identify information to be gathered or obtained and how it would be used in addition to the minimum qualifications.

5) Familiarity With Applicable Rules and Regulations (10 Points)

The SOQ must indicate through past experience of the proposed team that they possess sufficient knowledge of governmental regulations, appropriate codes, guidelines, professional standards and policies (as required).

- Minimum Qualifications - The SOQ must contain a narrative that outlines applicable regulations, guidelines, standards and policies.
- Preferred Qualifications - Suitable examples of previous projects completed in the area by the PM in addition to the minimum qualifications.

6) Location of Principal Firm Office (5 Points)

Local presence of your business is of importance to County. Indicate your principal office location/address.

NEGOTIATION PROCESS:

Negotiations will commence with Commissioners Court's approved number one ranked firm.

1. The number one ranked firm will be asked to submit (as part of those negotiations) a definitive "Scope of Service" including proposed fees and expenses.
2. The negotiated contract including best and final offer with the successful firm will be presented to Commissioners' Court (including respondent's confirmation of compliance with all requirements including, without limitation, insurance requirements) for consideration and final approval.

If negotiations with the number one ranked firm fail, the Purchasing Department will recommend to Commissioners' Court that negotiations cease with the number one ranked firm and commence with the next highest ranked firm.