



Town of Holly Springs

REQUEST FOR QUALIFICATIONS

RFQ# 26-25011

Consulting Services for Strategic Asset Management Plan

ISSUE DATE: August 11, 2025

DUE DATE and TIME: September 15, 2025 by 2:00 p.m.

Prepared by
Holly Springs Utilities & Infrastructure Services Department
June 2025
Holly Springs, North Carolina

I. PURPOSE

The **Town of Holly Springs (Town)** is seeking a Statement of Qualifications from a Professional Consulting Firm for development of the Town's **Strategic Asset Management Plan**.

II. BACKGROUND

Holly Springs is a global biomanufacturing hub located in Wake County, NC, the third fastest growing county in the country. Located approximately 10 miles from Raleigh and Research Triangle Park, minutes from RTP airport and three tier one research universities, Holly Springs boasts an ecosystem encompassing infrastructure, diverse talent, affordability, and quality of life.

III. SCOPE OF WORK AND PROJECT DESCRIPTION

Work will include development of the Town's Asset Management Strategy and Policy, assist with developing a Life Cycle Modeling Solution, and develop comprehensive reporting and preventative maintenance on all asset types, including but not limited to: facilities, utilities, parks, stormwater, and streets.

The successful firm will provide the following services:

Phase 1: Asset Management Strategy and Policy Development

- a. **Gap Analysis:** Assessing the current asset management program and identifying the necessary improvements or steps to reach the desired asset management goals.
- b. **Asset Management Policy Development:** Creating formal policies that define how assets should be managed within the organization, which would establish clear governance and operational guidelines.
- c. **Asset Management Strategy Development:** Crafting a comprehensive strategy that outlines how assets will be managed, including objectives, timelines, and approaches.
- d. **Governance and Plans Development:** Setting up frameworks, processes, and procedures that ensure the asset management program is sustainable and continually improves over time.

Phase 2: Life-Cycle Modeling Development

- a. This service involves establishing a Life-Cycle Modeling tool. The goal is development of a planning tool to model the life cycles of various asset types and funding scenarios. The solution should be designed in a way to ultimately be maintained and utilized by the Town asset management professionals and staff internally.
 - i. Asset data factors may include replacement costs, condition, life-expectancy, age, critically, repair history, budget scenarios, planned treatments and projects.
 - ii. The solution may be one that your firm can implement in-house using your own tools and capabilities, or one where you can assist the Town with the selection and implementation of a third-party software solution.

Phase 3: Implementation of High-Priority Items

- a. From Gap Analysis in Phase 1, the Town would like to begin the practical application of the most critical improvements to ensure the asset management system is functional and starts delivering results quickly.

- i. The Town will identify and prioritize specific items from Phase 1 for which it seeks assistance. The Town reserves the right to accept or reject this consultant for any or all future services under this phase.

Phase 4: Comprehensive Reporting and Preventative Maintenance

- a. **Comprehensive Reporting:** Develop a robust reporting system that can merge data from multiple sources (systems, databases, etc.) to create a unified view of the organization's asset landscape. The goal is to provide the management team with non-proprietary software that gives user-friendly access to complete and up-to-date information for data driven decision-making.
- b. **Preventative Maintenance:** The firm will assess the maintenance and operational needs of different asset types, including comparing industry standards for maintenance schedules and inspection practices with the organization’s current processes. Recommend preventative maintenance schedules that will be implemented into our CityWorks software that balances industry standards with Town resource availability to ensure assets are properly maintained, reducing downtime and extending asset life. Additionally, staffing requirements for effective maintenance will be evaluated.

Each of these services is critical to building a long-term, sustainable asset management program that maximizes the value of the organization's assets while minimizing risks and inefficiencies.

IV. PROCUREMENT SCHEDULE

The following table shows the schedule of events for the conduct of this solicitation. Details for some of the events are described in subsequent sections. All dates are subject to change.

DATE / TIME	EVENT
August 11, 2025	Issuance of Solicitation
August 29, 2025 by 4:00 p.m.	Deadline to Submit Questions
By September 9, 2025	Town to Post Answers to Questions (if any)
September 15, 2025 by 2:00 p.m.	Statement of Qualifications Submission Deadline
September 16 – September 26, 2025	Evaluation Committee Review
September 29 – October 10, 2025	Interviews conducted, if necessary
November 2025	Contract Award

V. STATEMENT OF QUALIFICATIONS SUBMISSION INSTRUCTIONS

Format

Responses shall be submitted in a single, digital PDF file and contain the content described below. The file should be a maximum of 15 pages in length, not including the cover letter or authorized appendices detailed in the content section. Please use size 11 point or larger font for readability.

Content

Responses must satisfy the criteria outlined below to be responsive to this solicitation. Any modifications or enhancements proposed beyond the identified scope of work outlined in this document must be clearly identified. The successful Consultant must demonstrate previous similar project expertise, working knowledge of the Town, technical capabilities of the proposed staff, and a solid understanding of the proposed scope of work and issues. The Consultant must also possess

sufficient technical and staff availability to complete the project within the expected timeline.

- **Cover Letter** [no more than one (1) page]
Provide the legal name, address, and telephone number of the firm along with the designated contact's name, title, email address and telephone number. Provide with the type of business entity (Corporation, partnership, sole proprietor, etc.) and the year the business was established. Provide the location in which most of the work will be executed and managed. Provide the same information for each subconsultant or each member of a joint venture, if applicable. Include a statement attesting to the submittal's accuracy and signed by an individual authorized to execute binding legal documents for the firm. Communicate your understanding of the scope and a brief description of your approach to performing the requested services.
- **Qualifications and Experience of the Consultant's Firm(s)**
Please describe the prime Consultant's recent experience relevant to this project. Provide 3 similar projects completed by the proposed project team within the past two years, as appendices. Include brief project profiles with project reference contact information for each profile. Place emphasis on projects managed by the key personnel proposed for this project.
- **Qualifications and Experience of Key Staff**
Identify key individuals (task leaders) to be assigned to this project and include the qualifications and expected responsibilities of each of the identified individuals. Provide experience summaries of key individuals, placing emphasis on previous experience with similar projects in similar roles. Resumes of key individuals, including licensure information if applicable, should be included in the appendices and will not be counted in the response page limitation.

For each subconsultant or each member of a joint venture, please include a brief description of relevant experience and qualifications. Describe what work and the percentage of work will be shared with a subconsultant or other business entity

- **Project Approach/Work Plan**
This section should include a detailed description of the proposer's understanding of the intent, objectives, and overall approach to the project to deliver services in an effective, timely, and professional manner. Describe the firm's project management, coordination, and quality control procedures. The project approach must identify whether subconsultants/firms will be utilized and the subconsultants to be used. The proposer should identify the level of assistance required from the Town and/or project partners to complete each task.
- **Schedule**
The schedule should show all milestones, critical stakeholder/public meetings, and deliverables to maintain project progress by the project end date.
- **Appendices**
Appendices to include the following (pages will not be counted in the response page limitation):
 - Copy of engineering firm license to practice in North Carolina, if applicable
 - Resumes of key individuals, including licensure information, if applicable
 - Three (3) references to previous work (similar to this proposed work) along with key contacts. If possible, add hyperlinks to past projects.
 - Certificate of insurance evidencing that all coverages, limits, and endorsements

required herein are maintained and in effect:

- Professional Liability Insurance greater \$5M per occurrence, and per aggregate. OR an umbrella policy of \$5M plus general commercial liability of \$2M aggregate/\$1M per occurrence
- Commercial General Liability
- Automobile Liability
- Worker's Compensation within statutory limits
- Employer's Liability
- (Optional) Standard contract language or general conditions that the firm seeks to incorporate.

No work product, design, or costs/fees specific to this project may be submitted. Failure to meet the requirements listed in this section may deem the submission as non-responsive and be removed from consideration.

Contact Information for Response Submissions:

Firms should submit one (1) navigable PDF file electronically via email to the contact listed below by the response due date. Please reference the solicitation name and number in the email's subject line. Upon receipt, all responses and support materials become the property of the Town and are subject to public record. Responses received after this deadline will not be considered.

To: Purchasing Division, purchasing@hollyspringsnc.gov
Subject: RFQ 26-25011 Strategic Asset Management Plan

Contact Information for Questions:

Respondents may submit all questions, in writing, to the contact listed below by the deadline provided in the procurement schedule. When submitting questions, please reference the solicitation name and number, as well as the page and section, if applicable.

Theresa Randall, Asset Management/ADA Coordinator, Theresa.randall@hollyspringsnc.gov

Questions submitted after the deadline do not require a response, though the Town will make reasonable efforts to provide clarification before the response deadline, if possible. Apart from question submissions, respondents should refrain from contacting Town staff prior to the response deadline.

Addenda

Responses to question submissions and addenda (if applicable) will be posted on the Town of Holly Springs website at the following hyperlink: <https://www.hollyspringsnc.gov/2456/Bids-Requests-for-Proposals>

It is suggested that you sign up for email updates at the bottom of this page to ensure you receive all relevant information, as it is posted. It is the respondent's responsibility to ensure they have received, reviewed, and understand all posted addenda.

VI. EVALUATION CRITERIA

Responses will be reviewed by an Evaluation Committee designated by the Town and per the evaluation criteria defined below:

- **Relative Experience (35%)**
Demonstrated relative experience to the scope of work listed in this solicitation. Experience completing similar projects provided in the response.
- **Qualifications (30%)**
Qualifications of the firm and personnel assigned to this project, demonstrating the Consultant's capacity to complete requested scope of work services.
- **Overall Project Understanding and Approach (30%)**
Demonstrated overall project understanding and an outlined project approach that demonstrates the ability and commitment to ensuring a successful project.
- **References (5%)**
References to previous similar work.

VII. SELECTION

Firms will be selected on the basis of demonstrated competence and qualification for the services required and in accordance with Chapter 143, Article 3D of the North Carolina General Statutes. The Town encourages minority firm participation. A resident firm, defined as a firm that has paid unemployment taxes or income taxes and whose principal place of business is located in the state of North Carolina, shall be granted a preference over a nonresident firm. No project-specific work product, design, or costs/fees, with the exception of unit price information, will be considered as part of the selection process.

VIII. CONTRACT AWARD

Upon completion of response evaluations and potential interviews, if the Town has determined a suitable candidate, a contract will then be negotiated at a fair and reasonable fee with the best qualified firm. If a contract cannot be negotiated with the best qualified firm, negotiations with that firm shall be terminated and initiated with the next best qualified firm. The Town intends to use its standard contract, and a sample contract is available for review upon request to Lindsay.goldstein@hollyspringsnc.gov. All respondents will be notified of the contract award decision via email after the Town Council awards the contract.

It is anticipated that a recommendation will be forwarded to the Town Council for a contract award in October 2025. The awarded firm is expected to begin work upon receipt of the notice to proceed shortly after.

IX. TOWN'S RIGHTS AND OPTIONS

The Town reserves the right, at the Town's sole discretion, to take any action affecting this solicitation, this solicitation process, or the services or facilities subject to this solicitation, that would be in the best

interests of the Town, including:

- To supplement, amend, substitute, or otherwise modify this solicitation, including the schedule, or to cancel this solicitation, at any time;
- To require any respondent to supplement or clarify its submission or provide additional information relating to its response;
- To investigate the qualifications, experience, capabilities, and financial standing of each respondent submitting a response;
- To waive any defect or irregularity in any response received;
- To reject any or all responses;
- To share the responses with Town employees, as deemed necessary by the Town;
- To award all, none, or any part of the services and enter into contracts with one or more of the respondents deemed by the Town to be in the best interest of the Town, which may be done with or without re-solicitation;
- To discuss and negotiate with any respondents their response terms and conditions, including but not limited to financial terms; and
- To terminate discussions and negotiations with any respondent at any time and for any reason.

Accuracy of Solicitation and Related Documents

Each respondent must independently evaluate all information provided by the Town. The Town makes no representations or warranties regarding any information presented in, or otherwise made available during this procurement process, and assumes no responsibility for conclusions or interpretations derived from such information. Additionally, the Town will not be bound by or responsible for any explanations or conclusions regarding this or any related documents other than those provided by an addendum issued by the Town. Respondents may not rely on any oral statement by the Town or its agents, advisors, or consultants.

If a respondent identifies potential errors or omissions in this or any other related documents, the respondent should immediately notify the Purchasing Manager of such potential discrepancy, in writing. The Town may issue a written addendum if it determines correction is necessary.

Expense of Solicitation Process

The Town accepts no liability and respondents will have no actionable claims for reimbursement of any costs or expenses incurred while participating in this solicitation process. This includes expenses and costs related to response submission, submission of written questions, interview attendance, contract negotiations, or activities required for contract execution.

X. DISCLOSURES

Confidentiality

Responses to the solicitation will become public records and, therefore, will be subject to public disclosure. However, North Carolina General Statutes Section 132-1.2 provides a method for protecting some documents from public disclosure. If the respondent follows the procedures prescribed by those statutes and designates a document confidential or trade secret, the Town will withhold the document from public disclosure to the extent that is entitled or required to do so by applicable law.

Equal Employment Opportunity

The Town does not discriminate in administering any of its programs and activities. The selected respondent will be required to ensure that it has adequate protections in its employment practices and subcontracting work such that no person shall be denied employment, fair treatment or be discriminated against on the basis of race, gender (including sexual orientation), religion, age, national origin, or handicap.

Minority/Women/Small Business Enterprise

It shall be the practice of the Town to provide minority-owned, women-owned, and small business enterprises (collectively "M/W/SBE") as well as other responsible vendors with fair and reasonable opportunity to participate in the Town's business opportunities including but not limited to employment, construction development projects, and material/services consistent with the laws of the State of North Carolina. The policy of the Town prohibits discrimination against any person or business in pursuit of these opportunities on the basis of race, color, national origin, religion, sex, age, disability, or veteran status. It is further the policy of the Town to conduct its contracting and procurement programs to prevent such discrimination and to resolve all claims of such discrimination.

Contracting

Any contract developed for work shall be construed and enforced in accordance with the laws of the state of North Carolina. Any controversy or claim arising because of contracting shall be settled by an action initiated in the appropriate division of the General Court of Justice in Wake County, North Carolina.

Conditions and Limitations

The Town reserves the right to reject any or all responses to the solicitation, to advertise for new responses, or to accept any response deemed to be in the best interest of the Town. A response to this solicitation should not be construed as a contract nor an indication of a commitment of any kind on the part of the Town nor does it commit either to pay for costs incurred in the submission of a response to this request or for any cost incurred prior to the execution of a final contract. The Town will reserve the right to dismiss any part or all the contracted team when, in the Town's opinion, the project is not moving as scheduled or is hindered in any way by the actions or personalities of team members.