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

Administration of Project: Local Higher Education

Project Name	Western Geothermal Infrastructure Ph2	Response Deadline	10/05/15	2:00 PM local time
Project Location	Miami Unversity, Western Campus	Project Number	MUN-100056	
City / County	Oxford / Butler	Project Manager	Kami Archibald	
Owner	Miami University	Contracting Authority	Local Higher Education	
Delivery Method	CM at Risk	Prevailing Wages	State	
No. of paper copies requested (stapled, not bound)	4	No. of electronic copies requested (PDF)	1	

Submit the requested number of Statements of Qualifications (Form F110-330) directly to Elizabeth Davidson at 181 Cole Service Building, 101 S. Fisher Dr., Oxford, OH 45056. See Section G of this RFQ for additional submittal instructions.

Submit all questions regarding this RFQ in writing to Kami Archibald at banninkj@miamioh.edu 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.

Project Overview

A. Project Description

Miami University is soliciting qualifications for a Construction Manager for Western Geothermal Infrastructure Phase 2 project. This project will address the infrastructure needs for connecting five (5) existing buildings onto the Western Campus geothermal system. The Site/Infrastructure/Utility schedule of work will be completed concurrent with other campus projects to ensure timely completion of the overall Western development. The infrastructure systems to be developed include: Steam/Condensate, Heating Hot Water, Chilled Water, Storm, Domestic Water, Gas, and IT.

The University introduced geothermal for heating/cooling needs for Western Campus in the first phase of this project in 2013-2014. The intent of the first phase was to enable new construction on the Western Campus to receive heating/cooling needs from the new geothermal plant and leave the existing campus buildings on the existing central heating and cooling plants. During the first phase, plans were made for future expansion of the geothermal system to convert existing buildings on Western Campus over to geothermal in subsequent phases.

The geothermal system that was installed in 2013 consists of four (4) 250-ton heat pump chillers, 315 geothermal wells, and a geothermal mat beneath a one-acre pond. This system serves the heating/cooling needs of three (3) residence halls and a dining facility.

In this phase 2 project, the existing system will be expanded to include approximately 400 additional geothermal wells resulting in 2,500 tons of available heating/cooling capacity by the geothermal plant. Provisions were made in phase 1 to include additional heat pump chillers in the existing geothermal plant. The phase 2 plans may include an expansion of the gas fired boilers to meet the needs of the additional building loads.

Several various items will be upgraded from the phase 1 project including controls, sensors, additional valves or relocation of existing valves and sensors.

The electrical needs of the phase 2 work will include another unit substation, and multiple new electrical feeds to existing buildings.

Western Campus Distribution

The current University housing plan includes a renovation of an existing residence hall that will be done in conjunction with this project and possibly include an addition to the residence hall. While this project does not contain design or construction for that building, it will be the responsibility of this project to get the necessary utilities to the project site for the building's use. Four (4) existing buildings that are not being renovated will also be added to the geothermal system in the phase 2 plan. These four (4) buildings will need to be modified to accept service from the geothermal plant.

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

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

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.

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 Facilities Construction 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 General Trades, 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, A/E and Project Team, and will provide, among other services, cost estimating, budgeting, value engineering, constructability review, scheduling and preconstruction planning throughout the preconstruction stages. When the drawings and specifications are at a 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 material incomplete design elements and the A/E's statement of intended scope with respect to such incomplete elements (the "Design Intent Statement"). The CM shall submit to the Contracting Authority and/or Owner and the A/E their proposed Guaranteed Maximum Price (the "Contract Sum") and its qualifications and assumptions based upon the Basis Documents and the Design Intent Statement. The CM, the Contracting Authority and/or Owner and the A/E (along with selected engineers and consultants) shall meet to reconcile any questions, discrepancies or disagreements relating to the qualifications and assumptions, the Basis Documents or the Design Intent Statement. The reconciliation shall be documented by an addendum to the qualifications and assumptions that shall be approved in writing by the Contracting Authority and/or Owner, the A/E and the CM. The CM shall then submit to the Contracting Authority, for approval, the CM's proposed final Contract Sum based upon the Basis Documents, the approved qualifications and assumptions and the Design Intent Statement. Contingent upon the Contracting Authority's approval of the final Contract Sum, the parties will enter into an amendment to the Agreement establishing the Contract Sum ("GMP Amendment"). The final negotiated Contract Sum shall not exceed the Project Budget established for construction. If the proposed Contract Sum exceeds such budget, then the Contracting Authority may terminate the agreement with the CM and seek from other firms, proposals 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. Demonstrated CM at Risk Experience, including State of Ohio Standard Forms and Documents.
2. Demonstrated success with complex MEP renovations in existing buildings.
3. Demonstrated success with occupied buildings under construction.
4. Demonstrated success with multi-phased projects.
5. Demonstrated ability to coordinate work around ongoing owner activities.
6. Demonstrated ability with campus utility distribution systems

C. Funding / Estimated Budget

Total Project Cost	$9,000,000	State Funding	$0
Construction Cost	$7,500,000	Other Funding	$9,000,000

D. Anticipated Schedule

CM Preconstruction Services Start	11 / 15
Construction Stage Notice to Proceed	04 / 16
Substantial Completion of all Work	07 / 17
CM Services Completed	11 / 17

E. EDGE Participation Goal

Percent of the CM's total compensation excluding CM's Contingency* 5.0%

*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.

RFP issued to the Short-Listed Firms	10/14/15
Interviews	10/28/15
Selection of CM	11/4/15

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 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 or similar software for creating a PDF rather than using a scanner. If possible, please reduce the file size of the PDF. In Acrobat, go to Advanced, then PDF Optimizer. Also, please label the CD or DVD and the sleeve with the project number and firm name if applicable.

Paper copies of the Statement of Qualifications, if requested, should be stapled only. Do not use special bindings or coverings of any type. Cover letters and transmittals are not necessary.

Facsimile copies of the Statement of Qualifications will not be accepted.

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: Western Geothermal Infrastructure Ph2
Project Number: MUN-100056
Proposer Firm: _____
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 25 miles	5		
	25 miles to 50 miles	2		
	More than 50 miles	0		
b. Amount of contracts awarded by Contracting Authority in previous 24 months	Less than $500,000	5		
	$500,000 to $1,000,000	2		
	More than $1,000,000	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 2 sample projects	1	Max = 3	
	2 to 6 sample projects	2		
	More than 6 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 2 projects	0 - 3		
	2 to 6 projects	4 - 6		
	More than 6 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 5 projects	0 - 1		
	5 to 8 projects	2 - 3		
	More than 8 projects	4 - 5		
* Must be comprised of consulting firm(s) and NOT the lead firm ** Preconstruction Stage Compensation plus Contract Sum minus Subcontracted Work, Self-performed Work, and CM's Contingency *** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute		**Subtotal**		

Notes:

Evaluator:

Name _____

Signature _____ Date _____