



**Request for Qualifications/Proposals**

**To Provide**

**Program Management Services**

**Supporting Design and Construction**

**Of Parking Deck and Justice Center Annex**

**Cherokee County**

**SOLICITATION No. 2024-002**

# Cherokee County

## Program Management Services

for the

## Design & Construction of a Parking Deck & Justice Center Annex

### Cherokee County

### SOLICITATION No. 2024-002 - Program Management Services

#### SCHEDULE

RFQ/P 2024-002	Date
Issued	November 14, 2023
Questions Due	November 28, 2023
Statement of Qualifications Due	December 12, 2023
Finalists List	January 4, 2024
Finalist Proposals Due	January 16, 2024
Interviews	January 23, 2024
Anticipated Award Date	February 6, 2024

**Note:** Dates after “Statement of Qualifications Due” are subject to change without notice.

**Contact:** Greg Anderson, Procurement Director

**Phone:** 678.493.6034

Once Solicitations have been issued, there is a high preference for submitting all questions through the Bidnet Q&A Feature.

Official Information will be posted and Qualifications and Proposals will be received only through the Cherokee County solicitation portal at:

[www.bidnetdirect.com//cherokeecounty](http://www.bidnetdirect.com//cherokeecounty)

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## 1. *PURPOSE*

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Cherokee County is soliciting Statements of Qualifications from firms interested in providing Program Management (PM) services for the construction of a yet-to-be designed Justice Center Annex and yet-to-be-designed Parking Deck (both constituting the "Program") in Cherokee County, Georgia. This Request for Qualifications/Proposals Solicitation (The Solicitation) seeks to identify potential providers of program management services to bring about the cost effective and timely delivery of the Program projects in two design and construction phases. All respondents to The Solicitation are subject to the instructions communicated in this document and are cautioned to completely review the entire solicitation and follow the instructions carefully. Cherokee County (Owner or County through-out) reserves the right to reject any or all Statements of Qualifications, and to waive technicalities and informalities at the discretion of the Owner.

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## 2. *GENERAL PROGRAM INFORMATION*

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### **Program Objectives:**

It is imperative that the Program projects be designed, managed and constructed with the utmost regard to safety, quality control, schedule and cost management by all participants, including the PM team, architect, general contractor, and the owner. Elected officials, staff, and citizens of Cherokee County expect the management of the construction process will allow the Program projects to be safely completed at or below the budgeted amount(s); that the structures will be visually appealing and fit into the historic character of downtown Canton and be delivered on-time. The integrity, reputation, skills and performance of the PM must be exceptionally qualified to maintain confidence in the Program participants.

Cherokee County will be the Owner and primary occupant of the Program projects. The PM, Design Professional (Architect), and Construction Professional (General Contractor) will each contract separately with the Owner, and these parties will be the nucleus of the Program team. Exceptionally competent staff and operational efficiency are expected to be of extreme importance. The PM will be responsible for the management the team through the successful completion of the Program.

The Owner is seeking the services of a PM to represent the Owner to oversee the programming, planning, design, and construction phases of the identified Program projects to ensure that all elements of the work meet the required quality design, standards, budget and construction schedule.

The successful PM will have a clearly defined delegation of authority to act on the Owner's behalf and will provide the resources and expertise necessary to understand and be responsible for a broad spectrum of services related to the Program. The PM, as part of its services, will assist with developing a strategy for the best approach for the successful

completion of the Program projects. The PM will provide collaboration, guidance, and assistance in execution of the Projects. The Owner insists that all parties to this project approach it with a spirit of teamwork, openness and partnership.

In addition to Program Management activities aimed at achieving the overarching goals of the Justice Center Construction Program, the selected Program Manager will be required to carry out or oversee specific Project Management tasks. These tasks include but are not limited to project planning, scheduling, resource allocation, and risk management for the individual projects identified in the purpose statement. Specific responsibilities will be identified and agreed upon during the initiation phase and documented in a Project Charter for each project.

**Project Description:**

The Project consists of working with the County selected architect for the Parking Deck design, supporting the selection process of an architect to develop acceptable design and complete drawing packages for the Justice Center annex, support the selection of two general contractors one for each production phase of the Project and the overall Program management of the Project.

**Project Delivery Method:**

A Project Delivery Method has not been decided upon. As a part of your response, please be prepared to address what method of project delivery your firm would recommend for either one or both projects and explain your recommendation and / or process for determining the recommendation.

**Construction Budget:**

The total budget for the Project is estimated to be \$94,000,000; \$21,000,000 for the Parking Deck and \$73,000,000 for the Justice Center annex. The final budget may differ due to actual program requirements, funding, final design elements, and other circumstances.

**Project Schedule:**

The Parking Deck architectural solicitation will be managed by the County and is expected to begin in the first quarter of 2024 and the design targeted to be complete within 4 to 6 months of award of the design contract.

The PM will support the selection of the architect and GC for the Justice Center Annex which is expected to go out for design 2Q25 with design and construction documents being developed in 3Q25.

Please note that the projected timelines are subject to change based on the finalization of design elements, funding allocations, method of project delivery, and other external factors that may influence the project schedule.

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### 3. SCOPE OF SERVICES

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The following is a list of the minimum level of services to be provided by the PM in Cherokee County Georgia. Qualification documents presented to the County should acknowledge that these services are provided as defined herein.

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#### 3.A Planning Phase and General Duties

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##### Budget and Cost Management:

- Develop a comprehensive Project Budget.
- Develop a cost management protocol for the Project.
  - Identify and track decisions that have an impact on the schedule and/or Project cost.
- Develop a cash flow model for the Project.
  - Review and recommend approval of all commitments on the Project; ensure they are accounted for with in the Project Budget.
  - Review and recommend payment of all invoices and pay applications on the Project; ensure they are accounted for within the approved commitments.

##### Schedule Management:

- Maintain proper project records in format acceptable to Owner, turn over project records upon completion.
- Prepare a detailed task-related Master Project Schedule.
- Develop a schedule management protocol for the Project.
- Incorporate the Design Professional's design schedule and the Construction Professional's construction schedule into the Master Project Schedule, as well as non-construction activities, such as Owner activities, Furniture, Fixtures & Equipment, security, etc.
- Drive achievement of milestones and activities to ensure all project team members remain on schedule.

Advise on major project decisions, such as Project Delivery Method, programmatic elements, phasing, etc.

Support the management of all contracts, amendments, and change orders associated with the Project.

Develop a meeting schedule and attendance list for all meetings. Prepare an agenda and record meeting minutes for all meetings.

Maintain a day-to-day presence on the job site.

Become familiar with and adhere to County policies and identify essential or major points of interest to the County and suggest other activities that might have been overlooked or may be the best interests of the County.

Assist with site due diligence.

Assist of lead negotiations with Architects, General Contractors, other consultants, engineering firms and subcontractors.

Assist of lead negotiations with utility companies concerning the installation of electrical, sewer, gas, water and fiber required for the Project.

Provide biweekly reporting updates to the County. Attend Board of Commission Meetings, when requested and as needed, to provide project updates.

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### *3.B Team Selections*

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Design Partners Professional Selection Services:

Assist with Development of Solicitations:

- Assist with assembling/ coordinating Selection Committee.
- Coordinate key selection dates with Selection Committee and Procurement.
- Engage industry to garner interest.
- Arrange and conduct Site Visit.
- Coordinate answering questions and issuance of addenda.
- Arrange and coordinate Design Professional interviews.
- Review contract and assist with pricing and fee negotiations.

Oversee to procurement of other consultant selections, as applicable, including, but not limited to, surveying, testing, commissioning, etc.

Note: The selection of the Architect for the parking deck design will be managed by the Project Owner and will be conducted concurrently with the selection process for these Program Management Services, so no support will be required for this activity.

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### *3.C Design Phase*

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Represent the interests of Cherokee County during the preparation of design documents at each design phase:

- Programming
- Schematic Design
- Design Development
- GMP Amendment(s), if applicable
- Construction Documents

Review all design drawings to ensure alignment with the program.

For Parking Deck only, review the load calculations for accuracy and structural materials specifications specified to address the loads created by architect and concrete supplier.

Ensure the Architect coordinates with Authorities having jurisdiction and with utility providers.

Ensure coordination between various elements of the Project, such as construction, furniture, equipment, signage, and Audio/Visual systems.

Ensure the County is involved in all design-related decisions. Coordinate reviews of all design phases with County staff.

Depending on the Project Delivery Method, lead the budget reconciliation process with the Design Professional and Construction Professional at the conclusion of each milestone to ensure the Project is within budget. Lead the Value Engineering process and provide recommendations to the County as it relates to aesthetics, lifecycle, maintainability, durability, and longevity considerations.

Work with the architect to ensure permits are obtained in an efficient and timely manner.

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### *3.D Development of Cost and Price Estimates and Analysis for Negotiation.*

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Depending on the Project Delivery Method, develop a framework for preparation and negotiation of the GMP or RFP Price.

Review the proposal pricing or GMP to ensure qualified bidders are solicited and adequate competition is received, document and track all activities and decisions and financial commitments, be able to retrieve upon request.

Track decisions made during negotiations, if applicable. Ensure these are accounted for in the Project and that the Owner is fully informed.

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### *3.E. Construction and Closeout Phase*

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Monitor and manage construction activities that will affect the Project's cost, schedule, and quality.

Formally and informally, keep the County informed of project progress as well as any decisions needing their input.

Attend all OAC meetings and record meeting minutes.

Maintain an onsite presence during construction activities to represent the interests of the

County, assist in clarifying where input is required as it relates to design or construction issues, and ensure the Project is well and duly constructed.

Monitor Construction Materials Testing and Special Inspections, and Commissioning, if applicable.

Monitor MEP system startups.

Coordinate training and receipt of attic stock and keys with the County.

Coordinate the final building Punch-list.

Review the full and complete set of all closeout documents, including warranty documents, O&M manuals, maintenance agreements, and as-builts.

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### *3.F Furniture, Fixtures and Equipment (FF&E)*

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- Oversee design of FF&E.
- Manage FF&E budget as part of overall Project budget management services.
- Provide recommendations to the County on procurement options and oversee selection.
- Coordinate lead times, ordering, and move-in of FF&E with construction.

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## *4. SELECTION PROCESS*

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**Qualification Assessment:** A Selection Committee consisting of representatives of the Owner and potentially other Owner designated representatives will determine the firms believed to be most qualified to provide PM services for the Project. Responses to the RFQ will be evaluated against a set of weighted criteria to make such determination.

**Most Qualified Proposals and Interviews:** The Selection Committee will then develop a shortlist of firms who will be invited to develop a 20 page proposal/presentation specifically addressing Project specific application, addressing the topics in the Phase II section and participate in an interview process. The successful PM will be determined by a ranking of scores from the evaluation of proposals presented during the interviews.

The County will negotiate a contract with the highest-ranked firm, see Section 9, “Negotiation Upon Final Selection”.

### **Phase I - Criteria for the Evaluation of Statements of Qualifications:**

**30% Stability** of the firm, including the firm's corporate history, growth, resources, form of ownership, litigation history, financial information, and other evidence of stability, see section 6.1 for additional detail.



**30% Firm Qualifications** to provide services for the Project, including firm's apparent fit to the project type and/or needs of the Owner, and any special or unique qualifications for the Project, current and projected workloads, the proximity of office to Project location, and services offered by the firm, see section 6.2 for additional detail.

**40% Previous Performance and References** of the firm including level of quality of the services of the firm to previous customers, customer's statements of that quality, the firm's ability to meet established time requirements, the firm's response to Project needs during design and construction, the firm's control of design schedule, quality and budget. The Owner will use references from stakeholders of the Owner's choosing from previous projects of the finalists, among other information as necessary.

#### **Phase II -Criteria for the Evaluation of Proposals (Short Listed Firms Only):**

**20% Proposed Project Team.** Experience of the Principal-In-Charge, Program Manager, cost management professional, project engineer and other supporting roles on completed projects of similar size, type, and complexity; assigned team's experience with effective budget and schedule control; availability of the proposed team for this project.

**50% Quality of Proposed Management Plan.** The firm's cost and schedule management plans; the PM's approach to managing changes within the Project budget and schedule limitations for The Project. The plan will take into account the limited space available, traffic considerations and proposed construction sequencing based on the PM's personal reviews of the proposed job site for the parking deck.

**30% Proposed Program Management Costs.** The PM will propose a pricing based on the content of the work required, the scope and hours required. Pricing may be a mix of fixed price level of effort (FPLOE) and an hourly rate with a not-to-exceed maximum cost.

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### ***5. SUBMITTAL OF QUESTIONS AND REQUESTS FOR CLARIFICATION***

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It is the responsibility of each respondent to examine the entire solicitation, seek clarification in writing within the Question and Answer period, and review its submittal for accuracy before submitting the document. Once the submittal deadline has passed, all submissions will be final.

The Owner is under no obligation to request clarification from individual proposer regarding their submission and reserves the right to ask for additional information from all parties who have submitted qualifications.

Questions about any aspect of the solicitation, or the Project, will be submitted in writing through BidNet Direct no later than the date and time indicated in the solicitation schedule, or as amended via an addendum published on the County's BidNet page.

The deadline for submission of questions relating to the solicitation is the time and date shown in the Fact Sheet, page 2 of this solicitation. All relevant questions and requests for clarification

received in writing, prior to the deadline will be compiled, and answers will be posted as addenda.

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## *6.1 QUALIFICATIONS FORMAT/DELIVERABLES, Phase I*

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To expedite the review of submittals, it is essential that respondents follow the format and instructions outlined below. Failure to submit any form with required by this solicitation may result in the firm being eliminated from consideration for this project at the Owner's discretion.

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### *6.1.1 Stability*

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Provide basic company information as identified in Section 10, Additional Terms and Conditions.

Identify office from which the Project will be managed and this office's proximity to the Project sites. If applicable, indicate the year the local office was established and the number of persons staffing that office and their disciplines.

Briefly describe the history and growth of your firm(s). Provide general information about the firm's personnel resources, including disciplines and numbers and classifications of employees, and locations and staffing of offices.

Provide information regarding your organization's ability to contract with state and federal agencies as a representative of clients.

Provide the name of the insurance carrier, types of coverage and deductible amounts per claim.

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### *6.1.2 Firm Qualifications*

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Describe your firm's proposed organization for the program management team. Please designate all specific individuals and their roles on your team by submitting an organizational chart for the Project: At a minimum, the Project organization chart must show the names of key program managers and staff; descriptions of responsibilities for all proposed staff.

Provide for each of the above personnel current resumes listing relevant project experience and percentage of the person's time to be committed to this Project.

Please identify the individual who, from project start to finish, will be the leader of your team and the principal point of contact between your firm and the Owner. Provide detailed information on the qualifications of this individual and the direction, authority, and management tools that will be provided to the individual by the firm. This individual's competence, his/her leadership, and

his/her ability to achieve customer satisfaction will be heavily considered in the selection.

Provide examples of your team's experience in three similar projects, including the following information:

Project name, location and dates during which services were performed.

Project delivery method (e.g. construction manager at risk, design-build, or design-bid-build).

Brief description and representative photo of project and physical description (square footage, number of stories, site area).

Services performed by your firm.

If your firm has more than one office, indicate which office was responsible for each of the example projects.

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### *6.1.3 Previous Performance and References*

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Provide any information that may serve to differentiate the firm from other firms in suitability for the Project as can be supported by previous projects. This may include, but is not limited to, the firm's fit to the unique project needs of the Owner, any special or unique qualifications and/or projects that are substantially similar that transfer directly to the technical requirements and construction concerns of managing the Project. Include information regarding current and projected workloads, the proximity of office to Project location, and any techniques or methodologies offered utilized by the firm on other projects that may be of value for this project type.

Provide non-discrimination policies and describe the firm's record and methodologies of addressing public safety, social, environmental, historical preservation, accessibility for persons with disabilities and special needs, or other related concerns.

Provide information on any special services offered by the firm that may be relevant and available for the Project.

Provide other Owner's stated satisfaction in program management and/or overall service of your firm. Provide any Owner-written letters of reference/recommendation about the firm's performance on the Project.

Provide for reference projects sighted in your Qualifications submittal Project Owner's current contact information.

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## *6.2 QUALIFICATIONS FORMAT/DELIVERABLES, Phase II*

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Phase II is to be completed only upon request by the County for those scoring high enough to make the short list.

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### *6.2.1 Proposed Project Team, Phase II*

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Provide resumes or CVs for the proposed management team.

Provide the communication plan for managing the Project; include the Owner, Architect, General Contractor, regulatory bodies (such as the Fire Marshall) and potentially the Board of Commissioners.

Provide information regarding the number and type of projects the proposed team members have worked together over the last five years.

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### *6.2.2 Proposed Management Plan Approach, Phase II*

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Provide a statement of your definition of your firm's proposed overall role in this project, your anticipated level of management responsibility and accountability for project concerns.

Describe your process for efficiently resolving issues and maintaining the Program and project commitments while working collaboratively with the Owner and stakeholders as applicable.

Provide detailed procedures for routine solving of complex project issues without compromising your team commitments.

Provide your proposed timeline covering the scope of design and construction of both projects based on award date of the work for this contract.

Provide detailed work plan for the Program. Include a skill mix and level of effort breakdown in the work plan (exclusive of Pricing).

Each milestone must include detailed steps describing the tasks to be done.

Describe systems and procedures your firm uses to manage the Project schedule.

Describe alternatives that may be explored to shorten the schedule.

Explain your process for architect administration.

Explain your process for construction administration.

Provide your detailed plan for applying any services not specifically mentioned herein.

Explain the relevance of these services to this project and how they benefit the Project.

A General Statement of Work as it pertains to the overall offer and Scope of Work will be requested from all Shortlisted Firms.

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### *6.2.3 Proposed Program Management Cost Phase II*

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Provide a work breakdown structure and associated cost for managing the Project.

The proposed cost is to be tied to activities, skill mix, and level of effort to perform these tasks, and not tied to a percentage of the projected Project costs.

This effort will be tied to the overall anticipated cost/fees for the Program.

The consultant will be asked to provide a buildup from cost to final billable fixed rates for all anticipated Program costs. These rates will be fixed for one year for the consultant ultimately selected for award and may be renegotiated annually based on relevant economic price indicators and actual costs.

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## *7. INSTRUCTIONS FOR PREPARING THE PROGRAM STATEMENT OF QUALIFICATIONS*

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All responses must use a minimum of an 11-point font. Total page count of the initial submittal must not exceed 20 pages addressing the topics raised in (A) Section 3, Scope of Services and in (B) Sections 6.1, 6.1.1, 6.1.2 and 6.1.3 (Qualifications).

The following qualification requirements will NOT count against the page count (i) completed forms required by the County as defined in Section 10 – Additional Conditions and Qualifications, (ii) a two page cover letter, (iii) the documentation required to substantiate Financial Stability as defined in Section 11 and (iv) the title page. Submittals that involve more than one firm's qualifications must include qualifications within the 20 page limit.

Emphasis should be on completeness, relevance, and clarity of content; generic promotional materials are not desired.

An additional 20 pages will be allowed for shortlisted firms to address items identified in Section 6.2. The Price Proposal is excluded from this page limit.

File Naming Convention:

Solicitation responses are to be submitted via County's BidNet page. Files to be PDF or Excel

and be named and saved to the BidNet page as follows:

Approach: Solicitation Number\_Company Name\_File 1 of X.

Example: RFP2024-002\_Your Company Name\_File 1 of 1

Note: If more than one PDF file is required then 1 of 2 and 2 of 2, etc.

No late submissions: No submissions will be received or accepted after the above specified date and time. Submissions made after the designated date and time will be deemed invalid and returned unopened to the proposer. The Owner reserves the right to reject any incomplete submission, contact client references, and/or require further information.

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## *8. SHORTLIST & INTERVIEW PROCESS*

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The Owner may choose any number of firms to interview based on the Qualifications scoring and establishment of a competitive range by the Owner based on the scoring and criteria. The following information is provided regarding the Interview process.

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### *8.1 Interview Format:*

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The primary intent of the formal interview process is to provide the Selection Committee with in-depth and clarifying information about the firm within the specific context of the Program requirements; information provided should assist the Selection Committee in making an informed decision as to the proposer best suited for the work. The time allotted to each firm for the interview will not exceed 55 minutes with the schedule consisting of 5 minutes for introductions and setup, 35 minutes for presentation, 10 minutes for Committee questions, and 5 minutes for wrap-up and knockdown.

Firms should:

- Be available to start on-time
- Have proposed key team members participate in the presentation
- Demonstrate thorough understanding of the Program.

Firms should focus their presentations on criteria defined for Section 6.2 addressing Phase II Selection Criteria:

- Specific background and roles of your proposed team;
- Describing their detailed plan for managing the design, construction, schedule, budget, and quality on the Program; and
- Unique characteristics or services the PM offers

Additional suggestions for consideration can be found at: [Cherokeega.com](http://Cherokeega.com) / Procurement / Vendor Resources / Improving Your Proposal Presentation

While an HDMI connection and monitor will be available for interviewing firms; firms should be prepared for alternative setup in case of any unforeseen technical difficulties.

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## *8.2 Proposal/Interview Location:*

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Cherokee County Administrative Building  
1130 Bluffs Parkway  
Canton, GA 30114  
Upper Level

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## *9. NEGOTIATION UPON FINAL SELECTION*

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Upon completion of interviews by short-listed candidates, the proposing firms will be ranked according to their scores in descending order of recommendation. Negotiations will then be initiated with the highest-ranked firm meeting at least the minimum requirements to finalize the pricing and terms and conditions of the contract. In the event that a satisfactory fee and terms cannot be reached with the highest-ranked firm, the Owner will formally terminate the negotiations in writing and enter into negotiations in turn with the second highest ranking firm meeting at least the minimum requirements and so on until a mutual agreement is established and the Owner awards a PM services contract. The Owner reserves the right to reject any or all proposals at its sole discretion and not make an award for these services based on this solicitation.

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## *10. ADDITIONAL CONDITIONS AND QUALIFICATION REQUIREMENTS*

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See Standard Solicitation Terms, Qualifications, Bids & Proposals posted with this document, and incorporated into this solicitation by this reference.

The County's standard Professional Services Agreement will be used to contract for the tasks and services defined in this solicitation with the following special conditions of the Program:

1. The term associated with this contract is a completion term, based on final delivery of the two contemplated projects.
2. Task Orders will be utilized to incrementally fund and release portions of the work based on the initial rates established through negotiations, and the work to be done under each task order. Each Task Order will include a specified period of performance, a statement of work, and a cost limitation. Task Orders may be issued on a Lump Sum or Time and Materials Not-To-Exceed basis. If Time and Materials is requested as a Task Order Type, materials and other costs will be accounted for in accordance with section IIIC of the Sample Agreement.

Those organizations responding to this solicitation are to provide qualifications and proposals that consider these terms as written.

The following Appendix forms located in the Standard Terms, Qualifications, Bids & Proposals referenced above are to be completed and submitted with this Solicitation:

Appendix A Information & Addenda Acknowledgement Form  
Appendix B Non-Collusion Affidavit  
Appendix C E-Verify Affidavit  
Appendix D References / Reference Projects  
Appendix E Acceptance of County Agreement  
Appendix F Certification Regarding Debarment, Suspension

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## 11. FINANCIAL STABILITY

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Firms will only be considered once there is a determination of financial stability. The County offers three ways to be evaluated for financial stability:

Please provide ONE (1) of the following:

1. D&B Vendor Rating Report Submit Complete Report (Summary & Detail),

Or

2. A letter from a professional accounting firm that is familiar with your business stating the following information and their professional assessment:

- A) Based on the last complete year of audited financial statements of 2022.
- B) The following financial data is hereby submitted to demonstrate adequate financial resources for the subject Program:
  - i) Sales
  - ii) Current and Quick Ratio
  - iii) Debt to Equity Ratio
  - iv) Statement of Overall Profitability
  - v) Account's professional opinion as to the adequacy of the solicitation respondent's financial ability to perform the work,

Or

3. Last two years of the most current audited financial statements.

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