

**Orange County Schools**  
**Request for Statement of Qualifications (RFQ) for**  
**Mechanical Engineering Design Services**  
**#OCS 26-05-06\_Mechanical Engineering Design Services**

**May 6, 2026**

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## **REQUEST FOR STATEMENT OF QUALIFICATIONS**

This is an invitation and request for a Statement of Qualifications (RFQ) for **Mechanical Engineering Design** services at A.L. Stanback Middle School for Orange County Schools (OCS). This RFQ is to select an engineering firm to outline an alternative HVAC design approach consisting of a like-in-kind replacement of the existing system. The intent is to replace the current single-zone constant volume (2-pipe) system with a functionally equivalent system to maintain operational simplicity while reducing overall project cost, construction impact, and schedule disruption while integrating a modern building controls system to improve operational efficiency and performance, using owner preferred vendor.

Responses to this Request for Statement of Qualifications will be received at the time and location designated within, and shall include the information requested hereafter. Responses received after this time will not be considered. A successful firm will be selected during the specified time above. The need for interviews is not anticipated at this time, however OCS may request one if deemed necessary.

It is the intent of this solicitation process to fully comply with G.S. 143-64.31 for the procurement of Mechanical Engineering services, to announce all requirements for said services, to select firms qualified to provide such services on the basis of demonstrated competence and qualification for the type of professional services required without regard to fee other than unit price information at this stage, and thereafter to negotiate a contract for those services at a fair and reasonable fee with the best qualified firm. If a contract cannot be negotiated with the best qualified firm, OCS shall terminate negotiations with that firm and initiate negotiations with the next best qualified firm. Selection of a firm shall include the use of good faith efforts by OCS to notify minority firms of the opportunity to submit qualifications for consideration by OCS. OCS reserves the right to waive technicalities and informalities and, at its sole discretion, to reject any and all responses to the RFQ.

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## **INSTRUCTIONS FOR SUBMISSION – MINIMUM REQUIREMENTS**

*Submittals shall contain all elements outlined in this section. Submittals shall be prepared simply and economically, and shall provide concise answers to the requested information in the order and format prescribed. Failure to do so may be cause for disqualification from further consideration. Emphasis will be placed upon clarity and completeness of the submitted response.*

### **Statement of Qualifications**

#### **1. Letter of Interest:**

This one page document should be prepared and signed by the representative of the firm authorized to sign contracts. The letter should allow personal expression as to:

- a. why your firm is best suited to perform mechanical engineering services for OCS.
- b. what specific qualities/attributes your firm offers to ensure superior performance.
- c. other information you feel best presents your firm's expertise.

#### **2. Submittal Content:**

The submittal should include the following information as a minimum, organized as outlined below:

- a. Firm's legal name.
- b. Firm's address, phone number, email address, website URL.
- c. Firm's professional license number.
- d. Contact information for communication in follow up to this submittal.
- e. Brief history of the business including:
  - i. Years of service under present business name
  - ii. Prior business names under which like services were offered (if any)
  - iii. Business location (office from which work will be performed)
  - iv. Jurisdictions your organization is legally qualified to offer and practice professional structural engineering services
  - v. Firm's HUB / MWBE status/type.
- f. Project Experience: in a table format, provide a summary listing of all similar projects completed within the past 5 years. Include the following for each project:
  - i. Project Name
  - ii. Facility name and location
  - iii. Size
  - iv. Scope
  - v. Cost at bid
  - vi. Completed construction cost
  - vii. Current owner contact information
  - viii. Year completed
  - ix. Written references from project owner
  - x. MBE Participation (see Attachment A).
- g. Client references: provide (5) references for recent work of similar size and complexity. Include current contact information for each (can be incorporated with item above).
- h. Staff resumes: identify key personnel within your firm who will likely be assigned to our projects. Include Principal, Project Engineer, Project Manager, field staff, and construction administrators.
- i. Litigation: identify any work that resulted in litigation and briefly summarize outcomes. Include judgments, claims, arbitration, mediation, or lawsuits pending or outstanding within the past five years (your organization as either as plaintiff or defendant).
- j. Disclose any history or condition that would put the firm in a conflict of interest for the design and construction portions of the work.

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- k. Project Completions: list any projects your organization has failed to complete any part of its contractual obligation for professional services.
- l. Submit a declaration under penalty of perjury by an authorized corporate officer or principal, stating that reasonable diligence has been used in preparation of the Statement of Qualifications submitted in response to the RFQ and that all information provided is true, correct and complete.

**3. Supplemental Information:**

It is unnecessary to provide supplemental information on the first submittal. However, if the respondent so chooses, additional information may be provided in the form of project profiles, firm brochures, or similar material. Please keep to a minimum.

**4. Additional Requirements:**

- a. Interested firms should familiarize themselves with OCS Board Policies. These policies can be viewed on the OCS website at <https://www.orangecountyfirst.com/our-district-main/board-new>
- b. Any firm responding to this RFQ, along with any sub-consultants, must hold a current license in good standing with the appropriate North Carolina governing agency for each discipline.
- c. The selected firm will be required to provide certification, documenting compliance with the Lunsford Act / Criminal Background Check and requirements as outlined in the G.S. Chapter 14 for personnel who will be on school sites as part of the performance of their work.
- d. The selected firm is required to comply with all applicable laws when providing services for OCS, including E-Verify and requirements of the Affordable Care Act.
- e. The selected firm will be required to provide certification documenting compliance with the Iran Divestment Act pursuant to G.S. 147 Article 6E by documenting they are not listed on the Final Divestment List created by the North Carolina State Treasurer.
- f. OCS requires the following minimum insurance for these projects:

<b>Insurance Description</b>	<b>Minimum Required Coverage</b>
Workers' Compensation	Statutory
Public Liability	Combined Limit
Bodily Injury: Each Person	\$ 1,000,000.00
Bodily Injury: Each Accident	\$ 1,000,000.00
Property Damage: Each Accident	\$ 1,000,000.00
Automobile Liability & Property Damage	Combined Limit
Bodily Injury: Each Person	\$ 1,000,000.00
Bodily Injury: Each Accident	\$ 1,000,000.00
Property Damage: Each Accident	\$ 1,000,000.00
Professional Liability	\$ 1,000,000.00

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## **Submittal Questions**

1. Firms shall submit any questions by 1:00 pm on Wednesday, May 20, 2026.
2. Questions will include a reference to the applicable RFQ section and page number.
3. Questions received prior to the submission deadline date, Orange County School's response, and any additional terms deemed necessary by OCS will be posted in the form of an addendum by 2:00 pm on Wednesday, May 27, 2026.
4. No information, instruction, or advice provided orally or informally by any OCS personnel, whether made in response to a question or otherwise regarding this RFQ, shall be considered authoritative or binding. Firms shall be entitled to rely only on written material contained in an addendum to this RFQ.
5. Address any questions via email to:
  - a. Email subject line: **Stanback HVAC RFQ**  
Melanie Gartrell, Director of Construction & Capital Planning  
Melanie.gartrell@orange.k12.nc.us

## **Selection and Award Process**

A selection committee will evaluate statements of qualification. The committee may include administrators, school staff, Board of Education, and community members. A short list of firms deemed to be the most highly qualified for the proposed project(s) will be identified by the selection committee. Shortlisted firms may be invited to participate in an oral presentation and interview to determine which team is the best qualified to work with the district and community in completing the project(s). The district may request additional information from firms on the short list prior to interviews. If deemed beneficial some members of the selection committee may visit completed projects prior to the final selection recommendation and approval.

The recommendation of the selection committee will be subject to a successful contract negotiation and approval by the Board of Education. If an agreement cannot be reached, the district reserves the right to negotiate with other qualified firms.

## **Selection Criteria**

Finalists for contract consideration by the district will be selected based on qualifications and demonstrated competence as evidenced by the information presented in the qualifications submittal. Evaluation of qualifications may include, but not limited to the following:

1. The Proposer's understanding of the educational environment related to the project and qualifications to complete the services required.
2. The Proposer's previous experience, qualifications and competence on educational facility projects of similar size and scope.
3. Past performance on similar projects, and as indicated from reference contracts.
4. Experience and qualifications of personnel assigned to the project.
5. Methodology used to achieve technical, management and project control.
6. Ability to communicate with the selection committee both in written format and verbally.

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**Schedule and Deadlines**

1. A PDF of the submittal should be emailed to Melanie Gartrell at melanie.gartrell@orange.k12.nc.us by the deadline below.
2. The submittal should have the following on the cover page:

**Statement of Qualifications  
RFQ#OCS 26-05-06\_Mechanical  
Engineering Design Services**

**Melanie Gartrell  
Orange County Schools  
Construction and Capital Planning  
123 E. Oakdale Dr.  
Hillsborough, North Carolina, 27278**

3. The following schedule is anticipated to select firms for these projects:

RFQ Issued/Advertised:	May 6, 2026
RFQ Questions Due:	May 20, 2026
RFQ Questions Answered:	May 27, 2026
RFQ Package Due:	June 3, 2026 at 2:00pm
Selection for Services:	Expected by June 17, 2026

**Contact Policy**

Until a contract resulting from this RFQ 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 OCS, or any employee, agent or other representative of the OCS unless required by law.

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**ATTACHMENT A**

**Orange County Schools**

***Minority Business Enterprise Participation in Construction and Purchase Contracts***

**Orange County Schools Board of Education Policy Number 9125**

It is the policy of the Board to provide minorities equal opportunity to participate in all aspects of the school system's contracting and purchasing programs, including but not limited to participation in procurement contracts for materials, supplies and equipment, and contracts for the construction, renovation or repair of school facilities and equipment.

It is further the policy of the Board to prohibit discrimination against any person or business enterprise on the basis of race, color, ethnic origin, sex, handicapping condition, or religion and to conduct its contracting and purchasing programs so as to prevent such discrimination.

It is the policy of the Board in concert with other local, state and federal agencies and with the assistance of minority groups and agencies, actively to seek and identify qualified minority business enterprises (MBEs) and to offer them the opportunity to participate and to encourage them to participate, in the school system's contracting and purchasing programs. Under this policy, the Board adopts the definition of MBEs contained in G.S. 143-128.2.

It is not the policy of this Board to provide information or other opportunities to minority business enterprises that will not be available to all other business enterprises. It is the intent of this policy to establish procedures designed to assure MBEs access to information and opportunities available to other business enterprises.

It is not the intent of this policy to establish procedures that will increase the cost of the school system's construction and purchasing programs. It is the intent of this policy to widen opportunities for participation, to increase competition, and to reduce costs.

The Board will award public building contracts without regard to race, religion, color, creed, national origin, sex, age, or handicapping condition, as defined in G.S. 168A-3.

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**LEGAL NOTICE**

REQUEST FOR QUALIFICATIONS: Orange County Schools has issued an RFQ for Mechanical Engineering Design Services for A.L. Stanback Middle School. Submittal due date/time: June 3, 2026, at 2:00 p.m. For Legal Notice and RFQ information, go to <https://www.orangecountyfirst.com/our-district-main/operations-facilities/bids-requests-for-proposals-and-quotes>. Issue date 05-06-26.