



**REQUEST FOR QUALIFICATIONS AND PROPOSAL
Owner-Representative/Project Management Services BID #2023-1**

KIPP North Carolina is a network of free, non-profit, high-performing, college-preparatory public charter schools providing an academically rigorous and joyous school experience to 3,100 students in grades K-12 in Charlotte, Durham, Halifax, and Gaston.

KIPP North Carolina builds on a rich tradition of academic excellence and a relentless fight for social justice from the founding of both KIPP Eastern North Carolina (ENC) and KIPP Charlotte. KIPP ENC was the second oldest KIPP region in the nation, founded in 2001. In its 20 years of operation, KIPP ENC has been a cornerstone for students and families in rural Northampton and Halifax Counties. In recent years, KIPP ENC has grown to serve even more students by opening a school in Durham. KIPP Charlotte, which grew out of the strong traditions and academics of KIPP ENC, has supported students and families for the past decade and a half. In keeping with these strong traditions, we understand how important great facilities are to the learning environment for our students, and with this in mind, now look forward to working with all of our stakeholders to reimagine our campuses across the state.

1.0 INTRODUCTION

Your firm has been selected to submit qualifications and a proposal for Owner Representative Services (Program Manager) to KIPP North Carolina Public Schools. KIPP North Carolina Public Schools will secure funding to build and retrofit their KIPP Gaston College Preparatory campus located at 320 Pleasant Hill Road, Gaston, NC 27832, KIPP Academy Charlotte campus located at 931 Wilann Drive, Charlotte, NC 28215, KIPP Change Academy campus located at 5431 Hickory Grove Road, NC 28215, and their KIPP Halifax College Preparatory campus located at 9986 NC-903, Halifax, NC 27839. KIPP North Carolina Public Schools will build the core and shell, interiors up fit, and redevelop the sites in conjunction with these projects.

This request is for Owner Representative Services (Program Manager – PM) commencing at the planning and pre-construction phase through project completion. The selected PM will be immediately integrated into KIPP North Carolina Public Schools team working through all phases of the project(s). This RFQ/P requires a brief summary of qualifications and a proposal for PM services.

2.0 SCOPE OF PROPOSAL

The PM will be an integral member of the project team consisting of representatives from KIPP North Carolina Public Schools. The PM will become the primary representative of KIPP North Carolina Public Schools' interests for all remaining phases of the projects, including assisting in sourcing of appropriate financing, utilizing the firm's skills and knowledge of the construction market to contribute to the project during the pre-construction and construction.

Development Agreement Summary

KIPP North Carolina Public Schools will construct educational spaces and athletic facilities (classrooms, science labs, libraries, ball fields and athletic facilities, common areas, etc.) on its properties, including all necessary site work. Additionally, KIPP North Carolina wishes to explore opportunities for community engagement as part of these projects. Some examples of this may include partnering with groups like Rural Health of North Carolina to build out medical facilities onsite, the public library to increase access to high quality resources for our students, families, and the community at large, or any other community

partners that may want access to facilities and meeting spaces. The process will include the selection of an architectural firm that will be used for design services, and permit plans will be developed in accordance with local building codes. KIPP North Carolina Public Schools will sign a Letter of Interest (LOI) outlining these terms, which will be shared with Owner’s representative upon finalization of contract.

KIPP North Carolina Public Schools seeks an owner representative to ensure KIPP North Carolina Public Schools compliance with the LOI and to monitor and routinely report on compliance with the agreement including but not limited to schedule, cost, and adherence to scope of work. The Owner Representative will interact with Design Consultants, and will manage the execution of KIPP North Carolina Public Schools responsibilities under the agreement.

In general terms, KIPP North Carolina Public Schools will expect the PM to:

1. Ensure KIPP North Carolina Public Schools’ compliance with the Agreement and Federal Procurement Guidelines.
2. Provide guidance and help coordinate plan approval through various governing bodies, working to deliver the project as quickly as possible.
3. Coordinate construction delivery within budget and timeframe from Construction Documents forward.

Specific Requirements

The successful PM will provide the following aligned with the LOI:

1. Represent KIPP North Carolina Public Schools to ensure full project execution in accordance with the terms as outlined in the LOI.
2. Monitor schedule to assure the design, development, and construction of the Project proceeds at a rate necessary to cause the project to be “Substantially Complete” at the specified date (July 2025) and with a Certificate of Substantial Completion certified by the architect.
3. Coordinate with the KIPP North Carolina Public Schools to assist with the review and approval of the Plans and Specifications and construction of the Project.
4. Ensure that no entity modifies, alters, or amend all or any portion of the Plans and Specifications, or construct or reconstruct all or any portion of the Improvements in a manner inconsistent with the Plans and Specifications.
5. Ensure full compliance with KIPP North Carolina Public Schools Procurement Guidelines
6. The project shall be constructed at the KIPP North Carolina Public Schools’ cost and expense pursuant to a bid process run by Project Manager to ensure coordinated delivery.

Program Manager Scope of Work

Scope of services shall include, but may not be limited, to the following:

1. Design Phase monitoring procedures
2. Design Team and Contractor Selection
3. Project Management Plan with the Plan updated as required at all phases
4. Project Milestone Schedule (Critical Dates)
5. Design Phase Coordination, including monitoring and facilitating the design schedule and participating in design progress meetings
6. Provide limited design and constructability review

7. Monitor and report on the Design Phase Schedule
8. Facilitate and/or participate in cost adjustment sessions (coordinate estimates as needed)
9. Facilitate and/or participate in trade-off studies (typically for cost reduction or material availability)
10. Provide routine cost monitoring and update cash flow forecasts (cash flow projection reports)
11. Provide monthly project status reports
12. Collaborate with KIPP North Carolina Public Schools on public relations activities and community engagement
13. Attend job site meetings; perform a minimum of weekly construction observation inspections
14. Identify in writing any non-conforming work
15. Review and recommend monthly progress payments
16. Facilitate and/or participate in development of recovery schedules, if needed
17. Establish change order monitoring system (log) and link to Project Status financial report
18. Evaluate and recommend cost proposals for changes to the project
19. Assist with negotiation of change orders and/or claims; summarize claims analysis

In addition to Scope of Services “standards,” PM shall:

1. Assist with necessary governing body approvals
2. Ensure all debt instruments (bonds, sureties, and other agreements) are in place in accordance with LOI
3. Ensure allocation and completion of site work
4. Attend community engagement meetings

3.0 CLARIFICATIONS

Any questions or requests for additional information regarding the project, selection process, or the attachments should be presented to:

KIPP North Carolina Public Schools, Attn: Christian Drake, 1107 Holloway Street, Durham, NC 27701 and by email to cdrake@kipync.org.

4.0 SUBMITTAL REQUIREMENTS AND SELECTION PROCESS

Include only information that is relevant to this specific Submittal and provide a straightforward, concise delineation of capabilities to satisfy the requirements of the RFQ/P. KIPP North Carolina Public Schools will receive proposals and will make a recommendation for selection based on qualifications and experience applicable to this project. We will conduct interviews with finalists.

The brevity of your submittal is encouraged as you address the following:

4.1 Introductory Letter of Interest

A single page cover letter indicating why your firm and the individuals assigned are suited to provide Owner-Representative Project Management Services for KIPP North Carolina Public Schools. Include any unique qualities and application to this type of educational campus redevelopment, referencing previous similar clients and projects, preferably in North Carolina.

4.2 Statement of Qualifications

Comment on your firm’s qualifications, including general information and any history of the firm deemed necessary. Also, include comments about capacity to take on this work.

4.3 Team Organization and List of Key Personnel

Provide an organizational chart identifying all team members, relationships, and responsibilities throughout the various phases of the project. Provide resumes for each key team member.

4.4 Project Strategy Review

In addition to qualifications outlined in this Section, the PM is requested to provide a fee proposal for Pre-Construction and Construction, and to offer strategies and/or statements on the following relative to KIPP North Carolina Public Schools:

- 4.4.1** Design – review site and floor plans and provide not more than five (5) areas of focus relative to cost, schedule, and constructability.
- 4.4.2** Include any comments or concerns about the preliminary project schedule, and possible avenues for acceleration

4.5 Evaluation Criteria

The evaluation criteria will primarily consider PM Services capabilities noted below:

- 4.5.1.** Describe your experience with this project type, including programming, planning, procurement, financing, and delivery of the scope within schedule and budget.
- 4.5.2** Describe your experience with facilitating value engineering and constructability reviews during the project pre-construction phases.
- 4.5.3** Describe your experience and process for evaluating progress and performance during construction.
- 4.5.4** Provide two (2) Letters of Recommendation for similar services provided to other clients. Include contact information that KIPP North Carolina Public Schools can use to connect with clients.

4.6 PM Services Fee

Provide a labor-fee forecast, preferably by location, based on the personnel assigned and time allocated through the project based on the preliminary schedule.

5.0 METHOD AND DATE OF SUBMITTAL

Electronic delivery of submittal is requested by close of business, June 15, 2023, delivered electronically to the KIPP North Carolina Chief Operating Officer at: cdrake@kippnc.org.

All requirements and questions should be addressed and all requested data should be supplied. By submission of a Submittal, the firm acknowledges that representatives of KIPP North Carolina Public Schools have the right to make any inquiry they deem appropriate to substantiate or supplement information contained in the Submittal.

Submittals for minimum requirements should be prepared simply and economically, providing concise answers to the requested information in the order and format prescribed. Emphasis will be placed upon clarity and completeness of the submitted response. The physical size of all submission materials shall be limited to an 8½ by 11 format submitted in digital (PDF) format. Please avoid redundant and repetitive materials, limit the overall submittal packet to approximately 10 double-sided pages.

6.0 SELECTION PROCESS AND EVALUATION CRITERIA

KIPP North Carolina Public Schools internal review team will review the responses to the RFQ/P and the final candidates will be invited to present to and interview with the internal review panel. On the projected timelines, KIPP North Carolina Public Schools will evaluate the quality of the proposals, interview the finalists, and award the contract in June 2023.

KIPP North Carolina Public Schools will apply subjective selection criteria, which will consider all material submitted in response to this RFQ/P, along with all additional information gathered during the interview process.

7.0 CRITICAL DATES (all finish targets)

- 7.1** Issue RFQ/P: May 15, 2023
- 7.2** Proposals Due: June 15, 2023
- 7.3** Notification of Selected Owner Rep/PM Services: June 30, 2023

DISCLOSURE

Until a contract resulting from this process is executed, no employee, agent, or representative of any professional services provider shall make available or discuss its proposal with the media in any form, electronic or printed, or with any elected or appointed official or officer of KIPP North Carolina Public Schools, or any employee, agent or other representative of either party unless specifically authorized to do so by the KIPP North Carolina Board, Executive Director, or Chief Operating Officer.

END OF REQUEST FOR QUALIFICATIONS AND PROPOSAL