



Request for Qualifications for Program Management Services

RFQ Issue	October 20, 2025
Deadline for Questions	October 28, 2025
Addendum if applicable	October 31, 2025
Qualifications Due	November 6, 2025

NOTICE OF RFQ

Orange County Schools (OCS) is seeking Statements of Qualifications (SOQ) from qualified firms to perform planning, program management, and/or project/construction management services to manage the 2024 School Bond. Services may include program management, construction management, and augmenting OCS staff as needed to support these functions. The selected firm will assist in the delivery of projects funded through the 2024 Orange County Bond referendum. The first project will be the delivery of a new elementary school. Design will begin in January 2026; occupancy of the school will begin August of 2029.

OVERVIEW OF ORANGE COUNTY SCHOOLS

Orange County School's Mission is to Engage, Challenge, and Inspire every student in a safe and inclusive learning environment. OCS serves approximately 7,000 students across thirteen schools—three high schools, three middle schools, and seven elementary schools—in Orange County and the Town of Hillsborough. The 2024 School Bond provides funding for Orange County Schools and the Chapel Hill-Carrboro School districts. OCS will use their allocation to develop a new elementary school and perform capital improvements across the portfolio over the next ten years.

GENERAL INSTRUCTIONS

Proposals must be clear, concise, complete, and well organized and demonstrate respondents' qualifications and ability to follow instructions. The quality of answers, not the length of responses or visual exhibits, is essential in the proposal. The submission of company literature and brochures is generally discouraged. Responses should otherwise be submitted in print and must be limited to the maximum number of pages indicated.

Q&A – Questions regarding this RFQ should be submitted by email no later than October 28, 2025, to della.putney@orange.k12.nc.us

If applicable, an Addendum with a summary Q&A will be posted to the County website by October 31, 2025 at the following link: <https://www.orangecountyfirst.com/our-district-main/operations-facilities/bids-requests-for-proposals-and-quotes>

Proposals must be clear, concise, and complete. Submit three (3) bound copies, and one (1) PDF copy via email to:

Orange County Schools

Attn: Della Putney

123 East Oakdale Drive, Hillsborough, NC 27278

Email: della.putney@orange.k12.nc.us

Submissions must be received by 2:00 PM on November 6, 2025.

The Non-Collusion Affidavit attached to this RFQ must be included.

Signatures - An authorized representative or officer of the firm must sign proposals.

All submittals received after the noted deadline will not be considered.

DESCRIPTION OF SERVICES REQUIRED

The selected firm shall manage the following categories of work:

Program Management

- Work with the County on overall scheduling, budgets, and communication for all capital projects; report to the County on program and individual project status regularly.
- Prioritize sequence of construction projects
- Verify and update cost estimates
- Development of the timing of construction projects
- Create a project communication plan that includes project participants, administration, school site personnel

Project and Construction Management

- **Project Planning**
 - Project planning, due diligence and entitlement management.
 - Manage the selection of development team partners
 - Surveyor
 - CMT & Geotechnical Services
 - Environmental Engineering
 - Architectural and Engineering
 - Construction
 - Furniture
 - Low Voltage Systems
- Advise the Board of Education in selecting construction delivery methods

- **Design Phase**
 - Work with OCS staff and architects to develop and refine designs to correlate design and scope to project budget
 - Assist with verification of site conditions
 - Perform constructability reviews at appropriate stages of design
 - Assist in segregating bid packages for maximum cost-effectiveness
 - Coordinate procurement of owner-supplied equipment and services
 - Report to OCS staff and Board of Education on the status of design and state and local agency approvals versus the approved schedule
 - Assist in obtaining all necessary approvals
- **Pre-Construction & Bidding Phase**
 - Work with the project team to develop and monitor project budgets
 - Manage pre-bid conferences and pre-construction meetings
 - Manage the bidding process and reporting to OCS staff of results
 - Coordinate contracts with selected contractors.
- **Construction Phase**
 - Work with the project team to develop and monitor project budgets
 - Monitor construction
 - Monitor budget and project schedule
 - Proactively work to mitigate risks to costs, quality and schedule
 - Ensure project is working collaboratively
 - Timely & professionally written RFIs and responses
 - Manage submittals to the critical path schedule
 - Attend project meetings
 - Ensure Contractor keeps daily logs, meeting minutes and monthly reports
 - Evaluate pay applications and change order requests
 - Ensure project team proactively prepares for, and executes project closeout
 - Ongoing Field Reports to address deficiencies
 - Assembling warranty and owner manuals
 - Certificate of Occupancy inspection matrix
 - Contractor pre-punch list
 - Designer punch list

- **Post -Construction Phase**
 - Work with the project team to ensure completion of all punch list work
 - Work with design team to manage contractor closeout requirements
 - Warranties
 - As-Built Drawings
 - Project Logs
 - Coordinate owner and end-user training
 - Coordinate prime vendors
 - Furniture
 - Audio-visual
 - Low voltage systems

STATEMENT OF QUALIFICATIONS

Submittal Letter

The cover letter shall be brief (two pages maximum). Include the SOQs title and submittal due date, the name, address, and telephone number of the responding firm (or firms if there is a joint venture or association). If the firm is proposing to co-respond with another principal firm, the cover letter must specify the type of services to be provided by each firm and the proposed percentage allocated to that phase or function for the co-respondent. The submittal letter will NOT be considered part of the twenty-five (25) page limit.

Table of Contents

Include complete and clear listings of headings and pages to allow easy reference to key information. The table of contents will NOT be considered part of the twenty-five-page limit.

Description of the Firm

Provide information about the size of your firm, key team members, years in business, and the approach that will be used to address the needs of OCS. If the firm is proposing to team with another firm, provide information for both firms, as well as key managers for each firm and an organization chart showing roles, responsibilities, and proportional shares for each firm.

Project Team/Background

Name the key personnel assigned to the County for each phase of the work and their respective roles. In addition, show the experience each member of your professional team and support staff to be assigned to the County has in working on (K-12) capital facility programs.

References

Provide three references for each team member, including company, role, project name, description, size, cost and year of completion.

Proposed Capabilities and Processes

Describe the tools your team will use for scheduling, budgeting, cost control, document control. Provide a project plan to manage

- due diligence
- entitlements
- permitting
- offsite improvements
- design management
- cost control
- contractor selection
- project buyout
- quality control
- project schedule
- closeout

Legal Issues

Please respond to each of the following questions:

- Is there any legal action pending against your firm by a public agency related to services, or lack thereof, provided by your firm?
- Have there been any settlements or judgments involving such actions within the last ten (10) years? Please describe each settlement or judgment, including the action's nature and the recovery amount.
- Within the past ten (10) years, has your firm ever had a consulting agreement terminated by a client? If yes, please identify the name of the client and the reason for the termination.

Insurance

The Vendor shall obtain and maintain in effect during the term of this Agreement, general liability and automobile liability insurance in which the School System and the Vendor shall each be named as insured parties in an amount not less than \$1,000,000, with a \$2,000,000 aggregate, for personal injury, including death, to any one person, and from claims for property damages in an amount of not less than \$1,000,000 for each occurrence arising from any act or omission of Vendor, its agents, employees or subcontractors. The Vendor shall obtain and keep in effect during the term of this Agreement a policy or policies of workers' compensation insurance which shall cover all of Vendor's employees and all individuals who enter onto School System property on behalf of Vendor pursuant to this Agreement. The Vendor shall

promptly furnish the School System certificates of insurance evidencing such insurance coverage. Insurance required by this section shall contain an endorsement to provide the School System with at least 10-day's written notice of any intent to cancel or terminate by either the Contractor or insurance company. Vendor's Worker's Compensation policy shall contain an endorsement waiving subrogation against School System. All such insurance policies shall be provided by insurance companies properly licensed in North Carolina and having a financial rating of at least "A" by A.M. Best or equivalent. Failure to furnish insurance certificates or maintain such insurance shall be a default under this contract and shall be grounds for immediate termination of the Contract.

EVALUATION CRITERIA

Proposals will be evaluated by a committee of Orange County Schools staff using the following weighted criteria:

- | | |
|---|-----------|
| • Understanding of OCS needs and responsiveness to this RFQ | 30 points |
| • Relevant experience in K-12 program/construction management | 20 points |
| • Qualifications and experience of key personnel | 20 points |
| • Technical approach and project methodology | 20 points |
| • References and past performance | 10 points |

LEGAL AND COMPLIANCE REQUIREMENTS

All firms must comply with applicable North Carolina laws and Orange County Schools policies. This includes maintaining valid business licenses, liability insurance (minimum \$1,000,000 coverage), and adherence to background screening requirements for all on-site personnel. OCS is an equal opportunity employer and encourages participation by minority- and women-owned business enterprises (MWBE).

DEADLINES AND ADDENDA

Questions about this RFQ must be submitted via email to Della Putney by October 28, 2025. Responses and any addenda will be posted on the Orange County Schools website at <https://www.orangecountyfirst.com/our-district-main/operations-facilities/bids-requests-for-proposals-and-quotes>

CLOSING STATEMENT

OCS thanks all interested firms for their consideration. The County looks forward to selecting a qualified partner to help manage and deliver high-quality learning environments for the students and staff of Orange County.

**NON-COLLUSION AFFIDAVIT
ORANGE COUNTY SCHOOLS
REQUEST FOR QUALIFICATIONS FOR PROGRAM MANAGEMENT SERVICES**

The undersigned affirms that the proposal made herein is made without any connections with any other person, or persons, making any other proposal for the above item(s): that it is in all respects fair and without collusion or fraud:

That _____ (Firm Name) is not connected in any official capacity with Orange County Schools, and that no person, or persons, acting in such capacity are directly, or indirectly, interested herein or in any of the profit arising or anticipated from this transaction.

In making this proposal, it is understood and agreed that the conditions set forth in the advertisement for bids, instructions to bidders, terms and conditions and specifications together with the proposal shall form a part of and be construed with the contract under the same.

The acceptance of this proposal by Orange County Schools, as evidenced by the issuance of a Orange County Schools Purchase Order, will be held to be a mutual agreement as to every clause of this proposal and to constitute a contract between the parties hereto.

FIRM NAME: _____

ADDRESS: _____

BY: _____

TITLE: _____

State of North Carolina County of: _____

Sworn to and subscribed before me, this
_____ day of _____, 20____.

Notary Public

My commission expires: