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Town Attorney
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Town of Summerville

October 22, 2018

Request for Qualifications for Town of Summerville Comprehensive Facilities Master Plan

To: Michelle Beltz
Purchasing Agent
Town of Summerville
200 South Main Street
Summerville, SC 29483
Phone: (843) 851-4201
Email: mbeltz@summervillesc.gov

I. GENERAL INFORMATION

The “Town of Summerville”, hereinafter the “Town”, is seeking responses from qualified Consultants interested in providing long term planning services to address existing and future city government physical facility needs. Proposals will be accepted by Michelle Beltz, Purchasing Agent, Summerville Town Hall, 200 South Main Street, Summerville, SC, Monday through Friday, 8:30 a.m. to 5:00 p.m. Proposals will be accepted up to but no later than 2:00 p.m., Friday, November 30, 2018.

II. BACKGROUND

The Town of Summerville is a progressive community with a population of 50,388 located in southeastern South Carolina, and is known as “Flower Town in Pines.” Summerville prides itself on small-town charm with a rich history. Summerville was founded in 1847 and is located in three counties; Berkeley, Charleston, and Dorchester. The Town is governed by a strong Council form of government and a Town Administrator runs day to day operations. Information about Town of Summerville is available on the Town website located at www.summervillesc.gov.

III. PROJECT GOAL

The Town desires the development of a sound, actionable, and fiscally responsible facilities plan that supports the entire town government organization by providing safe and inviting work environments that meet the varying operational needs of many Town departments. Those departments include Municipal Court, Police Department, Engineering, Planning, Administration, Human Resources, Fire and Rescue

Command Staff, Finance Department, and Building Services. A committee of Town staff developed a proposed facilities plan and a financial model to fund the facilities plan. Staff has presented their facilities plan and financial model to Town Council. Council expressed their wishes of hiring a consultant to develop a more comprehensive facilities plan. The selected consultant may use the staff's existing facilities plan as a resource and expand upon. The Town's intent is to retain a consulting firm with the qualifications and staff resources necessary to perform town governmental facility planning services including, but not limited to, space and programming needs assessment, and development of a long-term facilities master plan. The facilities master plan should focus on the preservation and potential redevelopment and/or readapting of current facilities as well as the identification of and/or planning for new facilities to establish a framework for the anticipated Town facility needs for the next thirty years. The successful firm will provide services for the Town as outlined in Section IV. Scope of Work. The Consultant shall demonstrate substantial experience in undertaking and completing the type of work required. All questions and communications, whether of a substantive nature or otherwise, regarding this Request for Qualifications (RFQ) must be submitted via email with the subject line "Facilities RFQ" no later than 5 pm, Friday November 16, 2018. If the Town deems it necessary, it will issue one or more written addenda in response to such questions. Enquiries must be submitted via email to: Ms. Michelle Beltz, Purchasing Agent MBeltz@summervillesc.gov.

The Town reserves the right to waive technicalities or to accept or reject any proposal or combination of proposals based upon the Town's determination of its best interest.

IV. SCOPE OF WORK

Nothing in this Request shall obligate the Town to select a Consultant or enter into any agreement with a Consultant. Projects shall be contingent on a mutually agreed scope of work, fee proposal, and availability of budgeted funds.

The following scope of services is included as a guide for the proposer. It is designed to identify the minimum service level expected from the successful firm and as such should be modified and augmented based upon the experience of the firm, as necessary to complete the project:

General:

1. Phase 1: Space and Programming Needs Assessment
 - a. The Consultant shall conduct interviews with designated Town representatives to elicit individual perspectives of problems needing solutions and observations of past, current, and expected future operational and facility needs and deficiencies.
 - b. For each building, the Consultant shall provide building programming to:
 - i. Identify the nature of work performed in or function of each workspace.
 - ii. Identify on an inter-departmental basis and an intra- and inter- divisional basis what working relationships exist and the level of intensity of those working relationships.

- iii. Identify the physical proximity needs of the aforesaid inter-departmental and inter- and intra-divisional working relationships.
 - iv. Assess whether the proximity of work performed in one space and interrelated with work performed in another space promotes or inhibits the effectiveness and efficiency of the overall work performed in the two or more spaces
 - v. Identify the number of employees using each space.
 - vi. Identify ancillary and accessory programming requirements, such as, but not limited to, data and communications, conference/meeting rooms, printer/copier areas, and file & storage space. Also include functional spaces, such as restrooms, mechanical spaces, vestibules, stairwells, elevators, hallways, and similar space allocations.
 - vii. Identify security issues and concerns and ways they can be addressed.
 - viii. Assess whether the particular space is currently adequate given the nature of the work performed therein or the function thereof.
 - ix. Assess the locations of public safety facilities in relation to emergency service response times.
 - x. Assess whether the particular space will be adequate into the foreseeable future (5, 10, 20, and 30 years out) given the nature of the work performed therein or function thereof and the possible expansion of the work or the number of employees performing such work.
 - xi. Assess each facility's exterior features that support the facility on its site, including public and entry access, on-site storage, and vehicle accommodations.
 - xii. Assess parking capacity for public and staff needs including parking for bicycles.
 - xiii. Assess public accessibility to public meeting spaces and departmental services
- c. Final phase 1 deliverable shall be program update/statement of requirement documents including, but not limited to:
- i. Assessment of departmental and division space needs and requirements.
 - ii. Assessment as to whether current spaces are functioning in order to undertake the work of the Town efficiently and effectively
 - iii. Identification of any efficiency and cost-effective layout alterations that may provide space for additional employees to possibly defer additional construction activity.
 - iv. Forecasts for departmental growth and space needs based on population growth, projected workload, department goals, and use of technology.
 - v. Critical adjacencies between and within Departments.
 - vi. Desired support areas and amenities.
 - vii. Departmental security and safety needs.
 - viii. Desired image of the organization and desired outward image of current and future facilities.

2. Phase 2: Town Government-Wide Facilities Master Plan

- a. Facilitate a process to gain consensus among Town departments on a preferred master plan strategy or group of strategies.
- b. Using information developed in Phase 2, provide a master plan which takes into consideration the Town's anticipated future needs for space and the organizational use of such space, including development or use of space not currently owned, operated or used by the Town, if such additional space is deemed necessary to the cost effective and efficient operation of Town government. This includes identifying property owned or not owned by the Town to develop Town facilities.
- c. Develop a short-term (1-4 years), mid-term (5-15 years) and long term (15-30 years) sequence of events establishing the necessary stages of design, construction, redevelopment, and/or remodeling activity, as the case may suggest, for the preferred strategy taking into consideration the need to maintain services and operations throughout implementation.
- d. Final documents shall include, but are not limited to:
 - i. Master Plan Strategies;
 - ii. Conceptual elevation and plan sketches of new facilities and remodeled facilities
 - iii. Preliminary project budgets;
 - iv. Preliminary project schedules; and
 - v. Other Relevant/Diagrammatic information

Schedule:

The Town's tentative schedule for Request for Qualifications is:

- Advertise for Qualifications: 10/22/2018
- Deadline for Questions: 11/16/2018 (5:00 p.m.)
- Deadline for Responses: 11/21/2018 (5:00 p.m.)
- RFQ Response Due Date: 11/30/2018 (2:00 p.m.)

The Town reserves the right to delay or modify the schedule as warranted and will notify all identified responders of changes. The Town reserves the right to reject any and or all responses and to waive defects, technicalities and/or irregularities in any responses.

Deadlines for Questions:

The town will entertain questions regarding the project up until 5:00 p.m. on 11/16/2018. Questions should be submitted via email prior to this date and time. Questions will be addressed as required and responses will be forwarded to identified responders by 5:00 p.m. on 11/21/2018. All questions regarding the RFQ must be directed to Michelle Beltz at mbeltz@summervillesc.gov.

Deadline for Responses:

The Town will accept RFQ Responses until 2:00 p.m. on 11/30/2018 at Town Hall. Interested Firms shall submit five (5) hard copies of the RFQ Responses. Responses shall be sealed in an envelope addressed to:

Michelle Beltz
Purchasing Agent
Town of Summerville
200 South Main Street

The Town is not responsible for and will not accept RFQ Responses which are received late.

RFQ Response Requirements:

The response shall contain no more than fifty (50) double spaced pages with normal one (1) inch margins, typed on one side only, excluding appendices. Minimum font size shall be 12-point, and the response document page size shall be standard 8.5 inches x 11 inches. True tables (not bordered text boxes) may be single spaced with a minimum font size of 10-point. Photo captions and other text that are not part of the narrative paragraphs and tables do not have font limitations.

Town of Summerville intends to make its selection from among eligible firms that submit an acceptable proposal. All proposals must include the following:

Letter of Interest: LOI should include the following:

- An expression of the Prime Consultant's interest in being selected for the project.
- A statement confirming the commitment of key personnel identified in the submittal to the extent necessary to meet Town of Summerville's quality and schedule expectations.
- Provide the name of the Prime Consultant Principal, Officer of the Firm or Project Manager responsible for this contract and has authority to sign the contract for consultant.
- A summary of key points regarding the Prime Consultant's qualifications.
- Signing the letter of interest constitutes authorization of consultant to submit qualification for the purpose of negotiating and entering a contract with The Town of Summerville.
- Certification of authorized submitter that information contained within is correct by including: "I certify that the information included within this document, is to the best of my knowledge, correct as of the date indicated".

Project Organization Chart: - Limited to one (1) side of a sheet of paper not exceed the size of 11" x 17". This chart must include the names of the key individuals selected for this project, their roles on the project, the names of the consultant by which they are employed, and the lines of communication, to include functional structure, levels of management and reporting relationships for Key Individuals, and major functions to be performed in managing and designing the project. It shall also indicate the people who will be points of contact with the Town of Summerville Project Manager.

Qualifications for Key Individuals.

Names and qualifications for other key individuals that are considered critical to the success of this project in addition to those identified above. Qualifications should include information on experience related to similar projects and previous project work.

- The consultant must provide a chart indicating the present workload of all key personnel to include all active projects (concurrent projects with other entities such as cities, state agencies, counties, COGs MPOs, private sector) and their percentage availability for this project. Additionally, all proposals must clearly list the percentage of work for prime consultant and sub-consultant(s) that will be performing work as part of the project.

APPENDICES

- Provide a list of References who have personal knowledge of the prime consultant's and the sub-consultant's previous performance. Provide three (3) client references each for both the

prime and the sub-consultant(s). The references must include verified addresses, email addresses and telephone numbers, contact persons, and a brief description of services that have been provided similar to those described by Town of Summerville for this project. References shall be shown on separate sheets (limited to one (1) single-sided sheet; one sheet for the prime and one sheet for each sub proposed).

- Size and description of firm. Identify the needed resources specific to this project and how those resources will be secured for the project.

All Qualification Statements submitted in response to the RFQ shall be reviewed in accordance with the evaluation items listed below.

Qualification Statement Review Committee

The Qualification Statement Review Committee shall be comprised of staff from Town of Summerville. The Committee shall determine the firms which meet the minimum requirements pursuant to selection criteria of the RFQ and procedures. The Committee shall select one qualified firm. The Committee may negotiate with one or more firms during the same period and may, at its discretion, terminate negotiations with any or all firms. The Committee shall make a recommendation regarding the award to the Town Administrator and Summerville Town Council who shall have final authority to award a contract to one or more of the successful firms in the best interests of the Town of Summerville.

Qualification Statement Selection Criteria

The Qualification Statement Review Committee shall assign up to the maximum number of points as stated in this section for each evaluation item to each of the proposing firms. All assignments of points shall be at the sole discretion of the Qualification Statement Review Committee. The Qualification Statements all contain the essential information in which the award decision shall be made. The information required to be submitted in response to this RFQ has been determined by the Town to be essential for use by the Committee in the evaluation and selection process. Therefore, all instructions contained in this RFQ shall be met in order to qualify as a responsive and responsible firm and participate in the Qualification Statement Review Committee's consideration for award. Offerors who do not meet or comply with the instructions of this RFQ may be considered non-conforming and deemed non-responsive and subject to disqualification at the sole discretion of the Committee.

The selection of the firm(s) will be made in accordance with the Town of Summerville Procurement Ordinance. Qualification Statements will not be accepted from any firm, company, individual, person or party, parent or subsidiary, against which the Town has an outstanding claim, or a financial dispute relating to a prior contractual performance with the Town. Qualification Statements may be withdrawn by offeror prior to, but not after, the time set for the opening. Upon receipt by the Town, the Qualification Statement shall become the property of the Town, without compensation to the offeror, for disposition or usage by the Town at its discretion. The Town shall have the sole discretion in evaluating both the Qualification Statement and the qualifications of the offerors. The Town reserves the right to reject any and all Qualification Statements and is not bound to accept any Qualification Statements, if the Qualification Statement acceptance is contrary to the best interest of the Town. The Town reserves the right to waive or modify any information, irregularity, or inconsistency in applications received, request modification to applications from any or all offerors during the review and negotiation and negotiate any aspect of the application with any firm and negotiate with more than one firm at the same time. All Qualification Statements shall be evaluated using the same criteria and scoring process. The following criteria shall be used by the Committee to evaluate Qualification Statements:

Evaluation Item Maximum Points

- 1) Experience, qualifications, and technical competence of the staff proposed for the type of work required (40 Points)
 - 2) Past performance of the firm/team on similar type projects (20 Points)
 - 3) Availability of proposed staff and ability to be responsive to Town of Summerville requirements (20 Points)
 - 4) Teams understanding of the specific requirements of this project (20 Points)
- TOTAL POINTS 100 Points

END OF REQUEST FOR QUALIFICATIONS