Statement of Qualifications Deadline:

Wednesday, January 5, 2022 prior to 1:00 P.M.

TO: **Design-Build Engineers**

FROM: **Alica M. Holthaus, Superintendent, St. Maries Joint School District #41**

SUBJECT: **Design-Build Qualifications for St. Maries High School HVAC Replacement**

Submittals will be received at St. Maries Joint School District #41 office at 240 S. 11th Street, St. Maries, ID 83861 until Wednesday, January 5, 2022 at 1:00 P.M., for furnishing integrated design-build services to St. Maries Joint School District #41.

The proposed project requires Professional Engineering and Construction experience in Project Management, Construction Management, Mechanical Design, Energy Engineering, Commissioning, and Measurement & Verification (M&V).

Questions that arise as a result of this SOQ should be addressed to:

Alica M. Holthaus, Superintendent
St. Maries Joint School District #41
240 S. 11th Street
St. Maries, ID 83861
208-245-2579
aholthaus@sd41.org

Program clarification and additional data may be requested by official Request for Information (RFI) only. Any RFI and/or responses, will be shared with all known respondents. Superintendent Alica Holthaus will also be responsible for overall Project Management of the SOQ process on behalf of St. Maries Joint School District #41.

The project will be funded by the School District Capital with the potential for outside financing, and will be administered according to State laws and guidelines.

St. Maries Joint School District #41 is an equal opportunity employer. All submittals become the property of St. Maries Joint School District #41.

Project services required under this SOQ are procured under the State of Idaho Statute, Section 67-2309, and as defined in enabling legislation.

This Statement of Qualifications (SOQ) is the first step in a two-step proposal process for the selection of an integrated design-builder for the project. The SOQ will be evaluated by the St. Maries Joint School District #41 Evaluation Committee, and scoring will be in accordance with the terms of this SOQ. The evaluation process is intended to identify those Proposers who, in the opinion of the Owner, are best qualified to execute successfully the design and subsequent construction of the Project based on the criteria identified in this SOQ.

One Finalists will be invited to proceed to the second step of the procurement process, which will include preparing a detailed Proposal requiring the submission of a sustainable design solution, construction schedule, proposed Guaranteed Maximum Price (GMP), and other supporting data, including life cycle costs, energy savings and costs.

1.0 Questions and Clarifications

All questions and requests for clarification regarding this SOQ shall be submitted to St. Maries Joint School District #41 electronically to the Point of Contact. No requests for additional information, clarification or any other communication should be directed to any other individual. If individuals other than the main contact are contacted, St. Maries Joint School District #41 will disqualify respondent.

The deadline for submission of a question or request for clarification will be 9:00 a.m., PST, Monday, January 3, 2022. Questions or clarifications requested after such time will not be answered, unless St. Maries Joint School District elects, in its sole discretion, to do so.

St. Maries Joint School District #41's responses to questions or requests for clarification shall be in writing, and will be accomplished by an Addendum to this SOQ. St. Maries Joint School District #41 will not be bound by any oral communications, or written interpretations or clarifications that are not set forth in an Addendum.

St. Maries Joint School District #41, at its sole discretion, shall have the right to seek clarifications from any Proposer to fully understand information contained in the SOQ necessary to help evaluate and rank the Proposers.

2.0 Introduction

St. Maries Joint School District #41 is soliciting a Statement of Qualification (SOQ) from qualified contractors interested in providing Energy Engineering and Design-Build services for St. Maries Joint School District #41 in St. Maries, Idaho.

REQUIRED SERVICES

The Primary goal of this project is to replace the heating system at St. Maries High School. This replacement allow St. Maries Joint School District #41 to take advantage of energy savings, utility incentive, and project financing if needed.

The project requires experience with the following:

- Heating and Air Conditioning Systems
- Controls and Programming
- Engineering design of Mechanical, Electrical and Plumbing Systems
- Calculations of utility savings, identification of utility incentives and any operational savings associated with improvements needed
- Ability to provide an energy performance guarantee
- Ability to provide guaranteed maximum costs
- Ability to provide open-book pricing structures and transparency

The successful proposer must provide the following:

a. Local In-House Project Development, Energy Engineer and Design Professionals
b. Regional Design-Build team with proven track record for energy based retrofits.
c. Responding party shall demonstrate operation and management best practices for transitioning projects to clients.
d. Demonstrate capabilities and experience delivering for integrated Design-Build services.
e. The Contractor shall be licensed to practice engineering in the State of Idaho.
f. Submit a minimum of five (5) references from prior clients with similar projects.
g. Provide a list of at least five (5) Energy Saving projects with performance guarantees for integrated Design-Build or Energy Services Performance Contract (ESCO) projects valued at one million ($1,000,000.00) or greater, with brief descriptions that show ability to complete projects of this scope.
h. A minimum of three of these projects should be in the last twelve months demonstrating energy guarantees and Measurement & Verification (M&V) plans.
i. Provide certificates of insurance for all contractors showing workman's compensation, liability, etc. naming St Maries Joint School District #41 as additionally insured.

Keeping Team Intact

The team proposed by Proposer, including but not limited to the Project Director, the designer-of-record, key personnel, and other individuals identified shall remain on Proposer's team to the extent possible for the duration of the procurement process and, if the Proposer is awarded the design-build contract, the duration of the design-build contract.

3.0 Proposal Content

3.1 Basic Qualifications

Provide basic data relative to firm's size, history, local/regional personnel, proven energy projects expertise, local Design-Build teams and offices, and general credits. Individual resumes, awards, associations, etc. may be included. Specifically identify the contracting firm's makeup as to sole proprietorship, partnership, Professional Corporation and any relationships that include joint ventures, associations, or other special or unique relationships. Indicate if the firm is a subsidiary of any other firm or if the firm or principles operate or participate in other professional firms. List level of LEED certification achieved if any, e.g. Silver.

St. Maries Joint School District #41 reserves the right to investigate and confirm the proposer's financial responsibility. This may include financial statements, client and bank references, and interviews with

past clients and creditors. Unfavorable responses to these investigations are grounds for rejection of proposal.

Specific Qualifications:

List Contractor local team expected to accomplish this work including anticipated consultants. Describe who will perform the various tasks and responsibilities, the amount of their involvement and responsibilities during the life-cycle of the project, including both design and build phases, if Contractor is chosen for Phase 2. Provide qualifications for each. Include at minimum:

a. Design-Build Project Director – The individual primary responsible for the overall project design, construction quality management, contract administration and primary Point of Contact ("PoC").
b. Lead Design Engineer.
c. Specialty and Engineering consultant leaders, including those responsible for design and construction of building electrical and mechanical systems.
d. Project Management and Site Superintendent – The individuals responsible for planning and executing day-to-day preconstruction and construction activities.
e. Energy performance and M&V specialist(s).
f. Other key designer and staff members.

3.2 Approach to Project:

Describe your overall approach to delivering projects, maximizing the value of the design-build delivery and building a highly collaborative and effective project team, including:

a. Your design process and how you will work with St. Maries Joint School District #41.
b. Your approach to addressing the detailed needs of St. Maries Joint School District #41.
c. How you engage with building users.
d. Your high-performance design approach that demonstrates low life cycle costs and balances the constraints of limited first cost funding.
e. Your approach to overall project management that promotes effective decision making, effective communications, risk and safety management, insurance coverage, quality management, and predictable outcomes.
f. Your approach to overall quality control, including day-to-day review, reporting and follow up to assure quality construction.
g. Your approach to project safety. It is important that responding firm has a documented safety program and monitors it continuously for the safety of its employees and the safety of the St. Maries Joint School District #41.
h. Your recommendations regarding building commissioning and Measurement and Verification (M&V) of building performance.

Your approach and recommendations to:

a. Achieving the proposed energy, life-cycle and energy use index goals (EUI).
b. The transition to operations of a building during the first year of occupancy after the project is complete.

3.3 Special Requirements

Provide information regarding specific involvement with this project or special expertise in this type of project within the last 2 years. Highlight any lifecycle cost estimating, life-cycle operating reductions, benchmarking against Energy Star ratings, and energy efficiency measures. Examples are:

- Preliminary studies with potential energy savings and successful experience with both Design and Build and with energy savings for similar buildings to St. Maries High School.

3.4 Format

To assist evaluation, it is desirable to format Contractor's proposal similar to the headings listed above. The proposal should be clear and to the point and provide no more than ten (10) pages (front and back). Emphasis should be placed on specific qualifications of the people who actually perform the project and the approach to designing this specific project. Performance on past projects is a highly important factor. In Contractors Cover Letter, include the email address of the team's primary contact person.

4.0 Evaluation

An evaluation committee consisting of persons from St. Maries Joint School District #41 will rank the proposals. St. Maries Joint School District #41 reserves the right to request a formal interview of respondents prior to final award.

The evaluation committee will rank the proposals to determine the finalist. Responsiveness to the requirements of the SOQ will be evaluated according to the following criteria and weightings:

- Proposed Team 30 pts
- Relevant Experience 40 pts
- Project Approach 30 pts
- Proposers who are not selected as Finalists will be eliminated from further participation in the procurement process.

5.0 Award

Based on the results of the above, St. Maries Joint School District #41 will determine schedule with the approved finalist. Preliminary schedule of milestones includes:

- Design-Build Contractor Agreement Negotiation and Coordination
- St. Maries Joint School District #41 and Contractor Selection meeting – to include Project Proposal and Schedule
- Project Proposal presentation
- Final Proposal Approval
- Design and Construction Schedule and Documentation

- St. Maries Joint School District #41 reserves the right to reject any or all proposals as a result of this project.