# Request for Qualifications (CM at Risk Contract)
## State of Ohio Standard Forms and Documents

**Administration of Project:** School District Board + OFCC

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|---|---|---|---|
| Project Name | CMSD Segment 7 Projects | Response Deadline | August 3, 2015 4:00 PM local time |
| Project Location | New JFK High School and New Charles Eliot K-8 Group B | Project Number | TBD |
| City / County | Cleveland / Cuyahoga | Project Manager | Bill Courson |
| Owner | Cleveland Municipal School District | Contracting Authority | School District Board + OFCC |
| Delivery Method | CM at Risk | Prevailing Wages | None |
| No. of paper copies requested (stapled, not bound) | 0 | No. of electronic copies requested via email (PDF) | 1 |

Submit the requested number of Statements of Qualifications (Form F110-330) directly to Sarah Haight at sarah.haight@ofcc.ohio.gov. See Section G of this RFQ for additional submittal instructions.

Please submit all questions regarding this RFQ in writing to Sarah Haight with the project number included in the subject line (no phone calls please). Questions will be answered and posted to Opportunities page on the OFCC website at http://ofcc.ohio.gov on a regular basis until one week before the response deadline. The name of the party submitting a question will not be included on the Q&A document.

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**Project Overview**

**A. Project Description**

Professional design services are being acquired by the Contracting Authority under separate contracts.

The Program of Requirements ("POR") will be developed as a part of this project by the Architect/Engineer.

The Project will utilize OHG as the Owner's Agent.

All aspects of the project and related issues will be implemented and operated consistent with the Contracting Authority and/or Owner's policies and procedures.

**GROUP B: New JFK High School** *and* **New Charles Eliot K-8**
*Project #1*: Build one (1) new JFK High School to house 800 students in grades 9-12.
The building is to be approximately 132,800 sf. built in accordance with the Ohio School Design Manual.
The new building is planned to be built at the Frederick Douglass Park (Miles Ave.) near Charles Eliot school.
Total Project Budget: $32,562,560; Estimated Construction Cost: $28,100,000.

*Project #2*: Build one (1) new Elementary/Middle School (Eliot) to house 350 students in grades K-8.
The building is to be approximately 52,849 sf. built in accordance with the Ohio School Design Manual.
It is anticipated that the new building is to be built on the existing Whitney M. Young site of approx. 24 acres.(17900 Harvard Ave.).
Total Project Budget: $13,366,604; Estimated Construction Cost: $11,500,000.

It is anticipated that some form of Educational Visioning will be undertaken early in the process.
The District will lead the process and may provide an outside consultant for the facilitation. It is expected the chosen CMRs will take part in the Educational Visioning processes.

**B. Scope of Services**

The selected Construction Manager at Risk ("CM"), as a portion of its required Scope of Services and prior to submitting its proposal, will discuss and clarify with the Contracting Authority and/or Owner, the breakdown of the Agreement detailed cost components, to address the Owner's project requirements and refine the project schedule.

As required by the Agreement, and as properly authorized, provide the following categories of services: provide constructability review comments on documents produced by the A/E during the Schematic Design, Design Development, and Construction Document stages; develop and maintain estimates of probable construction cost, value engineering, project schedules, and construction schedules; lead and manage the Subcontractor Prequalification and Bidding process, Construction and Closeout Stage.

Refer to the *Ohio School Design Manual* for additional information about the type and extent of services required for each. A copy of the standard Agreement can be obtained at the OFCC website at http://ofcc.ohio.gov.

The preconstruction and construction services are generally described below. Subcontracts including but not limited to Plumbing, Fire Protection, HVAC, Electrical and AV/Technology will be awarded by the CM to prequalified vendors using a competitive process. The parties will engage in an "open book" pricing method in which all subcontracted work shall be based upon competitive pricing that will be reviewed by the Contracting Authority and/or Owner, the A/E and the CM. The Contracting Authority and/or Owner shall have access to all books, records, documents and other data in the CM's possession related to itself, its subcontractors and material suppliers pertaining to bidding, pricing or performance of the Agreement.

Preconstruction Services: The CM will work cooperatively with the Contracting Authority and/or Owner, Commissioning Agent, A/E, and Project Team, and will provide, among other services, schedule development, estimate development, Guaranteed Maximum Price (GMP) proposal, subcontractor prequalification and bidding, constructability review, permits, budgeting, value engineering, and preconstruction planning throughout the preconstruction stages. When the drawings and specifications are at the stage of completion specified in the Agreement, such partially completed documents (the "Basis Documents") shall be provided to the CM, together with the A/E's detailed listing of any incomplete design elements and the A/E's statement of intended scope with respect to such incomplete elements (the "Design Intent Statement"). Contingent upon the Contracting Authority's approval of the GMP, the parties will enter into an amendment to the Agreement establishing the Contract Sum ("GMP Amendment"). If the proposed Contract Sum exceeds the Project Budget established for construction, then the Contracting Authority may terminate the agreement with the CM and seek proposals from other firms for completion of the Project.

Construction Services: The CM shall construct the Project pursuant to the construction documents and in accordance with the schedule requirements. The CM shall hold all subcontracts and shall be fully responsible for the means and methods of construction, project safety, project completion within the schedule agreed upon in the preconstruction phase, compliance with all applicable laws and regulations including monitoring compliance with all EDGE, equal employment, and prevailing wage requirements, and submitting monthly reports of these activities to the Contracting Authority. All subcontracts shall be on the subcontract form prescribed by OAC Section 153:1-03-02. The Contracting Authority reserves the right to approve the CM's selection of subcontractors and any supplemental terms to the form subcontract.

For purposes of completing the Relevant Project Experience Matrix in Section F of the Statement of Qualifications (Form F110-330), below is a list of relevant scope of work requirements for this RFQ:

1. OSFC Funded Projects utilizing CMR Delivery Contracts
2. Public School Projects
3. K-12 Facility Projects utilizing OAKS-CI
4. New Construction on Urban/Occupied Sites
5. Ohio Capital Improvement Process (State of Ohio Contracts and OAKS CI)
6. LEED Experience

### C. Funding / Estimated Budget

| | | | |
|---|---|---|---|
| Total Project Cost | $45,929,164 (Excluding LFIs) | State Funding | $31,231,831.52 |
| Construction Cost | $38,600,000 approx. (Excluding LFIs) | Other Funding | $14,697,332.48 |

### D. Anticipated Schedule

| | |
|---|---|
| CM Preconstruction Services Start | 10 / 15 |
| Construction Stage Notice to Proceed | 04 / 16 |
| Substantial Completion of all Work | 07 / 18 |
| CM Services Completed | 06 / 19 |

### E. EDGE Participation Goal

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|---|---|
| Percent of the CM's total compensation excluding CM's Contingency* | 5% |

*Preconstruction Stage Compensation plus Contract Sum minus CM's Contingency

### F. Evaluation Criteria for Selection

Selection Criteria: The CM will be selected using (i) qualifications-based process during the Request for Qualifications (RFQ) stage to develop a short list and (ii) best value process during the Request for Proposal stage. The qualifications-based criteria for the RFQ is included in this announcement. The best value criteria used in evaluating proposals from short listed firms will include such factors that are determined to derive or offer the greatest value to the State and Owner, combining both qualifications and fee.

Short List: Each firm responding to this RFQ will be evaluated and selected based on its qualifications and the qualifications and experience of the particular individuals identified as the candidate's proposed team for the Project. After evaluating the responses to this RFQ, the Contracting Authority will select a short list of no fewer than three candidates that it considers to be the most qualified, except if the Contracting Authority determines that fewer than three firms are qualified, it will only select the qualified firms.

Request for Proposal: The short-listed firms shall be sent a Request for Proposal ("RFP") that will invite the firms to submit pricing proposals containing their proposed preconstruction stage compensation, construction stage personnel costs, itemized construction stage general conditions costs, construction stage contingency percentage, and construction stage fee percentage. The short-listed candidates will also receive (i) form of Agreement with the Contracting Authority containing the contract terms and conditions, (ii) set of the most recent design documents and (iii) proposed Project schedule.

Pre-Proposal Meeting: Prior to submitting a response to the RFP, the short-listed firms will be invited to meet individually with the Contracting Authority and/or Owner. The purpose of the pre-proposal meeting is to permit the short-listed firms an opportunity to ask the Contracting Authority and/or Owner questions in an individual setting to help the firms prepare their responses to the RFP. The Contracting Authority will notify each short-listed firm to schedule individual times for the pre-proposal meetings.

Interview: After submitting responses to the RFP, the short-listed firms will be interviewed by the Contracting Authority and Owner. The purpose of the interview will be to meet the proposed Project team, become familiar with key personnel, and understand the project approach and ability to meet the stated objectives for the Project. Please be prepared to discuss with specificity the firm's capacity to conduct this work in compliance with the timetable, budget and EDGE expectations. The Contracting Authority will notify each short-listed firm to schedule individual times for the interviews.

Selection Schedule: Tentative schedule is subject to change.

| | |
|---|---|
| RFQ Posted and Advertised | June 30, 2015 |
| Qualifications Due | July 31, 2015 |
| RFP Issued to Short Listed Firms | Aug. 7, 2015 |
| Pre-Proposal Meeting | To Be Determined |
| Interviews | Week of September 14, 2015 |
| Selection of CM | Late September, 2015 |

Cancellation and Rejection: The Contracting Authority reserves the right to reject all proposals and cancel at any time for any reason this solicitation, any portion of this solicitation or any phase of the Project. The Contracting Authority shall have no liability to any proposer arising out of such cancellation or rejection. The Contracting Authority reserves the right to waive minor variations in the selection process.

Interested CM firms are required to address how they will implement Building Information Modeling ("BIM") on the project, experience and level of training of staff related to BIM, incorporation of team partners that have previous BIM experience, and an understanding of collaborative BIM processes, including but not limited to the *State of Ohio BIM Protocol* available at the OFCC website at http://ofcc.ohio.gov.

Interested CM firms are required to submit the Commitment to Participate in the EDGE Business Assistance Program form in its Statement of Qualifications (Form F110-330) submitted in response to the RFQ, to indicate its intent to contract with and use EDGE-certified Business Enterprise(s), as a part of the CM's team. The Intent to Contract and to Perform and / or waiver request letter and Demonstration of Good Faith Effort form(s) with complete documentation must be attached to the CM's Proposal. Both forms can be accessed via the OFCC website at http://ofcc.ohio.gov. The Intent to Contract and to Perform form is again required at the Fee Proposal stage.

For all Statements of Qualifications, please identify the EDGE-certified Business Enterprises, by name, which will participate in the delivery of the proposed professional services solicited in the RFQ.

**G. Submittal Instructions**

Firms are required to submit the current version of Statement of Qualifications (Form F110-330) available via the OFCC website at http://ofcc.ohio.gov.

Electronic submittals should be combined into one PDF file named with the project number listed on the RFQ and your firm's name. Use the "print" feature of Adobe Acrobat Professional or similar software for creating a PDF rather than using a scanner. If possible, please reduce the file size of the PDF. In Adobe Acrobat Professional, go to Advanced, then PDF Optimizer. Also, please insert the project number and firm name followed by "SOQ" in the e-mail subject line.

Statements of Qualifications are to be submitted electronically by e-mail. Submittals are to be limited to a maximum of one e-mail with the total file size of 25 MB.

Unless otherwise noted or exempt, all documents submitted to the Contracting Authority in response to this RFQ and subsequent RFP are public and will be available for inspection at the conclusion of the selection process. The following information shall remain confidential and will not be released: (1) Proposal Form(s), except for cost category subtotals which will be transferred to the Best Value Rating Form; (2) Financial Capacity; and (3) Bonding/Insurance.

Proposers are requested to submit the following information in response to this RFQ within Section H of Form F110-330.

1. Summary: Provide a summary, on one page or less, describing why your firm/team is the most qualified for the Project.
2. Bonding/Insurance: Provide evidence of capacity to provide bonding in the amount of the construction budget (e.g. a letter from your Surety agent stating that one or more Sureties will issue Bonds in the amount of the construction budget if your team is selected) and a copy of the firm's certificate of insurance showing the firm's current limits of liability for commercial general liability, employer's liability, business automobile liability, and professional liability insurance.
3. Management Systems: Describe the scheduling and cost control systems the firm would propose to use for the Project
4. Self-Performed Work: Indicate whether the firm intends to self-perform any work on the Project through a competitive process and, if so, the nature of the work and capability to self-perform.
5. Estimating: Demonstrated track record of performance of in-house estimating on projects comparable to the Project.
6. Scheduling: Demonstrated track record of performance of managing projects to the original schedule.

Firms are requested to identify professional registrations, memberships and credentials including but not limited to: LEED GA, LEED AP, LEED AP+, CCCA, CCM, CCS, CDT, CPE, DBIA, and any other appropriate design and construction industry credentials. Identify that information on the resume page for individual in Block 22, Section E of the F110-330 form.

# CM at Risk Selection Rating Form
## State of Ohio Standard Forms and Documents

Project Name: CMSD New JFK High School and New Charles Eliot K-8 Group B

Proposer Firm: _____

Project Number: SFC-TBD

City, State, Zip: _____

| Selection Criteria | | Value | | Score |
|---|---|---|---|---|
| **1. Primary Firm Location and Workload** (Maximum 10 points) | | | | |
| a. Proximity of firm to project site | Less than 50 miles | 5 | | |
| | 50 miles to 100 miles | 2 | | |
| | More than 100 miles | 0 | | |
| b. Amount of contracts awarded by Contracting Authority in previous 24 months | Less than $500,000 | 5 | | |
| | $500,000 to $2,000,000 | 2 | | |
| | More than $2,000,000 | 0 | | |
| **2. Primary Qualifications** (Maximum 40 points) | | | | |
| a. Project management lead | Experience / ability of project manager to manage scope / budget / schedule / quality | 0 - 10 | | |
| b. Project administration lead | Experience / ability to effectively administer project controls and processes | 0 - 10 | Max = 30 | |
| c. Technical staff | Experience / ability of technical staff to develop accurate estimates and schedules | 0 - 10 | | |
| d. Construction administration staff | Experience / ability of field representative to identify and solve issues during construction | 0 - 10 | | |
| **3. Key Consultant Qualifications** (Maximum 10 points) | | | | |
| a. Key consultants | Experience / ability of key consultants to perform effectively and collaboratively | 0 - 5 | | |
| b. Proposed EDGE-certified Consultant participation* | One point for every 2 percent increase in Services compensation** over the EDGE participation goal | 0 - 5 | | |
| **4. Overall Team Qualifications** (Maximum 10 points) | | | | |
| a. Previous team collaboration | Less than 3 sample projects | 1 | Max = 3 | |
| | 3 to 9 sample projects | 2 | | |
| | More than 9 sample projects | 3 | | |
| b. LEED*** Registered / Certified project experience | Registered projects | 1 | Max = 2 | |
| | Certified projects | 2 | | |
| c. BIM project experience | Training and knowledge | 1 | Max = 3 | |
| | Direct project experience | 3 | | |
| d. Team organization | Clarity of responsibility / communication demonstrated by table of organization | 0 - 2 | | |
| **5. Overall Team Experience** (Maximum 30 points) | | | | |
| a. Previous team performance | Past performance as indicated by evaluations and letters of reference | 0 - 10 | | |
| b. Experience with similar projects / delivery methods | Less than 3 projects | 0 - 3 | | |
| | 3 to 9 projects | 4 - 6 | | |
| | More than 9 projects | 7 - 10 | | |
| c. Budget and schedule management | Performance in completing projects within original construction budget and schedule | 0 - 5 | | |
| d. Knowledge of Ohio Capital Improvements process | Less than 3 projects | 0 - 1 | | |
| | 3 to 9 projects | 2 - 3 | | |
| | More than 9 projects | 4 - 5 | | |
| * Must be comprised of consulting firm(s) and NOT the lead firm<br>** Preconstruction Stage Compensation plus Contract Sum minus Subcontracted Work, Self-performed Work, and CM's Contingency<br>*** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute | | **Subtotal** | | |

**Notes:**

**Evaluator:**

Name _____

Signature _____ Date _____