

Town of Milton Request for Qualifications



Master Service Plan

for

Asset Inventory & Assessment Drinking Water

Asset Inventory & Assessment Wastewater

Viable Utilities Reserve Wastewater Construction

RFQ EXTENSION Issue Date: April 29th, 2025

Proposal Due Date: Tuesday May 6th, 2025

Project Period: 22 months

RFQ Contact: Hope Stuart, Environmental Planner PTRC

Email: hstuart@ptrc.org

Phone: 336-904-0300

IF YOU NEED ANY REASONABLE ACCOMMODATION FOR ANY TYPE OF DISABILITY IN ORDER TO PARTICIPATE IN THE PROCUREMENT, PLEASE CONTACT THE PIEDMONT TRIAD REGIONAL COUNCIL AS SOON AS POSSIBLE

GENERAL

The Town of Milton in partnership with the Piedmont Triad Regional Council is seeking proposals from qualified firms to provide Engineering Services to complete three upcoming grants awarded by the North Carolina Department of Environmental Quality. Asset Inventory and Assessment (AIA) for Drinking Water System, Asset Inventory and Assessment (AIA) for Wastewater to include Engineering and Construction services for a Viable Utility Reserve (VUR) project for their wastewater system. These projects are essential for identifying vulnerabilities and creating a sustainable plan to address them. By thoroughly assessing the current state of the system, the AIA's will enable the development of a comprehensive strategy that ensures the continuity and safety of Milton's drinking water services. The VUR will involve the rehabilitation and replacement of existing public wastewater infrastructure. Addressing these challenges will be crucial for ensuring long-term sustainability, regulatory compliance and protect the health and well-being of Milton's residents.

BACKGROUND INFORMATION

The Town of Milton's drinking water and wastewater systems are facing three significant challenges that jeopardize its sustainability and reliability over the next five years. The first and foremost challenge is the *Age of Infrastructure and Risk of Infrastructure Failure*. Much of the system's core infrastructure is showing advanced signs of wear and deterioration. These aging components are increasingly prone to frequent breakdowns, raising the risk of catastrophic failures that could disrupt water services and lead to costly emergency repairs. The Town of Milton has previously engaged in asset management and capital planning efforts for its drinking and wastewater system, most notably through the development of an AMP in February 2024. In addition to infrastructure concerns, the town is grappling with *Public Health and Environmental Compliance Issues*. The compromised state of the infrastructure has already resulted in water quality concerns, putting public health at risk and leading to several regulatory violations. The outdated water treatment and distribution systems have struggled to meet regulatory standards, exposing the town to potential penalties and further threatening environmental and public health. Another significant challenge is the *Loss/Lack of Institutional Knowledge* within the town's water management team. The recent loss of key personnel, who were integral to the operation and maintenance of the system, has created a substantial knowledge gap. The town has developed some system maps, which have been used to guide maintenance activities and emergency responses. However, these maps are limited in scope and detail, lacking comprehensive spatial data and failing to capture all critical infrastructure components accurately. The proposed AIA project(s) will build upon earlier work by providing a more detailed and systematic assessment of the entire water system. It will enhance the asset inventory with more accurate and complete data, incorporate advanced GIS mapping to

improve spatial understanding, and develop a comprehensive risk-based condition assessment to prioritize critical infrastructure needs. The AIA(s) will provide the detailed insights and actionable strategies needed to ensure the long-term sustainability and reliability of Milton's drinking and wastewater water systems. The VUR project will repair and replace components at the wastewater treatment plant. Engineering is needed to repair and replace various parts and components throughout the system. The construction project should resolve all NOV issues and restore back into proper function the towns sewer collection system and wastewater treatment plant.

Note: The AIA should be done in accordance with DWI guidance per **Attachment C**

SCOPE OF SERVICES

Asset/Data

- List of Assets/Asset Registry for Drinking and Wastewater Systems
- Organization of asset inventory data into an asset hierarchy for both systems
- Complete a risk-based condition assessment of all drinking and wastewater assets
- Develop accurate and compliant asset inventory tables meeting NCDWI guidelines for both systems
- Comprehensive site visits to finalize the asset inventory and assess the condition of facilities and vertical assets, their GIS location, including data collection through field observations and staff interviews
- Ensure the completion of data for all linear assets, ensuring that the town has a comprehensive and accurate understanding of its pipeline network
- Prioritize clean up of data ensuring all components of the wastewater system are accurately documented
- Develop a comprehensive GIS MAP & Database for drinking water and water systems
- Lead and Copper Rule Revision (LCRR) compliance planning and inventory

Capital Planning

- Create a Revised CIP for Drinking and Wastewater Systems- recommended 20yr horizon with integrated AIA findings.
- Develop a new rate study to address capital funding gaps
- Rate study should be conducted in accordance with DWI guidance- **Attachment D**

Field Work/On-Site Services

- On-site assessment of facilities and delivery of comprehensive Site Visit Plan

- Identify and prioritize the replacement of aging, corroded pipes that are most at risk of leaching contaminants like lead and copper into the water supply.
- Replacement of sewage and grinder pumps located at private residences and shops within the Town of Milton service area
- Repair and replace various wastewater components identified as priority items within the NC-DWR inspection and AMP CIP dated 02/02/2024 and grant application.

Training

- Support the establishment of a structured training program for all utility staff, focusing on the specific needs of the drinking water system.
- Create a comprehensive Field Safety Plan considering anticipated hazards for utility staff for both systems

Deliverables

- Detailed roadmap for achieving and maintaining regulatory compliance, including specific actions to address any past violations and ensure that the water system meets all required standards
- Detailed documentation of all aspects of the drinking and wastewater system, including standard operating procedures (SOPs) including Operation and Maintenance, maintenance logs, and emergency response plans.
- Draft and Final Asset Management Plan, GIS data layer in a form the Town can easily access and maintain the data.
- Facilitate the implementation of modern monitoring systems that ensure real-time compliance with Safe Drinking Water Act standards
- Create detailed documentation of all aspects of the drinking and wastewater water system, including standard operating procedures (SOPs), maintenance logs, and emergency response plans
- Submit and compile a preliminary project scope that includes a description of the AIA Drinking Water & AIA Wastewater project, cost estimates, and schedule for each major task to Piedmont Triad Regional Council by **June 9, 2025**
- Submit and compile a preliminary project scope that includes a description of the VUR Construction project, cost estimates, and schedule for each major task by **July 1, 2025** to Piedmont Triad Regional Council.
- **All Services must be completed by March 10th, 2027**

MILESTONES for Drinking & Wastewater AIA's

Milestone	Date
Preliminary Scope Submittal	June 9, 2025
Preliminary Scope Approval	August 8, 2025
Executed Contracts Submittal	November 7, 2025
Draft Project Deliverable Submittal	November 7, 2026
Final Closeout Including Final Disbursement	March 10, 2027

TENTATIVE MILESTONES FOR VUR

Milestone*	Date
Engineering Report Submittal	July 1, 2025
Engineering Report Approval	December 1, 2025
Bid & Design Package Submittal	June 1, 2026
Bid & Design Package Approval	October 1, 2026
Advertise Project, Receive Bids, Submit Bid Information, and Receive Authority to Award	February 1, 2027
Execute Construction Contracts	March 1, 2027

NOTICES & STANDARDS

- A. **General:** This request for qualifications does not commit The Town of Milton to enter into agreement, to pay any costs incurred in the preparation and submittal of a proposal in response to this request or in subsequent interviews and negotiations, or to procure a contract for the project. The Town of Milton reserves the right to issue further Requests for Qualifications (RFQs), as needed, and solicit responses from firms not selected as part of this process.

The selected firm as part of its preconstruction services, will assist with developing a strategy for the best approach for the successful completion of the project. This grant requires a firm to create requests for reimbursement for the Town's final approval and signature.

- B. **Selection and Evaluation Criteria**, in accordance with procurement standards set forth in 2 CFR 200 (Uniform Guidance): In general, the PTRC and the Town of Milton will be seeking to select a firm that possesses the following minimum qualifications:
1. A min. of five (5) years of civil engineering services
 2. Demonstrated financial and construction capacity to undertake a project of this magnitude.
 3. Experience and knowledge with capacity for design and engineering services related to performing an Asset Inventory Assessment.

4. Thorough knowledge and understanding of SDWA standards and NCDWI asset inventory tables.

C. **Consultant/Contractor Selection:**

The most responsive bidder will be evaluated and selected based on the following

1. **Demonstrated Experience:** Consideration toward those with prior experience in performing similar work over the past five years or more, to include the company's technical and organizational resources available for implementing an AIA and VUR (30 points).
2. **Capacity/Scheduling:** Demonstrated capacity to complete the project with understanding of the items listed under the Scope of work. Team member roles and experience listed (20 points).
3. **Planning and Design:** Describe activities the selected firm will undertake to develop and finalize the project, including review of conditions, feasibility options, analyzing and documenting environmental impact, preparing design and construction documents, and aligning construction with relevant permits if needed (30 points).
4. Previous **Experience working with Small Towns** (5 points)
5. **Price:** Provide firm's fixed fee or tiered fee for subcontractors and consultant work performed. Also provide fixed price and/or hourly rates for specific components of the anticipated Design Build services. Finally provide firm's fee expressed as typical percentage of cost of work (5 points).
6. **Financial and Legal:** Provide details on legal issues arising within the past 5 years. (Pass/Fail).
7. **References:** Provide 2-3 references, may be included in capacity/scheduling above (10 points).

Total available points: 100

Rating and Selection Team:

A selection committee has been established to review and evaluate all documentation submitted in response to this RFQ. The committee will conduct a preliminary evaluation of all documentation to determine that interested firms are qualified to perform the required services.

Following a review of the qualified submittals, the selection committee will rank the firms based on the criteria identified above. If a contract cannot be negotiated with the highest ranked firm, negotiations with that firm shall be terminated and negotiations shall be initiated with the next highest ranked firm.

It is the Town of Milton's intent to make a selection in a timely manner following the submittal date. The Town of Milton reserves the right to reject any or all qualifications or to waive any

and all formalities and the right to disregard all non-conforming or conditional qualifications and to enter into a contract with the firm or firms that will serve in the best interest of the Town. The Town of Milton is not legally required to enter into a contract as a result of this RFQ. All deliverables will become the property of the Town.

ANTICIPATED SCHEDULE FOR SELECTION PROCESS

RFQ EXTENSION Issue Date	April 29 th , 2025
RFQ Submittal Due Date (IN PERSON)	May 6 th , 2025 by 5:00 pm
Questions Submitted by	May 1 st , 2025 by 5:00 pm
Review of RFQs and Selection of Short List of Qualified Firms	May 6 th - May 11 th
Interviews and Follow-up inquiries with potential firms, if necessary	May 6 th - May 11 th
Selection of firm, Negotiation/Design Proposal	May 13 th
Recommendation and Approval from Council	May 13 th
Prepare and send Master Agreement to Firm Selected	Within 5 business days of notification

Submission Guidelines: Each response should contain the following:

A. Cover letter on company letterhead by a member of the firm with authorization to contract professional services. To include company name, mailing address, phone number and email address.

B. Statement of Qualifications: Identify and describe the qualifications of the firm and professional services that may be provided.

C. Team & Project Management: Identify the proposed project team and key personnel: Provide a list of licensed contractors, and design professionals to include a brief resume of the project manager to include years of experience, certifications and education. Describe briefly how projects will be successfully managed. Be sure to include experience with managing previous Ecological Restoration projects if eligible.

D. Project Schedule: Describe the planned and envisioned workload of the proposed team members for the timeframe of this contract with verification of project completion within timeframe proposed.

E. Terms and Conditions of the Contract: The PTRC proposes to enter into an agreement utilizing standard design build contracts. This information will be provided to the selected consultant(s) during contract and scope negotiations.

F. References: Project reference list describing at least two (2) projects completed within the past five years that represent the strengths and unique qualifications of the team. The list should contain project titles, locations, start and end dates, name of project managers, and name, phone number and email address of references.

G. Price Estimates: Provide firm's fixed fee or tiered fee for work expected (separate fee sheet does not count against page restrictions). Please submit fee schedule for engineering services separate from the proposal.

H. Legal: List and describe any litigation, arbitration, or claims by your firm against any project owner because of a contract dispute in the past 5 years. List any claim filed against your firm from projects that have occurred within the past 5 years.

I. Format: RFQ responses must be submitted electronically and be 12pt font size and limited to no more than 15 pages excluding the cover page and cover letter.

J. Questions: Any questions regarding this RFQ can be submitted to Project Manager, Hope Stuart hstuart@ptrc.org in writing no later than Thursday **May 1st by 5:00 pm**. Responses will be provided via an addendum as needed.

K. Insurance Requirements: **A copy of the firm's Certificate of Insurance (COI) and completed W-9 will be required at the time of selection. Consultant must meet the Liability Insurance requirements of the Town of Milton.**

General Requirements

- a) If selected, the consultant(s) shall be registered through the NC Department of the Secretary of State.
- b) At the time of execution of contracts and issuance of the Notice to Proceed, the selected contractor shall furnish the City payment and performance bonds in the amount of 100% project cost
- c) Insurance Requirements: Proposals shall include information certifying that the consulting firm can provide the following minimum insurance coverage prior to execution of a professional services agreement. **A copy of the firm's Certificate of Insurance (COI) will be required at the time of selection. A copy may be provided along with submittal and will not count against the page limit.**

Insurance

Minimum Amount

- | | |
|---|-------------|
| (a) Workers' Compensation and Employers Liability | \$500,000 |
| (b) General Liability | \$500,000 |
| | \$1,000,000 |

(c) Automobile Liability	\$1,000,000
(d) Umbrella	\$1,000,000
(e) Professional Liability	\$1,000,000

SUBMISSION DATE- Due by Tuesday May 6th, 2025 (In-person)

Submittals after this deadline will not be considered. Only hard copies will be accepted. Proposals can be mailed or hand delivered to the address below.

Firms submitting proposals are encouraged to carefully check them for conformance to the requirements stated above. If submittals do not meet these requirements, they will be disqualified. **No exception will be granted.**

Hard copy submittals must be printed double-sided and are limited to a total of 20 printed pages, excluding cover, cover letter, and table of contents, which may or may not be provided at the discretion of the respondent. A sheet which has content on both sides shall be considered 2 pages. Respondents are requested not to include other generalized marketing information.

Three (3) copies of the formal bids should be submitted no later than 5 p.m. on Tuesday, May 6th, 2025. The copies shall be sealed in an envelope marked "RFP Response for Town of Milton Master Service Plan."

BID Opening & Tabulation will take place on Tuesday, May 6th, 2025, at 5:15pm. Bidders will be promptly notified.

Proposals can be mailed/hand delivered to:

Jesse Day, Regional Planning Director

Piedmont Triad Regional Council

1398 Carrollton Crossing Drive

Kernersville, NC 27284

Bid Deposit/Bond: Bids on this project must be accompanied by a bid deposit in the amount of at least 5% of the bid and must be in the form of cash, cashiers check, certified check, or bond. The bid deposit/bond must accompany the bid *at the time* the bid is filed with the local government. Bids received without a bid deposit/bond *cannot* be opened and *do not count* toward the 3-bid minimum. The winning bidder forfeits his bid deposit/bond if he does not execute the contract within 10 days after award or fails to provide performance and payment bonds.

Bidders MUST BE LICENSED- A licensed general contractor must oversee the project.

The Piedmont Triad Regional Council is an Equal Opportunity Employer and invites the submission of proposals from small and minority and women-owned firms, historically underutilized businesses.

Attachments

Attachment A: Award Letters(3)

Attachment B: AMP Study

Attachment C: DWI Guidance for AIA

Attachment D: DWI Guidance for Rate Study

E-Verify Requirements Apply to Public Contracts

Under North Carolina law, the E-Verify requirement applies to private employers doing business in this state that has 25 or more employees working in this state. If contractors are individuals who are self-employed (i.e., one employee), or with a business with less than 25 employees, that individual/business is not subject to the E-Verify requirements.

It is the Piedmont Triad Regional Council's responsibility to comply with E-Verify, the successful consultants will be required to submit the completed E-Verify affidavit on the following page at execution of this contract.

Debarment, Suspension, Ineligibility and Voluntary Exclusion

The Contractor shall comply with the U.S. Office of Management and Budget (U.S. OMB) "Guidelines to Agencies on Governmentwide Debarment and Suspension (Non procurement)," 2 C.F.R. 180. These provisions apply to each contract at any tier for a federally required audit (irrespective of the contract amount) and to each contract at any tier that must be approved by an U.S. or State of North Carolina Department official irrespective of the contract amount. As such, the Contractor shall verify that its principals, affiliates and subcontractors are eligible to participate in this federally or state funded contract and are not presently declared by any Federal or State department or agency to be:

- a. Debarred from participation in any federally or state assisted award;
- b. Suspended from participation in any federally or state assisted award;
- c. Proposed for debarment from participation in any federally or state assisted award;
- d. Declared ineligible to participate in any federally or state assisted award;
- e. Voluntarily excluded from participation in any federally or state assisted award;
- f. Disqualified from participant in any federally or state assisted award.

Iran Divestment Act

As provided in G.S. 147-86.59, any person identified as engaging in investment activities in Iran, determined by appearing on the Final Divestment List created by the State Treasurer pursuant to G.S. 147-86.58, is ineligible to contract with the State of North Carolina or any political subdivision of the State.