OFCC Updates: OAKS CI

Steve Mayo

OAKS CI Manager

Updates

- OAKS CI is committed to increasing the functionality and usability of our system.

Accessibility

- System not easily accessible
  - Our K12 system is currently being migrated to the cloud.
  - This migration will allow you to access OAKS CI from any browser and will no longer limit you to IE 7-9.

Cumbersome Processes

- Contract SOV
  - It can take a long time to enter a Contract Schedule of Value.
  - Decreased the amount of WBS Codes.

Cumbersome Processes

- Applications for Payment
  - The Contract Schedule of Values utilizes an import template, however, the application for payment does not allow for the import option.
  - Our team is working diligently with Oracle in order to allow for this option and we will keep you posted on our progress.

Functionality Obstacles

- Change Orders
  - If a change order in OAKS CI contains a **negative value**, it will lock the Contract SOV. This lock will not allow **applications for payment** to be created **until** the change order has been approved or rejected.
  - We are currently piloting a new short erm fix. This process will allow the change order to be routed via DocuSign without impacting the SOV in OAKS CI thus no longer locking the Contract SOV while we are awaiting change order approval.

DocuSign

- DocuSign electronic signature application has been implemented for Contracts, Agreements, Contract Modifications including Change Directives and amendments, however, LFI DocuSign process has **not yet** been implemented

DocuSign Process

- DocuSign workflow replaces the OAKS CI steps used to route documents for signature and eliminates the printing, signing, scanning, uploading and attaching process
- The DocuSign document is secure and cannot be modified once signed
- The OFCC Project Coordinator will load the executed document into OAKS CI which approves the OAKS CI record

OAKS CI Cloud Upgrade to 16.1

- The OAKS CI cloud based system upgraded to v16.1 on June 17. This was a major upgrade and involved both new functionality and the movement of the application to new state-of-the-art hardware.

OAKS CI Cloud Upgrade to 16.1

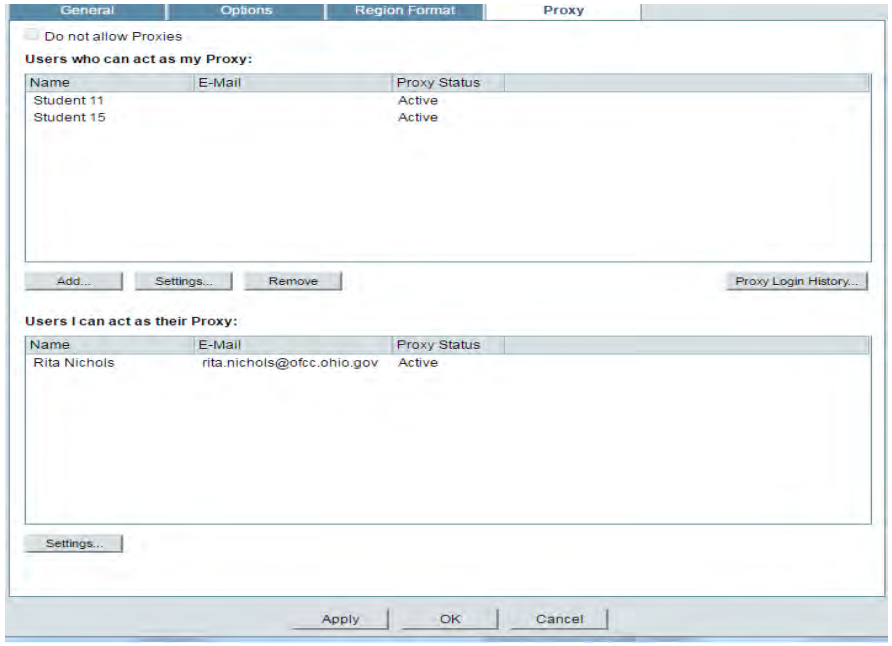
- If you are a cloud-based user, you received a new password from Oracle with a link to a website which allowed you change your password and set security questions:
  - OAKS CI Password: https://ohio-primavera-idm.oracleindustry.com/oim
- You also received a new link from us which provides you access to the OAKS CI (Cloud) site:
  - OAKS CI : https://ohio-unifier.oracleindustry.com/bluedoor

OAKS CI Cloud Upgrade to 16.1

- You also received a new link from us which provides you access to the OAKS CI (Cloud) site:
  - OAKS CI : https://ohio-unifier.oracleindustry.com/bluedoor

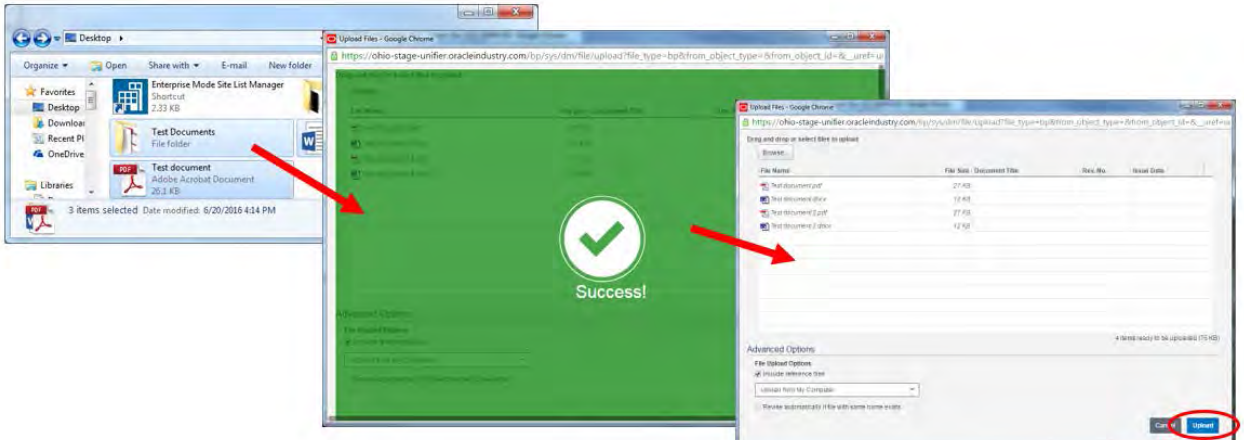
OAKS CI Cloud Upgrade to 16.1

- Upgrade impact
  - You now have the ability to assign multiple users as your proxy



OAKS CI Cloud Upgrade to 16.1

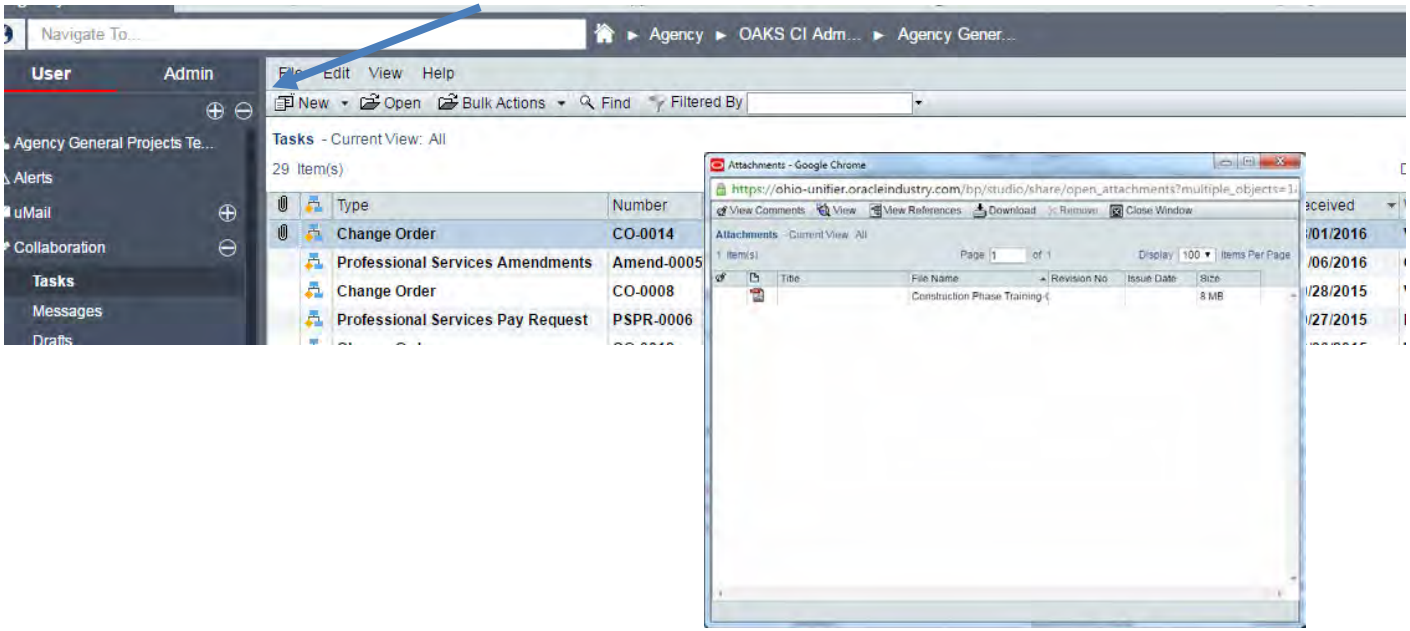
- You can now drag and drop documents from your desktop to your folders in document manager
  - Locate your documents on your computer
  - Drag them into the upload screen, which will turn green
  - Click Upload



OFCC Conference

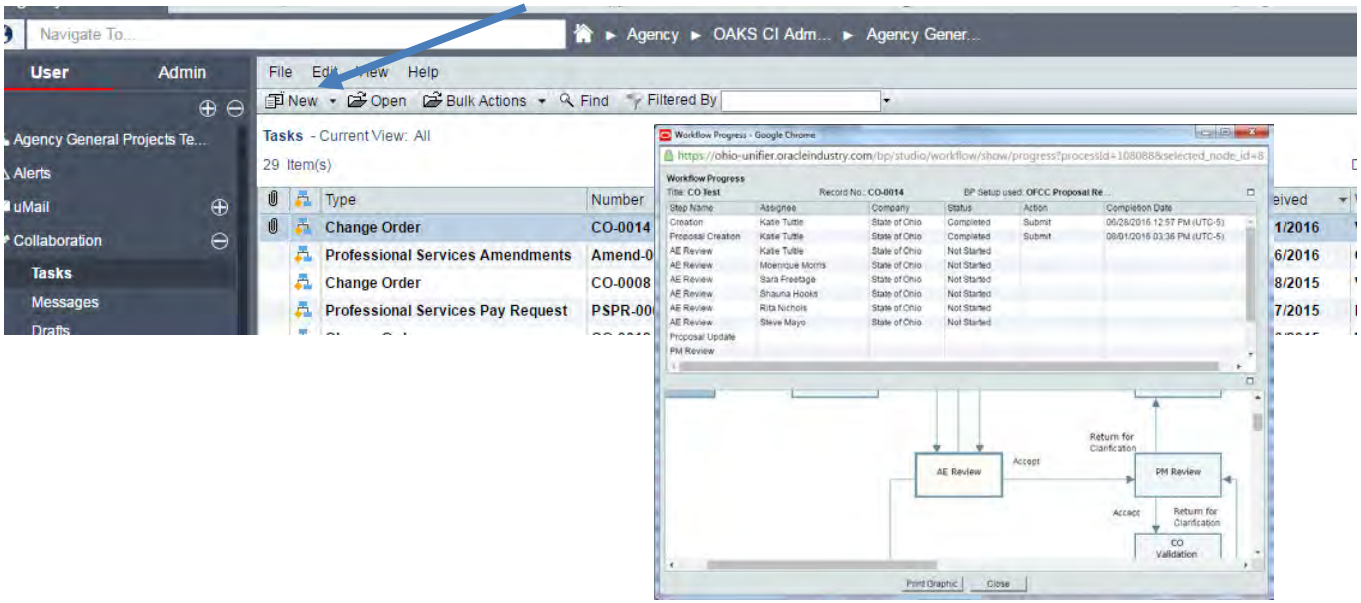
OAKS CI Cloud Upgrade to 16.1

- Upgrade impact-
  - From your Task list you can now click on the paper clip next to the task to view attachments



OAKS CI Cloud Upgrade to 16.1

- Upgrade impact-
  - From your Task list you can now click on the flow chart and view current step of the workflow



Questions?

Contact our Customer Support Team:

oaksci@ofcc.ohio.gov, 614-644-2211

OFCC Updates: LEED

Lisa A. Laney, LEED AP, BD+C
Sustainability Administrator

@OHFacilities / #OFCConf16

OFCC Conference

There are 374 schools in Ohio registered or certified with the US Green Building Council showing Ohio's commitment to energy efficient, environmentally friendly & healthy schools!

Akron - NIHF

Bellevue Elementary

273 LEED Certifications

Barberton Elementary West

Platinum – 3

Gold – 86

Silver – 178

Certified – 6

LEED V3

- Registration
- Eco-Charrettes

MIDVIEW MIDDLE SCHOOL
MIDVIEW LOCAL SCHOOL DISTRICT

MIDVIEW MIDDLE SCHOO
MIDVIEW LOCAL SCHOOL DISTRIC

- Energy Requirements
  - Addendum
- Submittals

V3 Registration: October 31, 2016
Sunset: June 30, 2021

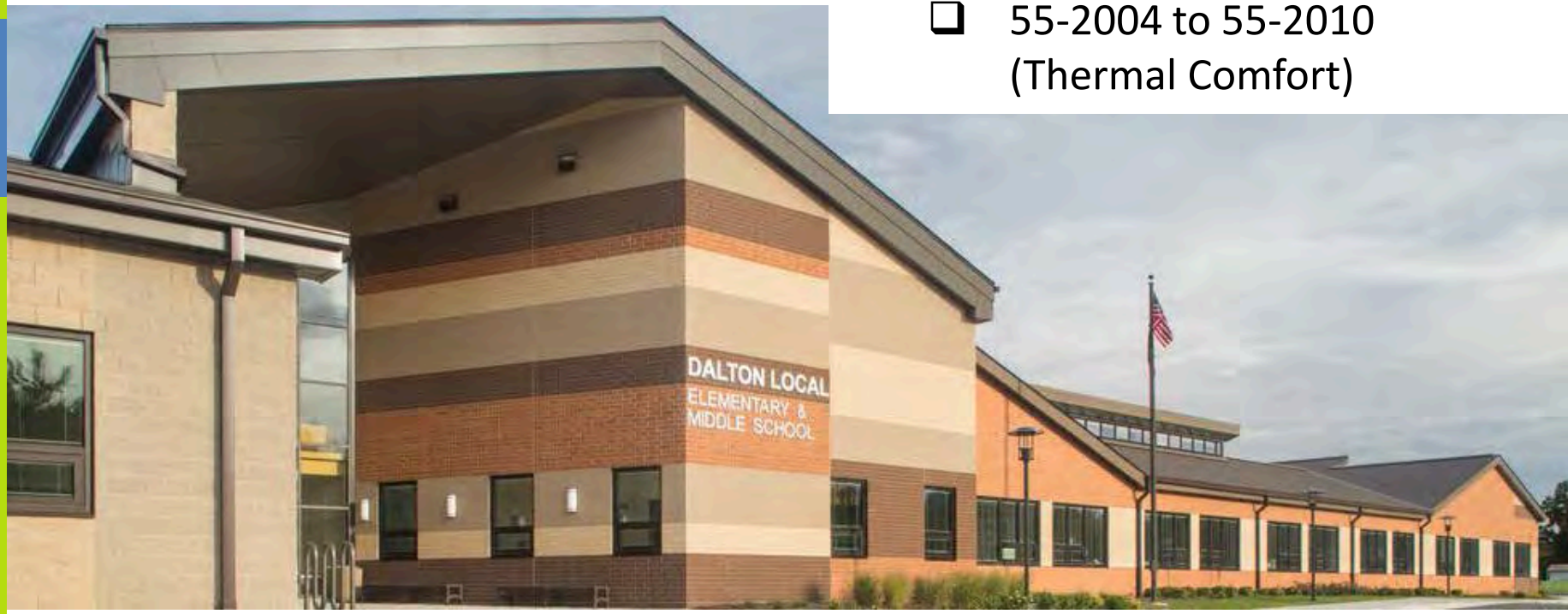
MIDVIEW MIDDLE SCHOOL
MIDVIEW LOCAL SCHOOL DISTRICT

LEED V4 - Significant Updates

- Upfront Planning
- Integrative Design Process

ASHRAE Standards

- ❑ 90:1-2007 to 90:1-2010 (Energy)
- ❑ 62:1 2007 to 62:1 2010 (Ventilation)
- ❑ 55-2004 to 55-2010 (Thermal Comfort)



LEED V4 - Significant Updates

- Credit Revisions
  - L&T - New Category
  - Credits Combined

Dalton LSD ES/MS

OFCC & GBCI – Working Together on LEED for Schools V4

OFCC Reviewing Sustainability Goals of V4

- Do they still match the goals of Ohio Schools?
- Is there an increased project cost with V4?

Cleveland MSD – Almira PK-8

Education!

Education!

Education!

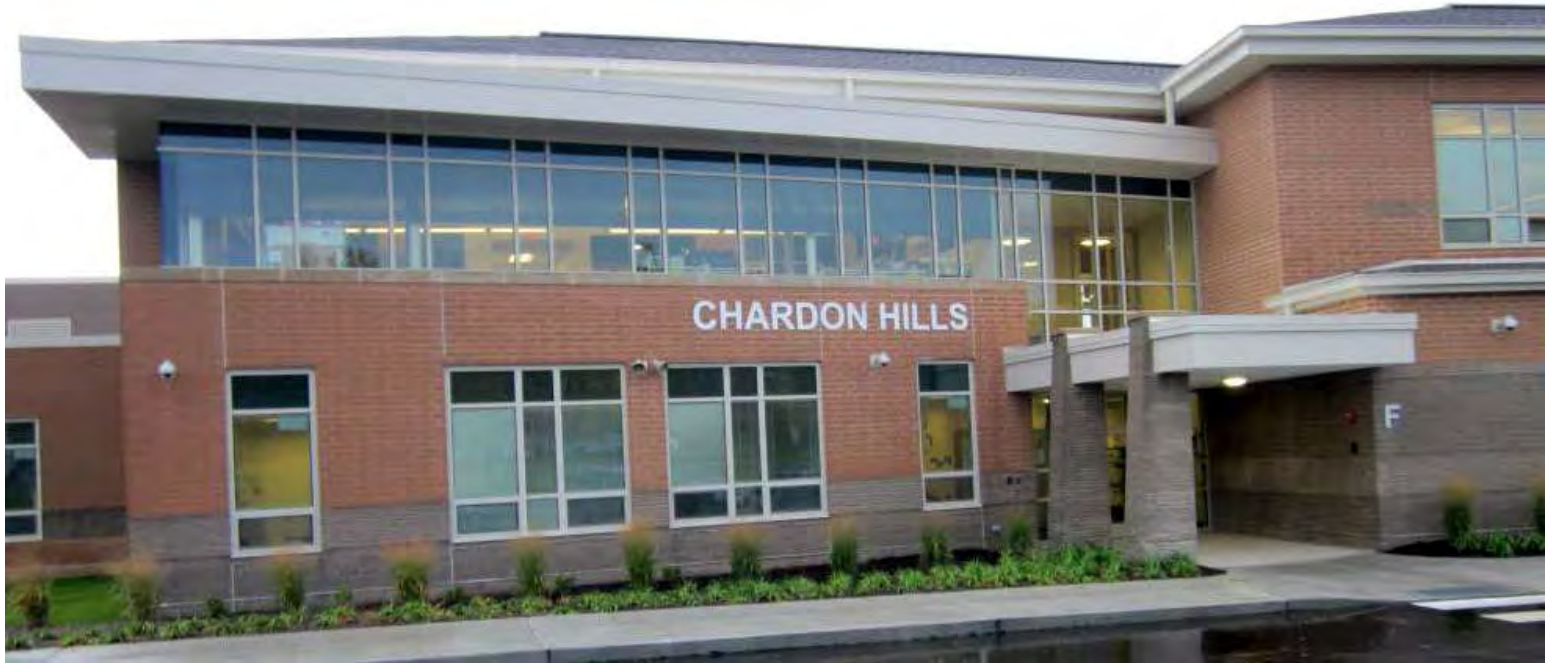
Euclid CSD – Bluestone ES (above) & Shoreview ES (left)

Questions, Input or Opinions on V4?

Lisa Laney, LEED AP BD+C

Sustainability Administrator

lisa.laney@osfc.ohio.gov (LEED Online Account)



Questions, Input or Opinions on V4?

Lisa Laney, Sustainability Administrator

lisa.laney@osfc.ohio.gov

OFCC Updates: Documents

Lane Beougher

Program Services Manager

Joint Ventures and LLCs

- Affected documents:
  - Architect/Engineer Agreement Forms
  - A/E Standard Terms and Conditions
  - Instructions to Bidders (Contractor)
  - Instructions to Proposers (CM/DB)
  - Agreement Forms (Contractor/CM/DB)
  - General Conditions (Contractor/CM/DB)

A/E Agreement Form (AHE/JV)

5.1.3 Subject to **Section 5.1.1**, the Agreement shall become binding and effective upon execution by the Contracting Authority, Owner, A/E, and Ohio Attorney General.

5.1.3.1 If the A/E is a joint venture, **(1)** each individual joint venturer shall **(a)** sign the Agreement in its own name and **(b)** be a party to the Contract, and **(2)** the Contract shall be binding on and apply to all joint venturers <u>jointly and severally</u>.

A/E Agreement Form (K-12/LLC)

5.1.3 Subject to **Section 5.1.1**, the Agreement shall become binding and effective upon execution by the School District Board and A/E, subject to approval of the Commission.

5.1.3.2 If the A/E is a LLC, which the Contracting Authority reasonably believes to be a special purpose or similar entity, the Contracting Authority may, in its sole discretion, require the LLC and each member of the LLC to **(1)** sign the Agreement in its own name and **(2)** be a party to the Contract. In that case, the Contract shall be binding on and apply to the LLC and all of its members jointly and severally.

A/E Standard Terms & Conditions

7.2.6.5 If the A/E is a joint venture:

.1 the A/E may meet the requirements of this **Section 7.2.6** by providing a PL policy under which each joint venturer is the insured; or

.2 each joint venturer shall individually meet the requirements of this **Section 7.2.6** by providing a PL policy **(1)** under which the individual is the insured and **(2)** that covers that joint venturer's interests in the joint venture by endorsement or otherwise. The certificate of insurance shall reflect that the PL policy covers the joint venturer's interest in the joint venture.

Instructions to Proposers (CM/DB)

3.6 Contract Negotiation Submissions

3.6.1 The Proposer with whom the Contracting Authority is negotiating shall submit the following documents to the Contracting Authority within five days after commencement of contract negotiations:

3.6.1.10 If the Proposer is a joint venture, the executed agreement between the joint venturers describing the division of services/work and percentage of contract for each company, and a Power of Attorney which authorizes one or more individuals to bind the joint venture and each individual joint venturer to Contract Modifications including GMP Amendments.

Additional Revisions

- Consultant Markup
- GMP Amendment Form revisions
- Domestic Steel
- Commercially useful function (EDGE)
- Communication with A/E's Consultants
- Electronic signatures
- Allowances and Unit Prices
- Sustainability Requirements

A/E and Consultant Markup

(A/E Agreement Form)

2.3 Additional Services Fees.

2.3.1 For Additional Services provided by the A/E and all Consultants, the Owner shall pay the A/E Additional Services Fees of up to **$«insert amount of Additional Services Fees»**, which shall not be exceeded without the prior written approval of the Contracting Authority and Owner, and an amendment to this Agreement. For Additional Services performed by a Consultant, Additional Services Fees shall be based on the Consultant's associated invoices to the A/E, and may include an A/E mark-up of «insert percentage» percent. Additional Services Fees are subject to the following allocation:

Description of Additional Services	NTE/LS*	Associated Fee
Change Order Fee Allowance at «insert %» percent	NTE	$«insert fee amount»
Special Inspections	«NTE/LS»	$«insert fee amount»
Geotechnical Investigation	«NTE/LS»	$«insert fee amount»
«insert description»	«NTE/LS»	$«insert fee amount»
«insert description»	«NTE/LS»	$«insert fee amount»
«insert description»	«NTE/LS»	$«insert fee amount»
«insert description»	«NTE/LS»	$«insert fee amount»
«insert description»	«NTE/LS»	$«insert fee amount»
Total Additional Services Fees		**$«insert fee amount»**

* NTE = Not to Exceed Amount / LS = Lump Sum

2.4 Reimbursable Expenses.

2.4.1 For Reimbursable Expenses incurred by the A/E and all Consultants, the Owner shall pay the A/E up to **$«insert amount of Reimbursable Expenses»**, which shall not be exceeded without the prior written approval of the Contracting Authority and Owner, and an amendment to this Agreement. No A/E or Consultant mark-up shall be permitted on Reimbursable Expenses. Reimbursable Expenses are subject to the following allocation:

A/E and Consultant Markup

6.2 Additional Services Fees (A/E Standard Terms and Conditions)

6.2.1 The Owner shall pay the A/E the Additional Services Fees for the associated Additional Services, when those Services are performed in accordance with the Agreement.

6.2.1.1 For Additional Services performed by a Consultant, the Additional Services Fees shall be based on the Consultant's associated invoices to the A/E and may include an A/E mark-up negotiated between the Contracting Authority and A/E.

6.2.2 For Additional Services authorized by the Contracting Authority in connection with Change Order Work, the A/E shall be compensated at the prescribed rate of the additional construction cost up to the amount of the Change Order Fee Allowance. There shall be no fees for approved Change Orders processed as a result of errors and/or omissions on the part of the A/E or decreases in construction cost.

6.2.3 Except for the Additional Services and Additional Services Fees listed above, Additional Services and any Additional Services Fees shall be approved only by an amendment to this Agreement in accordance with **Section 4.3**.

6.2.3.1 For Additional Services not included in the original **Agreement Form** that are provided by the A/E and any Consultants in accordance with **Section 4.3,** the Owner shall pay the A/E Additional Services Fees in an amount negotiated to the mutual reasonable satisfaction of the Contracting Authority, Owner and A/E, but in all events, such Additional Services Fees shall not exceed 2.5 times the Direct Personnel Expense incurred by the A/E and any applicable Consultant in providing those Additional Services.

6.3 Reimbursable Expenses

6.3.1 The A/E shall use its best efforts to minimize Reimbursable Expenses.

6.3.2 In all events, total Reimbursable Expenses shall not exceed the amount identified in the **Agreement Form**, without the prior written approval of the Contracting Authority and Owner and an amendment to this Agreement in accordance with **Section 4.3**.

6.3.3 Reimbursable Expenses shall only be permitted for the items identified in the **Agreement Form** and shall not exceed the respective amounts.

6.3.4 No A/E or Consultant mark-up shall be permitted on Reimbursable Expenses.

GMP Amendment revisions

1.2 Recap of Contract Sum and Related Items:

Compensation Component Description (refer to complete description in the Section of this GMP Amendment referenced below)	**Current Amount** (before execution of this GMP Amendment)	**Increase(Decrease)** (amount added to or (deducted from) Current Amount)	**Amended Amount** (after execution of this GMP Amendment)
1.1 Contract Sum	$«insert amount»	$«insert amount»	$«insert amount»
1.1.1 Estimated Cost of the Work	$«insert amount»	$«insert amount»	$«insert amount»
1.1.1.1 Personnel Costs	$«insert amount»	$«insert amount»	$«insert amount»
1.1.1.2 General Conditions Costs	$«insert amount»	$«insert amount»	$«insert amount»
1.1.1.3 Subcontracted Work	$«insert amount»	$«insert amount»	$«insert amount»
1.1.1.4 Self-performed Work	$«insert amount»	$«insert amount»	$«insert amount»
1.1.2 CM's Contingency	$«insert amount»	$«insert amount»	$«insert amount»
1.1.3 CM's Fee	$«insert amount»	$«insert amount»	$«insert amount»

If this is the first GMP Amendment for the Project, the values in the Current Amount column must be $0.00. If this is NOT the first GMP Amendment for the Project, the values in the Current Amount column must be the same as the values in the Amended Amount column on the last previously executed GMP Amendment. In either case, the values in the Increase(Decrease) column must match the values in Section 1.1 and subsequent sections, and the values in the Amended Amount must be the Current Amount plus the Increase(Decrease). The Preconstruction Services Amendment Form must be used to modify Preconstruction Services Compensation.

1.3 The CM's total compensation shall include the CM's Preconstruction Stage Compensation plus the amended amount of the Contract Sum identified in the table above.

1.4 The penal sum of the CM's Bonds shall equal 100 percent of the CM's total compensation.

GMP Amendment revisions

ARTICLE 2 - CONTRACT TIMES

2.1 The Contract Times are the periods established in the following table for the achievement of the associated Milestones:

Construction Stage Milestone(s) to which Liquidated Damages apply	**Contract Time**	**Projected Date** (as of the date of this GMP Amendment)
«insert description of interim milestone – add more rows if necessary – delete if none»	«insert number of calendar days» days	«insert date»
Substantial Completion of all Work	«insert number of calendar days» days	«insert date»

2.1.1 The projected dates listed under "Projected Date (as of the date of this GMP Amendment)" are provided only for convenient reference during the consideration and negotiation of this GMP Amendment. The durations listed under "Contract Time" define the Contract Times and take precedence over the projected dates.

Each duration in the Contract Time column above must be calculated from the anticipated date of the Notice to Proceed for the Work covered by this GMP Amendment to the date that the milestone must be achieved. DO NOT insert durations calculated between interim milestones as this DOES NOT comply with the General Conditions.

Domestic Steel

A/E Standard Terms and Conditions

1.4 Use of Domestic Steel

1.4.1 The A/E shall comply with ORC Section 153.011 regarding the specification and use of domestically produced steel products. Copies of ORC Section 153.011 may be obtained from the Ohio Facilities Construction Commission.

CM at Risk General Conditions

1.5 Use of Domestic Steel

1.5.1 The CM is required by law to supply domestically produced steel products used for load bearing structural purposes on all projects funded in whole or in part with State funds.

1.5.2 The CM and Subcontractors shall comply with ORC Section 153.011 regarding the use of domestically produced steel products, and furnish the certifications required by **Section 6.20.8**. Copies of ORC Section 153.011 may be obtained from the Ohio Facilities Construction Commission.

Domestic Steel

CM at Risk General Conditions

6.20.8 Domestic Steel Certifications. The CM shall include the following written certifications on the front cover or initial sheet of each structural steel fabrication Shop Drawing, signed and dated prior to fabrication:

6.20.8.1 "Steel Fabricator Certification: The steel fabricator identified below certifies that for this project all load-bearing structural steel has been fabricated or produced, to the best of its knowledge, only from steel made in the United States in accordance with Ohio Revised Code Section 153.011. Further, the steel fabricator hereby certifies that it has read and understands that a monetary penalty for violations may be imposed under the authority of Ohio Revised Code Section 153.99." This certification shall be followed by the name of the fabrication company, name of the company official signing the certification, the signature of that company official, and the date of that signature.

.1 The CM will be deemed to have included the above certification as required even if the associated Shop Drawing does not actually contain the certification.

6.20.8.2 "Contractor Certification: The contractor identified below certifies that it has required as a condition of purchase, that for this project all load-bearing structural steel shall be fabricated and produced using, to the best of its knowledge, only steel made in the United States in accordance with Ohio Revised Code Section 153.011. Further, the contractor hereby certifies that it has read and understands that a monetary penalty for violations may be imposed under the authority of Ohio Revised Code Section 153.99." This certification shall be followed by the name of the CM company, name of the company official signing the certification, the signature of that company official, and the date of that signature.

.1 The CM will be deemed to have included the above certification as required even if the associated Shop Drawing does not actually contain the certification.

Commercially useful function

A/E Standard Terms and Conditions

1.7 EDGE Business Development Program Participation

1.7.1 The A/E shall participate in the "Encouraging Diversity, Growth and Equity" Program ("EDGE") by contracting with and using one or more businesses certified as an EDGE Business Enterprise ("EDGE-certified Business") by the EOC.

1.7.1.1 If the A/E is an EDGE-certified Business, the A/E may include this Agreement amount in the reporting.

1.7.1.2 The amount of EDGE participation cannot exceed 100 percent of the amount of this Agreement.

1.7.1.3 The A/E shall include in the reporting only those expenditures to EDGE-certified Businesses that perform a commercially useful function as described in OAC Section 123:2-16-15.

CM at Risk General Conditions

1.8 EDGE Participation and Reporting

1.8.1 The CM shall participate in the "Encouraging Diversity, Growth and Equity" ("EDGE") Program by subcontracting with, and using one or more, businesses certified as an EDGE Business Enterprise ("EDGE-certified Business") by the EOC.

1.8.1.1 If the CM is an EDGE-certified Business, the CM may include its own compensation under this Contract in the reporting.

1.8.1.2 The amount of EDGE participation cannot exceed 100 percent of the sum of the CM's Preconstruction Stage Compensation plus the Contract Sum.

1.8.1.3 The CM shall include in the reporting only those expenditures to EDGE-certified Businesses that perform a commercially useful function as described in OAC Section 123:2-16-15.

Commercially useful function

OAC 123:2-16-15(B) EOD will consider the following when determining if an EDGE business enterprise is performing a commercially useful function:

(1) The workers on the EDGE contract or project are regular employees of the contracted EDGE business enterprise.

(a) Regular employees are employees that would be working for the EDGE business enterprise on any other subcontract with any other contractor.

(2) The equipment used by the EDGE business enterprise is owned, leased, or controlled by the EDGE business enterprise.

(3) The EDGE business enterprise has the responsibility, with respect to execution of the work of the contract, for actively managing, performing, and supervising the work involved.

(4) The EDGE business enterprise has the responsibility, with respect to materials and supplies used on the contract, for negotiating price, determining quality and quantity, ordering, payment, and, where applicable, installation.

Communication with A/E's Consultants

A/E Standard Terms and Conditions

ARTICLE 3 - CONSULTANTS

3.1 Consultant Services

3.1.1 The A/E may provide a portion of the Services through one or more Consultants, provided, however, that the A/E shall remain responsible for all of the A/E's duties and obligations under this Agreement.

3.1.2 By appropriate written agreement, the A/E shall require each Consultant, to the extent of the Consultant's portion of the Services, to be bound to the A/E by the terms of this Agreement, and to assume toward the A/E all of the obligations and responsibilities that the A/E assumes toward the Contracting Authority and Owner.

3.1.2.1 The A/E shall not retain any Consultant on terms inconsistent with this Agreement.

3.1.2.2 All agreements between the A/E and a Consultant shall identify the Contracting Authority and Owner as the agreement's intended third-party beneficiaries.

3.1.2.3 Upon the request of the Contracting Authority or Owner, the A/E shall submit to the Contracting Authority and Owner a copy of the agreement between the A/E and each Consultant.

3.1.5 The Contracting Authority may communicate with any Consultant either through the A/E or directly with the Consultant, but the Contracting Authority may not modify the agreement between the A/E and any Consultant. The Contracting Authority will advise the A/E with reasonable promptness of direct communication with any Consultant.

Allowances and Unit Prices

Instructions to Bidders

2.7 Allowances

2.7.1 If Allowances are provided on the **Bid Form**, the amount of each Allowance shall be included in the Base Bid amount. Allowances shall be used solely for the purpose of determining the adjustment to the Contract Sum for the difference between the amount of the Allowance and the actual cost of the related Work provided. Allowances shall not include the Contractor's Fee.

2.8 Unit Prices

2.8.1 If Unit Prices are requested on the **Bid Form**, the amount of the scheduled quantities shall be included in the Base Bid amount. Unit prices shall be used solely for the purpose of determining the adjustment to the Contract Sum for the difference between the estimated quantities on the **Bid Form** and the actual quantities provided.

2.8.2 Unit Prices shall include all materials, equipment, labor, delivery, installation, ~~overhead, profit,~~ and any other cost or expense, in connection with, or incidental to, the performance of that portion of the Work. Unit Prices shall not include the Contractor's Fee on account of the associated Unit Price Work. The Bidder shall submit Unit Prices for all items listed.

Allowances and Unit Prices

General Conditions

9.1 Allowances

9.1.1 The Contract Sum includes the Allowances (if any) identified in the Contract.

9.1.2 All Allowances include the cost to the Contractor (less any applicable trade discounts) of materials and equipment required by the Allowances to be delivered at the Site, and all applicable taxes.

9.1.3 The Contractor's Fee and costs for unloading and handling on the Site, labor, installation costs, and other expenses contemplated for the Allowances are not in the stated Allowance amounts but are otherwise included in the Contract Sum.

9.1.4 Before final payment, an appropriate Change Order will be issued to reconcile the Contract Sum so that it reflects actual amounts due to the Contractor on account of Work covered by Allowances.

9.2 Unit Prices

9.2.1 Where the Contract provides that all or part of the Work is to be Unit Price Work, initially the Contract Sum will include for all Unit Price Work **(1)** an amount equal to the sum of the established Unit Prices for each separately identified item of Unit Price Work times the estimated quantity of each item as indicated in the Contract plus **(2)** the Contractor's Fee on that Unit Price Work.

9.2.2 The estimated quantities of items of Unit Price Work are not guaranteed and are solely for the purpose of comparison of Bids and determining an initial Contract Sum. The Contracting Authority will determine the actual quantities and classifications of Unit Price Work performed by Contractor.

9.2.3 The Contractor's Fee on account of Unit Price Work is not in the stated Unit Price amounts but are otherwise included in the Contract Sum.

9.2.4 Before final payment, an appropriate Change Order will be issued as described under **Section 7.1.5** to reconcile the Contract Sum so that it reflects actual amounts due to the Contractor on account of Unit Price Work actually performed.

Sustainability Requirements (AHE)

A/E Scope of Services

1.2 Sustainability Requirements

1.2.1 This Project shall be designed and constructed in accordance with the requirements of Am. Sub. H.B. 251 of the 126th General Assembly and resulting rules, policy, and procedures adopted by the Commission establishing Sustainability Requirements for Capital Improvements Projects, including applicable provisions of OAC 3318-3:

1.2.1.1 The A/E shall incorporate cost-effective, energy-efficient, green building practices to the maximum extent possible into the Project.

1.2.1.2 If the Owner is an agency of the state of Ohio, the A/E shall design new construction so that fossil-fuel, greenhouse gas emitting, energy consumption of the facility is reduced by 65 percent, as compared to the regional average for that building type as evidenced by the U.S. Environmental Protection Agency's Target Finder calculator.

1.2.1.3 If the Owner is an agency of the state of Ohio, the A/E shall design renovations so that fossil-fuel, greenhouse gas emitting, energy consumption of the facility is reduced by 50 percent, as compared to the regional average for that building type as evidenced by the U.S. Environmental Protection Agency's Target Finder calculator.

1.2.1.4 The Owner may apply to the Commission for a waiver of compliance with the requirements of **Section 1.2.1.2** and/or **Section 1.2.1.3**.

Sustainability Requirements (K-12)

A/E Scope of Services

1.2 Sustainability Requirements

1.2.1 This Project shall be designed and constructed in accordance with the requirements of Am. Sub. H.B. 251 of the 126th General Assembly and resulting rules, policy, and procedures adopted by the Ohio Facilities Construction Commission establishing Sustainability Requirements for Capital Improvements Projects, including applicable provisions of OAC 3318-3.

1.2.2 LEED Certification. The A/E shall design, document, and administer construction of the Project to achieve certification at the Silver level in the U.S. Green Building Council's LEED for Schools program with an emphasis on Energy and Atmosphere credits. LEED submission requirements and the elements necessary to attain the required certification are incorporated into **Exhibit C**. The A/E shall specify, collect and review the required submittals, certifications, reports, and other documentation and submit them to GBCI for the purpose of achieving the certification.

1.2.3 The A/E shall utilize the United States Environmental Protection Agency's Target Finder to establish the energy consumption target for the Project.

1.2.4 The A/E shall analyze energy consumption of the Project using parametric modeling tools.

1.2.5 If the Project scope includes LEED enhanced commissioning, the A/E shall participate in the Commissioning Process, coordinate its Services and cooperate with a third-party Commissioning Agent ("CxA") engaged by the Contracting Authority.

Questions?

Lane Beougher

lane.beougher@ofcc.ohio.gov

Lessons Learned: Completing the 330 Form

Craig Weise

Chief of Projects

Jeff Kring

Agency | Higher Education Program Manager

@OHFacilities / #OFCConf16

OFCC Conference

Topics:

- Request for Qualifications (RFQ)
- RFQ Rating Rubric
- **Statement of Qualifications F110-330**
- **Selection Rating Form**

Request for Qualifications (RFQ)

- RFQ posted on OFCC website
- May sign-up for automatic notifications

Request for Qualifications (Architect / Engineer)
State of Ohio Standard Forms and Documents

Administration of Project: Select Organization

Project Name	Project Name	Response Deadline	Date	Time	local time
Project Location	Project Location	Project Number	Project Number		
City / County	City / County	Project Manager	Project Manager		
Owner	Owner	Contracting Authority	Select Organization		
Delivery Method	Select Delivery Method	Prevailing Wages	Select Type		
No. of paper copies requested (stapled, not bound)	Number	No. of electronic copies requested (PDF)			Number

Submit the requested number of Statements of Qualifications (Form F110-330) directly to Contact Name at E-mail or Mailing Address. See Section H of this RFQ for additional submittal instructions.

Submit all questions regarding this RFQ in writing to Contact Name at E-mail Address with the project number included in the subject line (no phone calls please). Questions will be answered and posted to the 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

REVISE AS INDICATED – DELETE THIS INSTRUCTION
This text is an example and is instructional. Insert a very brief description of the project. Include the purpose or function of the completed project. Include type or types of facilities, general business functions or each, basic functional needs, etc. Briefly describe site(s), including location, special features, and restrictions, etc. Attach appropriately developed Program of Requirements ("POR") or indicate that the Architect/Engineer ("A/E") will prepare the POR as an Additional Service.

Add additional project description here…

B. Scope of Services

REVISE AS APPROPRIATE – DELETE THIS INSTRUCTION
Introductory paragraph.

For projects advertised with an appropriately developed Program of Requirements (POR), upon award of the Agreement, commence with Design. For projects without such a POR, upon award of the Agreement, commence by developing the Program of Requirements.

The selected A/E, as a portion of its required Scope of Services and prior to submitting its proposals, will discuss and clarify with the Owner and/or the Contracting Authority, the cost breakdown of the Architect/Engineer Agreement detailed cost components to address the Owner's project requirements. Participate in the Encouraging Growth, Diversity & Equity (EDGE) Program as required by statute and the Agreement.

As required by the Agreement, and as properly authorized, provide the following categories of services: Program Verification, Schematic Design, Design Development, Construction Document Preparation, Bid and Award Support, Conformed Documents, Construction Administration, Post-Construction, and Additional Services of all types.

Refer to the *Select type of 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.

During the construction period, provide not less than Number hours (excluding travel time) on-site construction administration services each week, including (1) attendance at progress meetings, (2) a written field report of each site visit, (3) on-site representation comprised of the A/E and its consultant staff involved in the primary design of the project, all having relevant and appropriate types of construction administration experience.

REVISE AS NECESSARY – DELETE THIS INSTRUCTION
Please list all major scope services needed to complete the selection process for successful project delivery. The specific scope of services must state particular building types, functional design or specialized professional services required to evaluate the level of experience of each applicant firm (e.g. parking garage, kitchen design, correctional facility, medical facility). The scope of services should also define the types of basic and additional professional design and administration

F110-02-2016-JAN Publish Date: [leave blank]; Ohio Register # [leave blank] Page 1 of 4

RFQ Rating Rubric

- Rubric to help evaluators
- Available on OFCC website

Professional Services Selection Rating Rubric
State of Ohio Standard Forms and Documents

Selection Criteria

General

- Qualifications should be scored on the information contained in the submitted F110-330. Exceptions: Criteria 1b – amount of contracts awarded can be verified, Criteria 5a - past performance information can be supplemented with public records and evaluations contained in OAKS CI from other Contracting Authorities and references can be checked.
- If a reviewer has a question during the review and scoring process, all other reviewers should receive the same information and feedback through the selection coordinator. No reviewer should ask questions or make direct contact with any eligible firm regarding selection during process.
- Consider all factors in totality and consistently apply scoring rationale across all RFQs.

1. Primary Firm Location, Workload and Size (Maximum 10 points)

#	Criteria	Example				F110-330 Key
a.	**Proximity of Firm to Project Site**	**Range**	**Value**	**Actual**	**Score**	
	Roadway miles measured from Lead Firm's office to project site.	0 - 50 miles	5	20	5	**Part 1 Section C, 14a** (lead firm only)
		50 - 100 miles	2	70	2	
		Over 100 miles	0	200	0	
b.	**Amount of Fees / Contracts Awarded by Contracting Authority**	**Example #1 (A/E, C-A/E, CMA)** (Max = 2 points)				**F110-330 Key**
		Range	**Value**	**Actual**	**Score**	
	Total revenues in past 2 years awarded by Contracting Authority.	< $100K	2	$20K	2	**Part 2 Section 11a** (lead firm only)
		$100K - $500K	1	$170K	1	
		> $500K	0	$750K	0	
	Workload ($) for A/E, C-A/E, CMA is based on value of fees, while workload for CMR & DB is based on total contracts awarded by the Contracting Authority.	**Example #2 (CMR & DB)** (Max = 5 points)				
		Range	**Value**	**Actual**	**Score**	
		< $10M	5	$2M	5	
		$10M - $50M	2	$25M	2	
		> $50M	0	$60M	0	
c.	**Number of Licensed / Relevant Professionals** (Does not apply to CMR & DB)	**Example (A/E, C-A/E)** (Max = 3 points)				**F110-330 Key**
		Range	**Value**	**Actual**	**Score**	
	Number of licensed professionals in Lead Firm providing *primary* services required for project.	Small = < 3	Max = 3	2	1	**Part 2 Section 9c, Column 1** (lead firm only)
		Med = 3 - 7		7	2	
		Large = > 7		12	3	

2. Primary Firm Qualifications (Maximum 30-40 points, varies by type of service)

#	Criteria	
a.	**Project Management Lead**	**F110-330 Key**
	Consider education level or professional licenses attained, number of years experience in industry, number of years as project management lead, number of similar projects completed, past performance of specific person in managing scope/schedule/budget/quality.	**Part 1, Section B** (Main point of contact(s) identified) **Part 1, Section D** (Project Mgt. Lead identified in table) **Part 1, Section E, Items 17** (Project Mgt. Lead resume identified) **Part 1, Section E, Item 18-23** (Project Mgt. Lead's education/training, licenses, years experience, etc.) **Part 1, Section F, Item 28** (possible performance statistics) **Part 1, Section G, Item 30** (participation in example projects) **Part 1, Section H** (possible additional info)
b.	**Option 1: Project Design Lead** (Does not apply to CMA & CMR)	**F110-330 Key**
	Consider education level or professional licenses attained, number of years experience in industry, number of years experience as project design lead, number of similar projects completed, past performance of specific person in providing clients creative, effective and efficient design solutions to meet their needs.	**Part 1, Section D** (Design Lead identified in table) **Part 1, Section E, Items 17** (Design Lead resume identified) **Part 1, Section E, Item 18-23** (Design Lead's education/training, licenses, years experience, etc.) **Part 1, Section F, Item 28** (possible performance statistics) **Part 1, Section G, Item 30** (participation in example projects) **Part 1, Section H** (possible additional info)

SOQ Instructions

- First 10 pages of SOQ
- Please read and follow!
  - Most ignored section

Statement of Qualifications
State of Ohio Standard Forms and Documents

State of Ohio agencies and state-supported institutions of higher education use this form to obtain information from Architect/Engineer ("A/E"), Construction Management ("CM"), and Design-Build ("DB") firms about their professional qualifications. State agencies select firms for A/E contracts on the basis of professional qualifications as required by Sections 153.65 through 153.71 of the Ohio Revised Code. This form may also be used to obtain the qualifications of CM, selected as required by Sections 9.33 through 9.333 of the Ohio Revised Code, or other professional services related to the design or construction of public improvements. This form may also be used in the Qualifications Phase of the Best Value Selection process for CM at Risk contracts as required by Section 9.334 of the Ohio Revised Code and Section 153:1-6-01 of the Ohio Administrative Code, and for Design-Build contracts as required by Section 153.693 of the Ohio Revised Code and Section 153:1-6-02 of the Ohio Administrative Code.

The Ohio Revised Code requires the public announcement of requirements for A/E and CM services (with some exceptions provided by other statutes), and the selection of at least three of the most highly qualified firms based on demonstrated competence and professional qualifications according to specific criteria published in the announcement. The Ohio Revised Code then requires the negotiation of a contract at a fair and reasonable price starting first with the most highly qualified firm. **(Ohio Revised Code Sections 9.332 and 153.65 through 153.691.)**

The information used to evaluate firms is from this form and other sources, including performance evaluations, any additional data requested by the Contracting Authority, and interviews with the most highly qualified firms and their references.

GENERAL INSTRUCTIONS

Do not include this instruction pages with your submission. Only include Part I and Part II of the form.

Part I presents the qualifications for a specific contract.

Part II presents the general qualifications of a firm or a specific branch office of a firm. Part II has two uses:

1. Submit Part II with each Statement of Qualifications. Prepare a separate Part II for each firm that will be part of the team proposed for a specific contract and submitted with Part I. If a firm has branch offices, submit a separate Part II for each branch office that has a key role on the team.

2. A public announcement is not required for certain contracts (e.g. the Ohio Facilities Construction Commission consultant list), and agencies may use Part II as a basis for selecting at least three of the most highly qualified firms for discussions prior to requesting submission of Part I. If a firm has branch offices, submit a separate Part II for each branch office seeking work.

INDIVIDUAL CONTRACTING AUTHORITY INSTRUCTIONS

Individual agencies may supplement these instructions in the Request for Qualifications. For example, they may limit the number of projects or number of pages submitted in Part I in response to a public announcement for a particular project. Carefully comply with any Contracting Authority instructions when preparing and submitting this form. Be as concise as possible and provide only the information requested by the Contracting Authority.

DEFINITIONS

Architect-Engineer Services: Has the same meaning as Ohio Revised Code 153.65(C) definition for professional design services; "services within the scope of practice of an architect or landscape architect registered under Chapter 4703 of the Revised Code or a professional engineer or surveyor registered under Chapter 4733 of the Revised Code." This term may also include the services of a Criteria A/E for a Design-Build project.

Construction Manager: Has the same meaning as Ohio Revised Code 9.33 definition of Construction Manager; "a person with substantial discretion and authority to plan, coordinate, manage, and direct all phases of a project for the construction, demolition, alteration, repair, or reconstruction of any public building, structure, or other improvement, but does not mean the person who provides the professional design services or who actually performs the construction, demolition, alteration, repair, or reconstruction work on the project."

Construction Manager at Risk: Has the same meaning as Ohio Revised Code 9.33 definition of Construction Manager at Risk; "a person with substantial discretion and authority to plan, coordinate, manage, and direct all phases of a project for the construction, demolition, alteration, repair, or reconstruction of any public building, structure, or other improvement, but does not mean the person who provides the professional design services or who actually performs the construction, demolition, alteration, repair, or reconstruction work on the project."

Design-Builder: Has the same meaning as Ohio Revised Code 153.65 definition of Design-Build firm; "a person capable of providing Design-Build services, which is defined as services that form an integrated delivery system for which a person is responsible to a public authority for both the design and construction, demolition, alteration, repair, or reconstruction of a public improvement."

Branch Office: A geographically distinct place of business or subsidiary office of a firm that has a key role on the team.

F110-330v0814 Page 1 of 23

Statement of Qualifications (SOQ)

- F110-330 Form used for all selections
  - A/E
  - C-A/E
  - CMA
  - CMR
  - DB
  - Specialty Consultants

STATEMENT OF QUALIFICATIONS

PART I – CONTRACT SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

1. PROJECT TITLE AND LOCATION (City and County)

2. ANNOUNCEMENT DATE | 3. PROJECT NUMBER

B. FIRM POINT OF CONTACT

4. PROJECT REPRESENTATIVE NAME AND TITLE | 5. PRESIDENT / CEO

6. NAME OF FIRM (LEGAL NAME ON FILE WITH THE OHIO SECRETARY OF STATE)

7. TELEPHONE NUMBER | 8. FAX NUMBER | 9. E-MAIL ADDRESS

10. COUNTY | 11. FTID NUMBER | 12. WEB ADDRESS

C. PROPOSED TEAM

(Complete this section for the lead firm or joint venture partners, and all key consultants.)

	(Check) Lead Firm	JV Partner	Consultant	13. FIRM NAME	14. ADDRESS	15. ROLE IN THIS CONTRACT
a.	☐	☐	☐	☐ Check if EDGE certified	☐ Check if branch office ___ Miles from project site	
b.	☐	☐	☐	☐ Check if EDGE certified	☐ Check if branch office	
c.	☐	☐	☐	☐ Check if EDGE certified	☐ Check if branch office	
d.	☐	☐	☐	☐ Check if EDGE certified	☐ Check if branch office	
e.	☐	☐	☐	☐ Check if EDGE certified	☐ Check if branch office	
f.	☐	☐	☐	☐ Check if EDGE certified	☐ Check if branch office	

F110-330v0814 [Insert Project Title / Firm Name] Page 12 of 23

Selection Rating Form

- Last page of RFQ
- Completing this form is evaluators goal
  - Please make it easy!

Architect / Engineer Selection Rating Form
State of Ohio Standard Forms and Documents

Project Name: Project Name
Project Number: Project Number
Proposer Firm: _____
City, State, Zip: _____

Selection Criteria		Value		Score
1. Primary Firm Location, Workload and Size (Maximum 10 points)				
a. Proximity of firm to project site	Less than aa miles	5		
	aa miles to bb miles	2		
	More than bb miles	0		
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than $cc	2		
	$cc to $dd	1		
	More than $dd	0		
c. Number of licensed professionals	Less than ee professionals	gg	Max = 3	
	ee to ff professionals	hh		
	More than ff professionals	ii		
2. Primary Firm Qualifications (Maximum 30 points)				
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10		
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - jj	Max = 20	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - kk		
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - ll		
3. Key Consultant Qualifications (Maximum 20 points)				
a. Key discipline leads	Experience / ability of key consultants to perform effectively and collaboratively	0 - 15		
b. Proposed EDGE-certified Consultant participation*	One point for every 2 percent increase in professional services over the EDGE participation goal	0 - 5		
4. Overall Team Qualifications (Maximum 10 points)				
a. Previous team collaboration	Less than mm sample projects	1	Max = 3	
	mm to nn sample projects	2		
	More than nn 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 oo projects	0 - 3		
	oo to pp projects	4 - 6		
	More than pp 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 qq projects	0 - 1		
	qq to rr projects	2 - 3		
	More than rr projects	4 - 5		
* Must be comprised of professional design services consulting firm(s) and NOT the lead firm ** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute		Subtotal		

1a. Proximity of Firm to Project Site

Architect / Engineer Selection Rating Form
State of Ohio Standard Forms and Documents

Project Name: Project Name
Project Number: Project Number
Proposer Firm: _____
City, State, Zip: _____

Selection Criteria		Value	Score
1. Primary Firm Location, Workload and Size (Maximum 10 points)			
a. Proximity of firm to project site	Less than 100 miles	5	
	100 miles to 200 miles	2	
	More than 200 miles	0	

2. Primary Firm Qualifications (Maximum 30 points)				
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10	Max = 20	
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - jj		
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - kk		
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - ll		
3. Key Consultant Qualifications (Maximum 20 points)				
a. Key discipline leads	Experience / ability of key consultants to perform effectively and collaboratively	0 - 15		
b. Proposed EDGE-certified Consultant participation*	One point for every 2 percent increase in professional services over the EDGE participation goal	0 - 5		
4. Overall Team Qualifications (Maximum 10 points)				
a. Previous team collaboration	Less than mm sample projects	1	Max = 3	
	mm to nn sample projects	2		
	More than nn 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 oo projects	0 - 3		
	oo to pp projects	4 - 6		
	More than pp 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 qq projects	0 - 1		
	qq to rr projects	2 - 3		
	More than rr projects	4 - 5		
* Must be comprised of professional design services consulting firm(s) and NOT the lead firm ** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute		Subtotal		

1a. Proximity of Firm to Project Site

- Lead Firm's Address (Section C, 14a)
- Roadway miles measured from Lead Firm's office to Project location
- Office where work will be performed, not closest office
- Verified with Google Maps, Map Quest, etc.
  - We may arrive at a different distance
  - If multiple sites, use the furthest location

1b. Amount of Fees Awarded

Architect / Engineer Selection Rating Form
State of Ohio Standard Forms and Documents

Project Name: Project Name
Project Number: Project Number
Proposer Firm: _____
City, State, Zip: _____

Selection Criteria		Value	Score
1. Primary Firm Location, Workload and Size (Maximum 10 points)			
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than $200,000	2	
	$200,000 to $500,000	1	
	More than $500,000	0	

2. Primary Firm Qualifications (Maximum 30 points)				
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10	Max = 20	
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - jj		
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - kk		
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - ll		
3. Key Consultant Qualifications (Maximum 20 points)				
a. Key discipline leads	Experience / ability of key consultants to perform effectively and collaboratively	0 - 15		
b. Proposed EDGE-certified Consultant participation*	One point for every 2 percent increase in professional services over the EDGE participation goal	0 - 5		
4. Overall Team Qualifications (Maximum 10 points)				
a. Previous team collaboration	Less than mm sample projects	1	Max = 3	
	mm to nn sample projects	2		
	More than nn 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 oo projects	0 - 3		
	oo to pp projects	4 - 6		
	More than pp 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 qq projects	0 - 1		
	qq to rr projects	2 - 3		
	More than rr projects	4 - 5		
		Subtotal		

* Must be comprised of professional design services consulting firm(s) and NOT the lead firm
** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute

1b. Amount of Fees Awarded

- Total revenues in past 2 years
- Revenues awarded by Contracting Authority
- Workload for A/E, C-A/E, and CMA based on value of fees
- Workload for CMR and DB based on total contracts

1b. Amount of Fees Awarded

- Fee Ranges (SOQ Form, Part II)

11. TOTAL REVENUES FOR LAST 2 YEARS *(Insert revenue index number shown at right)* **For OFCC administration, include contracts administered by OFCC, SAO, and OSFC*		REVENUE INDEX NUMBER	
a. Work for this Contracting Authority*		1. Less than $50,000 2. $50,000 to less than $100,000 3. $100,000 to less than $200,000 4. $200,000 to less than $500,000 5. $500,000 to less than $1,000,000	6. $1,000,000 to less than $2,000,000 7. $2,000,000 to less than $5,000,000 8. $5,000,000 to less than $10,000,000 9. $10,000,000 to less than $20,000,000 10. $20,000,000 to less than $50,000,000
b. Other State Work *(see instructions)*			
c. **Total State Work**			

- Revenues may be verified (database)
  - We may arrive at a different total

1c. Number of Licensed Professionals

Architect / Engineer Selection Rating Form
State of Ohio Standard Forms and Documents

Project Name: Project Name
Project Number: Project Number
Proposer Firm: _____
City, State, Zip: _____

Selection Criteria		Value		Score
1. Primary Firm Location, Workload and Size (Maximum 10 points)				
	More than $500,000	0		
c. Number of licensed professionals	Less than 5 professionals	1	Max = 3	
	5 to 20 professionals	3		
	More than 20 professionals	2		

2. Primary Firm Qualifications (Maximum 30 points)				
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10		
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - jj	Max = 20	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - kk		
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - ll		
3. Key Consultant Qualifications (Maximum 20 points)				
a. Key discipline leads	Experience / ability of key consultants to perform effectively and collaboratively	0 - 15		
b. Proposed EDGE-certified Consultant participation*	One point for every 2 percent increase in professional services over the EDGE participation goal	0 - 5		
4. Overall Team Qualifications (Maximum 10 points)				
a. Previous team collaboration	Less than mm sample projects	1	Max = 3	
	mm to nn sample projects	2		
	More than nn 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 oo projects	0 - 3		
	oo to pp projects	4 - 6		
	More than pp 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 qq projects	0 - 1		
	qq to rr projects	2 - 3		
	More than rr projects	4 - 5		
* Must be comprised of professional design services consulting firm(s) and NOT the lead firm ** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute		Subtotal		

1c. Number of Licensed Professionals

- Licensed professionals from Lead Firm providing ***primary*** services(SOQ Form Part II)

9. EMPLOYEES BY DISCIPLINE				10. PROFILE OF FIRM'S EXPERIENCE AND ANNUAL AVERAGE REVENUE FOR LAST 5 YEARS		
a. Function Code	b. Discipline	c. No. of Employees		a. Profile Code	b. Experience	c. Revenue Index Number (see below)
		(1) LICENSED	(2) NON-LICENSED			
	Other Employees					
	Total					

1c. Number of Licensed Professionals

- RFQ Section D: Services Required, lists Primary and Secondary services requested

D. Services Required (see note below)

Primary	Architecture
Secondary	Mechanical Engineering
	Electrical Engineering
	Structural Engineering
Others	Other Discipline(s)

2a-d. Primary Firm Qualifications

Architect / Engineer Selection Rating Form
State of Ohio Standard Forms and Documents

Project Name: Project Name
Project Number: Project Number
Proposer Firm: _____
City, State, Zip: _____

Selection Criteria		Value	Score
1. Primary Firm Location, Workload and Size (Maximum 10 points)			
a. Proximity of firm to project site	Less than aa miles	5	
	aa miles to bb miles	2	
	More than bb miles	0	

2. Primary Firm Qualifications (Maximum 30 points)				
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10	Max = 20	
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - 5		
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - 5		
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - 10		

a. Previous team collaboration	Less than mm sample projects	1	Max = 3	
	mm to nn sample projects	2		
	More than nn 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 oo projects	0 - 3		
	oo to pp projects	4 - 6		
	More than pp 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 qq projects	0 - 1		
	qq to rr projects	2 - 3		
	More than rr projects	4 - 5		
		Subtotal		

* Must be comprised of professional design services consulting firm(s) and NOT the lead firm
** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute

2a-d. Primary Firm Qualifications

- 2a. Project Management Lead
- 2b. Project Design Lead/Project Admin. Lead
- 2c. Technical Staff
- 2d. Construction Administration Staff

2. **Primary Firm Qualifications** (Maximum 30 points)				
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10		
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - 5	Max = 20	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - 5		
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - 10		

- NOTE: use roles as listed in SOQ Instructions

2a-d. Primary Firm Qualifications

- Resume will be evaluated using criteria in Selection Rating Form

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person. Limit one page per person)

16. NAME	17. ROLE IN THIS CONTRACT	18. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
19. FIRM NAME AND LOCATION (City and State)	20. EDUCATION (Degree and Specialization)	21. CURRENT OH PROF REGISTRATIONS (List Discipline)	

22. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)

23. RELEVANT PROJECTS *(Up to a maximum of 5 samples)*

	(1) Title, Client & Location (City, State)	(2) Building Type, Size & Project Cost / Performance	(3) Type of Construction, Delivery Model & Services	(4) Date Completed		(5) Example Project Key No.
				Design	Construction	
a.						
	(6) Role (Benefit / Value to Client)			☐ Check if project performed with current firm		

2a-d. Primary Firm Qualifications

- Education level and professional licenses
- Experience in project role
- Similar projects completed
- Review SOQ Section H to find additional relevant information about key team members
- Review first page of Resume (1 pg. max)
  - Subsequent pages will not be evaluated

2a-d. Primary Firm Qualifications

- **Project Management Lead**
  - managing scope, schedule, and budget
- **Project Design Lead**
  - creative, effective, efficient design solutions
- **Technical Staff**
  - communication, timely admin. of processes
- **Construction Administration Staff**
  - identify issues, timely problem solving

2a-d. Primary Firm Qualifications

Common Challenges:

- Resume does not include information directly related to scoring criteria
- Section H does not include specific information addressing scoring criteria
- Example Project pages do not include information directly related to scoring criteria
  - How are evaluators going to score criteria?

3a. Key Consultant Qualifications

Architect / Engineer Selection Rating Form
State of Ohio Standard Forms and Documents

Project Name: Project Name
Project Number: Project Number
Proposer Firm: _____
City, State, Zip: _____

Selection Criteria		Value		Score
1. Primary Firm Location, Workload and Size (Maximum 10 points)				
a. Proximity of firm to project site	Less than aa miles	5		
	aa miles to bb miles	2		
	More than bb miles	0		
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than $cc	2		
	$cc to $dd	1		
	More than $dd	0		
c. Number of licensed professionals	Less than ee professionals	gg	Max = 3	
	ee to ff professionals	hh		
	More than ff professionals	ii		
2. Primary Firm Qualifications (Maximum 30 points)				
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10		
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - jj		
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - kk	Max = 20	
3. Key Consultant Qualifications (Maximum 20 points)				
a. Key discipline leads	Experience / ability of key consultants to perform effectively and collaboratively	0 - 15		
4. Overall Team Qualifications (Maximum 10 points)				
a. Previous team collaboration	Less than mm sample projects	1	Max = 3	
	mm to nn sample projects	2		
	More than nn 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 oo projects	0 - 3		
	oo to pp projects	4 - 6		
	More than pp 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 qq projects	0 - 1		
	qq to rr projects	2 - 3		
	More than rr projects	4 - 5		
		Subtotal		

* Must be comprised of professional design services consulting firm(s) and NOT the lead firm
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3a. Key Consultant Qualifications

- Summary of all key disciplines
- Includes qualifications of EDGE partners
- Review Resumes (Section E)
- Similar evaluation as Lead Firm's Qualifications

3a. Key Consultant Qualifications

- Education level and professional licenses
- Experience in project role
- Similar projects completed
- Review SOQ Section H to find additional relevant information about key team members
- Review first page of Resume (1 pg. max)
  - Subsequent pages will not be evaluated

3b. EDGE Consultant Participation

Architect / Engineer Selection Rating Form
State of Ohio Standard Forms and Documents

Project Name: Project Name
Project Number: Project Number
Proposer Firm: _____
City, State, Zip: _____

Selection Criteria		Value		Score
1. Primary Firm Location, Workload and Size (Maximum 10 points)				
a. Proximity of firm to project site	Less than aa miles	5		
	aa miles to bb miles	2		
	More than bb miles	0		
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than $cc	2		
	$cc to $dd	1		
	More than $dd	0		
c. Number of licensed professionals	Less than ee professionals	gg	Max = 3	
	ee to ff professionals	hh		
	More than ff professionals	ii		
2. Primary Firm Qualifications (Maximum 30 points)				
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10		
	Experience / creativity of project designer to			

3. Key Consultant Qualifications (Maximum 20 points)			
b. Proposed EDGE-certified Consultant participation*	One point for every 2 percent increase in professional services over the EDGE participation goal	0 - 5	

4. Overall Team Qualifications (Maximum 10 points)				
a. Previous team collaboration	Less than mm sample projects	1	Max = 3	
	mm to nn sample projects	2		
	More than nn 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 oo projects	0 - 3		
	oo to pp projects	4 - 6		
	More than pp 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 qq projects	0 - 1		
	qq to rr projects	2 - 3		
	More than rr projects	4 - 5		
		Subtotal		

* Must be comprised of professional design services consulting firm(s) and NOT the lead firm
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3b. EDGE Consultant Participation*

* Must be comprised of professional services consulting firm(s) and NOT lead firm
- Is there a fully executed Statement of Intent to Contract and Perform?
- Is the proposed EDGE commitment over the goal advertised in Section F of RFQ?

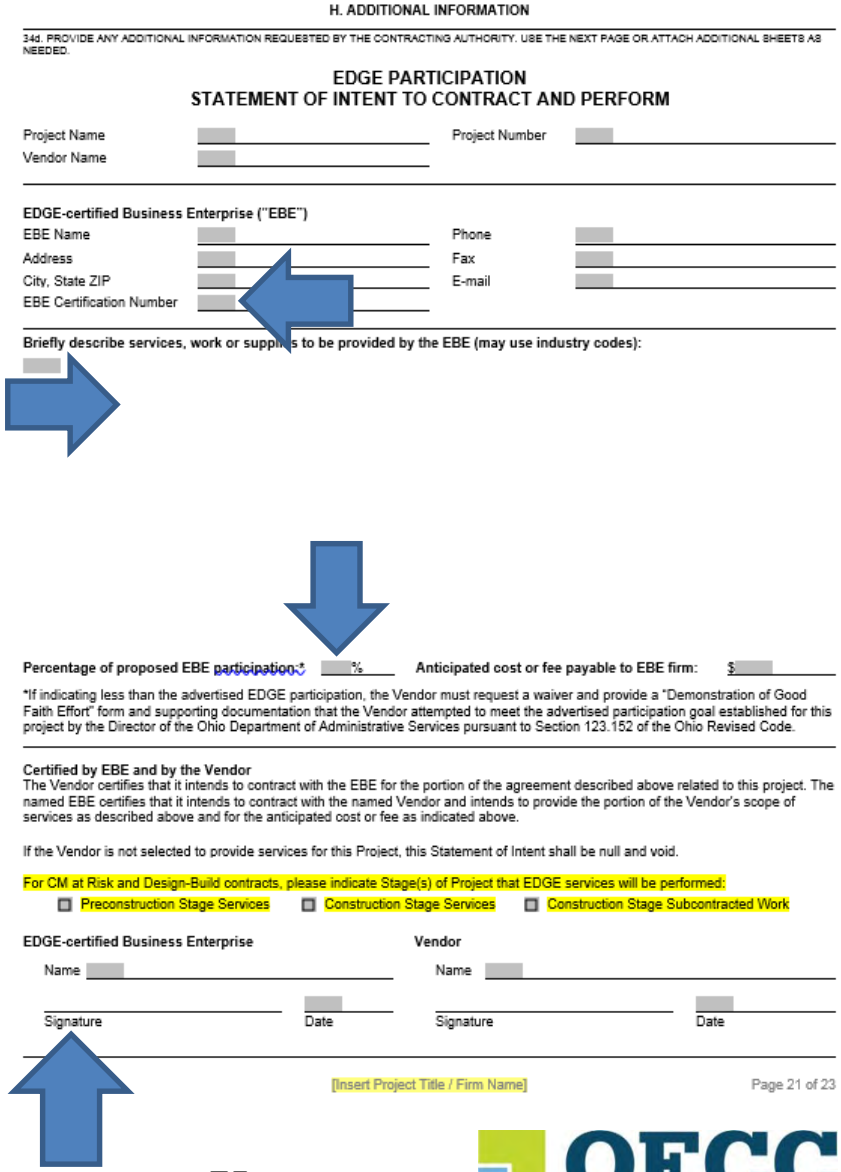
F. EDGE Participation Goal

Percent of *initial* TOTAL A/E Fee 5.0%

EDGE Commitment / Statement of Intent

Errors/Omissions

- EDGE Cert. #
- Scope of Services
- % Participation
- Signatures
  - Is certification still valid for vendor?



H. ADDITIONAL INFORMATION

34d. PROVIDE ANY ADDITIONAL INFORMATION REQUESTED BY THE CONTRACTING AUTHORITY. USE THE NEXT PAGE OR ATTACH ADDITIONAL SHEETS AS NEEDED.

EDGE PARTICIPATION
STATEMENT OF INTENT TO CONTRACT AND PERFORM

Project Name
Vendor Name
Project Number

EDGE-certified Business Enterprise ("EBE")
EBE Name
Address
City, State ZIP
EBE Certification Number
Phone
Fax
E-mail

Briefly describe services, work or supplies to be provided by the EBE (may use industry codes):

Percentage of proposed EBE participation:* %
Anticipated cost or fee payable to EBE firm: $

*If indicating less than the advertised EDGE participation, the Vendor must request a waiver and provide a "Demonstration of Good Faith Effort" form and supporting documentation that the Vendor attempted to meet the advertised participation goal established for this project by the Director of the Ohio Department of Administrative Services pursuant to Section 123.152 of the Ohio Revised Code.

Certified by EBE and by the Vendor
The Vendor certifies that it intends to contract with the EBE for the portion of the agreement described above related to this project. The named EBE certifies that it intends to contract with the named Vendor and intends to provide the portion of the Vendor's scope of services as described above and for the anticipated cost or fee as indicated above.

If the Vendor is not selected to provide services for this Project, this Statement of Intent shall be null and void.

For CM at Risk and Design-Build contracts, please indicate Stage(s) of Project that EDGE services will be performed:
Preconstruction Stage Services
Construction Stage Services
Construction Stage Subcontracted Work

EDGE-certified Business Enterprise
Name
Signature
Date

Vendor
Name
Signature
Date

[Insert Project Title / Firm Name]
Page 21 of 23

3b. EDGE Consultant Participation

- Calculate EDGE points. 1 point for every 2% increase over published goal
- EXAMPLE:

5% = 0 Pts.	9% = 2 Pts.	13% = 4 Pts.
6% = 0 Pts.	10% = 2 Pts.	14 % = 4 Pts.
7% = 1 Pt.	11% = 3 Pts.	15 % = 5 Pts.
8% = 1 Pt.	12% = 3 Pts.	

- < 5.0% does not meet goal

4a. Overall Team Qualifications

Architect / Engineer Selection Rating Form
State of Ohio Standard Forms and Documents

Project Name: Project Name
Project Number: Project Number
Proposer Firm: _____
City, State, Zip: _____

Selection Criteria		Value		Score
1. Primary Firm Location, Workload and Size (Maximum 10 points)				
a. Proximity of firm to project site	Less than aa miles	5		
	aa miles to bb miles	2		
	More than bb miles	0		
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than $cc	2		
	$cc to $dd	1		
	More than $dd	0		
c. Number of licensed professionals	Less than ee professionals	gg	Max = 3	
	ee to ff professionals	hh		
	More than ff professionals	ii		
2. Primary Firm Qualifications (Maximum 30 points)				
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10		
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - jj	Max = 20	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - kk		
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - ll		
3. Key Consultant Qualifications (Maximum 20 points)				
a. Key discipline leads	Experience / ability of key consultants to perform effectively and collaboratively	0 - 15		
b. Proposed EDGE-certified Consultant participation*	One point for every 2 percent increase in professional services over the EDGE	0 - 5		
4. Overall Team Qualifications (Maximum 10 points)				
a. Previous team collaboration	Less than 4 sample projects	1	Max = 3	
	4 to 6 sample projects	2		
	More than 6 sample projects	3		
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 oo projects	0 - 3		
	oo to pp projects	4 - 6		
	More than pp 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 qq projects	0 - 1		
	qq to rr projects	2 - 3		
	More than rr projects	4 - 5		
		Subtotal		

* Must be comprised of professional design services consulting firm(s) and NOT the lead firm
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4a. Previous team collaboration

- Review Section G. Matrix
- Typical key members include:
  - Project Management Lead
  - Project Design Lead/Project Admin. Lead
  - Technical Staff
  - Construction Administration Lead
  - Key Consultant Leads
- How many projects from Section F have listed team members worked together?

4a. Previous team collaboration

G. KEY PERSONNEL PARTICIPATION IN EXAMPLE PROJECTS

30. NAMES OF KEY PERSONNEL (From Section E, Block 16)	31. ROLE IN THIS CONTRACT (From Section E, Block 17)	32. EXAMPLE PROJECTS LISTED IN SECTION F (Fill in "Example Projects Key" section below before completing table. Place "X" under project key number for participation in same or similar role.)									
		1	2	3	4	5	6	7	8	9	10
Justin Charge	Project Management Lead	X	X	X	X	X	X	X	X		
Dee Sine	Project Design Lead	X	X								
Mark Upt	Technical Staff (Proj Arch)	X	X		X		X	X	X		
Robert Builder	Construction Admin. Lead	X	X				X	X	X		
H. Cooley	Proj. Mgmt. Lead (PME)	X		X			X			X	X

- Majority of **key** team members collaborating equals half of identified team
- EXAMPLE: half of team members have worked together on 5 of 10 projects

4b. LEED Project Experience

Architect / Engineer Selection Rating Form
State of Ohio Standard Forms and Documents

Project Name: Project Name
Project Number: Project Number
Proposer Firm: _____
City, State, Zip: _____

Selection Criteria		Value		Score
1. Primary Firm Location, Workload and Size (Maximum 10 points)				
a. Proximity of firm to project site	Less than aa miles	5		
	aa miles to bb miles	2		
	More than bb miles	0		
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than $cc	2		
	$cc to $dd	1		
	More than $dd	0		
c. Number of licensed professionals	Less than ee professionals	gg	Max = 3	
	ee to ff professionals	hh		
	More than ff professionals	ii		
2. Primary Firm Qualifications (Maximum 30 points)				
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10		
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - jj	Max = 20	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - kk		
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - ll		
3. Key Consultant Qualifications (Maximum 20 points)				
a. Key discipline leads	Experience / ability of key consultants to perform effectively and collaboratively	0 - 15		
b. Proposed EDGE-certified Consultant participation*	One point for every 2 percent increase in professional services over the EDGE	0 - 5		

4. Overall Team Qualifications (Maximum 10 points)				
b. LEED** Registered / Certified project experience	Registered projects	1	Max = 2	
	Certified projects	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 oo projects	0 - 3		
	oo to pp projects	4 - 6		
	More than pp 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 qq projects	0 - 1		
	qq to rr projects	2 - 3		
	More than rr projects	4 - 5		
		Subtotal		

* Must be comprised of professional design services consulting firm(s) and NOT the lead firm
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4b. LEED Project Experience

- Key team members with LEED certification (LEED AP, LEED AP BD+C)
- Key team members with experience implementing/administering LEED projects
- Projects registered with USGBC
- LEED certified projects
- Volume/number of LEED registered/certified projects?

4c. BIM Project Experience

Architect / Engineer Selection Rating Form
State of Ohio Standard Forms and Documents

Project Name: Project Name
Project Number: Project Number
Proposer Firm: _____
City, State, Zip: _____

Selection Criteria		Value		Score
1. Primary Firm Location, Workload and Size (Maximum 10 points)				
a. Proximity of firm to project site	Less than aa miles	5		
	aa miles to bb miles	2		
	More than bb miles	0		
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than $cc	2		
	$cc to $dd	1		
	More than $dd	0		
c. Number of licensed professionals	Less than ee professionals	gg	Max = 3	
	ee to ff professionals	hh		
	More than ff professionals	ii		
2. Primary Firm Qualifications (Maximum 30 points)				
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10		
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - jj	Max = 20	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - kk		
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - ll		
3. Key Consultant Qualifications (Maximum 20 points)				
a. Key discipline leads	Experience / ability of key consultants to perform effectively and collaboratively	0 - 15		
b. Proposed EDGE-certified Consultant participation*	One point for every 2 percent increase in professional services over the EDGE	0 - 5		

4. Overall Team Qualifications (Maximum 10 points)				
c. BIM project experience	Training and knowledge	1	Max = 3	
	Direct project experience	3		

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 oo projects	0 - 3	
	oo to pp projects	4 - 6	
	More than pp 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 qq projects	0 - 1	
	qq to rr projects	2 - 3	
	More than rr projects	4 - 5	
* Must be comprised of professional design services consulting firm(s) and NOT the lead firm ** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute		**Subtotal**	

4c. BIM project experience

- Key team members with BIM experience
- BIM training/knowledge vs. BIM experience
- Depth of BIM experience
  - Design
  - Use of 3D presentation materials
  - Systems modeling/analysis
  - Clash detection
  - Quantity take-offs/estimating
  - Shop drawings
  - Construction administration

4d. Team organization

Architect / Engineer Selection Rating Form
State of Ohio Standard Forms and Documents

Project Name: Project Name
Project Number: Project Number
Proposer Firm: _____
City, State, Zip: _____

Selection Criteria		Value		Score
1. Primary Firm Location, Workload and Size (Maximum 10 points)				
a. Proximity of firm to project site	Less than aa miles	5		
	aa miles to bb miles	2		
	More than bb miles	0		
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than $cc	2		
	$cc to $dd	1		
	More than $dd	0		
c. Number of licensed professionals	Less than ee professionals	gg	Max = 3	
	ee to ff professionals	hh		
	More than ff professionals	ii		
2. Primary Firm Qualifications (Maximum 30 points)				
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10		
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - jj	Max = 20	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - kk		
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - ll		
3. Key Consultant Qualifications (Maximum 20 points)				
a. Key discipline leads	Experience / ability of key consultants to perform effectively and collaboratively	0 - 15		
b. Proposed EDGE-certified Consultant participation*	One point for every 2 percent increase in professional services over the EDGE	0 - 5		

4. Overall Team Qualifications (Maximum 10 points)			
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 oo projects	0 - 3	
	oo to pp projects	4 - 6	
	More than pp 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 qq projects	0 - 1	
	qq to rr projects	2 - 3	
	More than rr projects	4 - 5	
		Subtotal	

* Must be comprised of professional design services consulting firm(s) and NOT the lead firm
** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute

4d. Team organization

- Organizational chart included
- Roles and responsibilities defined:
  - Owner/Agency
  - Contracting Authority
  - Key team members (identify Consultants & EDGE)
- Clear lines of communication
- Main points of contact identified
- Defined transition of leadership between project phases

5a. Previous team performance

Architect / Engineer Selection Rating Form
State of Ohio Standard Forms and Documents

Project Name: Project Name
Project Number: Project Number
Proposer Firm: _____
City, State, Zip: _____

Selection Criteria		Value		Score
1. Primary Firm Location, Workload and Size (Maximum 10 points)				
a. Proximity of firm to project site	Less than aa miles	5		
	aa miles to bb miles	2		
	More than bb miles	0		
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than $cc	2		
	$cc to $dd	1		
	More than $dd	0		
c. Number of licensed professionals	Less than ee professionals	gg	Max = 3	
	ee to ff professionals	hh		
	More than ff professionals	ii		
2. Primary Firm Qualifications (Maximum 30 points)				
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10		
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - jj	Max = 20	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - kk		
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - ll		
3. Key Consultant Qualifications (Maximum 20 points)				
a. Key discipline leads	Experience / ability of key consultants to perform effectively and collaboratively	0 - 15		
b. Proposed EDGE-certified Consultant participation*	One point for every 2 percent increase in professional services over the EDGE participation goal	0 - 5		
4. Overall Team Qualifications (Maximum 10 points)				
a. Previous team collaboration	Less than mm sample projects	1	Max = 3	
	mm to nn sample projects	2		
	More than nn 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		
		Subtotal		

* Must be comprised of professional design services consulting firm(s) and NOT the lead firm
** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute

5a. Previous team performance

- Materials included in SOQ Sect. E, F, and H:
  - Excerpts/quotes
  - Letters of reference
  - Performance evaluations
- Specificity of comments
- Individuals specifically praised
- Level of service provided
- Date of reference provided
- Individual providing references

5b. Experience with similar projects

Architect / Engineer Selection Rating Form
State of Ohio Standard Forms and Documents

Project Name: Project Name
Project Number: Project Number
Proposer Firm: _____
City, State, Zip: _____

Selection Criteria		Value		Score
1. Primary Firm Location, Workload and Size (Maximum 10 points)				
a. Proximity of firm to project site	Less than aa miles	5		
	aa miles to bb miles	2		
	More than bb miles	0		
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than $cc	2		
	$cc to $dd	1		
	More than $dd	0		
c. Number of licensed professionals	Less than ee professionals	gg	Max = 3	
	ee to ff professionals	hh		
	More than ff professionals	ii		
2. Primary Firm Qualifications (Maximum 30 points)				
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10		
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - jj	Max = 20	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - kk		
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - ll		
3. Key Consultant Qualifications (Maximum 20 points)				
a. Key discipline leads	Experience / ability of key consultants to perform effectively and collaboratively	0 - 15		
b. Proposed EDGE-certified Consultant participation*	One point for every 2 percent increase in professional services over the EDGE participation goal	0 - 5		
4. Overall Team Qualifications (Maximum 10 points)				
a. Previous team collaboration	Less than mm sample projects	1	Max = 3	
	mm to nn sample projects	2		
	More than nn 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		

5. Overall Team Experience (Maximum 30 points)			
b. Experience with similar projects / delivery methods	Less than 4 projects	0 - 3	
	4 to 6 projects	4 - 6	
	More than 6 projects	7 - 10	

* Must be comprised of professional design services consulting firm(s) and NOT the lead firm ** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute	**Subtotal**	

5b. Experience with similar projects

- Review Relevant Project Experience Matrix F

F. RELEVANT PROJECT EXPERIENCE MATRIX

	Major Scope of Work requirements as identified in the project advertisement.									
	Scope:	Scope:	Scope:	Scope:	Scope:	Scope:	Scope:	Scope:	Scope:	Scope:
Example Project Name (Place "X" under Project Scope)										
1										
2										
3										

- How many projects have a majority of similar scopes of work?
- Also review Section H for additional information

5c. Budget and Schedule Management

Architect / Engineer Selection Rating Form
State of Ohio Standard Forms and Documents

Project Name: Project Name
Project Number: Project Number
Proposer Firm: _____
City, State, Zip: _____

Selection Criteria		Value		Score
1. Primary Firm Location, Workload and Size (Maximum 10 points)				
a. Proximity of firm to project site	Less than aa miles	5		
	aa miles to bb miles	2		
	More than bb miles	0		
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than $cc	2		
	$cc to $dd	1		
	More than $dd	0		
c. Number of licensed professionals	Less than ee professionals	gg	Max = 3	
	ee to ff professionals	hh		
	More than ff professionals	ii		
2. Primary Firm Qualifications (Maximum 30 points)				
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10		
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - jj	Max = 20	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - kk		
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - ll		
3. Key Consultant Qualifications (Maximum 20 points)				
a. Key discipline leads	Experience / ability of key consultants to perform effectively and collaboratively	0 - 15		
b. Proposed EDGE-certified Consultant participation*	One point for every 2 percent increase in professional services over the EDGE participation goal	0 - 5		
4. Overall Team Qualifications (Maximum 10 points)				
a. Previous team collaboration	Less than mm sample projects	1	Max = 3	
	mm to nn sample projects	2		
	More than nn 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)			
c. Budget and schedule management	Performance in completing projects within original construction budget and schedule	0 - 5	

* Must be comprised of professional design services consulting firm(s) and NOT the lead firm
** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute

Subtotal	

5c. Budget and Schedule Management

- Review Project Management Lead Resume
- Review Example Project pages
- Review Section H for additional information
  - Are there tables summarizing performance?
  - Are the performance metrics on relevant projects?
  - Are the performance metrics recent?
  - How biased are the chosen metrics?

5d. Knowledge of Ohio Process

Architect / Engineer Selection Rating Form
State of Ohio Standard Forms and Documents

Project Name: Project Name
Project Number: Project Number
Proposer Firm: _____
City, State, Zip: _____

Selection Criteria		Value		Score
1. Primary Firm Location, Workload and Size (Maximum 10 points)				
a. Proximity of firm to project site	Less than aa miles	5		
	aa miles to bb miles	2		
	More than bb miles	0		
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than $cc	2		
	$cc to $dd	1		
	More than $dd	0		
c. Number of licensed professionals	Less than ee professionals	gg	Max = 3	
	ee to ff professionals	hh		
	More than ff professionals	ii		
2. Primary Firm Qualifications (Maximum 30 points)				
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10		
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - jj	Max = 20	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - kk		
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - ll		
3. Key Consultant Qualifications (Maximum 20 points)				
a. Key discipline leads	Experience / ability of key consultants to perform effectively and collaboratively	0 - 15		
b. Proposed EDGE-certified Consultant participation*	One point for every 2 percent increase in professional services over the EDGE participation goal	0 - 5		
4. Overall Team Qualifications (Maximum 10 points)				
a. Previous team collaboration	Less than mm sample projects	1	Max = 3	
	mm to nn sample projects	2		
	More than nn 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		
5. Overall Team Experience (Maximum 30 points)				
d. Knowledge of Ohio Capital Improvements process	Less than 3 projects	0 - 1		
	3 to 6 projects	2 - 3		
	More than 6 projects	4 - 5		

* Must be comprised of professional design services consulting firm(s) and NOT the lead firm
** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute

Subtotal	

5d. Knowledge of Ohio Process

- Do the Project Management Lead, Project Admin. Lead, and Construction Admin. Staff have previous knowledge of State of Ohio capital improvement processes?
  - Use of Standard Agreements
  - Use of Standard Forms
  - Use of Standard Processes
  - Use of OAKS CI

Disclosure of Past Performance

- Has firm been responsive to past clients?

H. ADDITIONAL INFORMATION

34e. PROVIDE ANY ADDITIONAL INFORMATION REQUESTED BY THE CONTRACTING AUTHORITY. ATTACH ADDITIONAL SHEETS AS NEEDED.

DISCLOSURE OF PAST PERFORMANCE

The Lead Firm or Joint Venture and all Consultants identified in Section C shall disclose any lawsuits or claims initiated by public owners or requests to address issues on past projects by responding to the following questions. Summarize all team member firms on one page. Please indicate "none" for each firm when appropriate.

1. List any lawsuits, claims, or demands, related to the company or organization's participation on any public contract, during the past 5 years, whether the lawsuit, claim or demand was initiated by the public owner against the company or organization or initiated against the company or organization in its capacity as a subcontractor.

2. In the past five years, has the company or organization been requested by a public owner to return to address construction workmanship, performance, or installation issues. If yes, please state the project and type of contract, and describe your response to the request.

I. AUTHORIZED REPRESENTATIVE

All of the foregoing in Part I is a statement of facts.

35. SIGNATURE	36. DATE

37. NAME AND TITLE

F110-330v0814 [Insert Project Title / Firm Name] Page 22 of 23

General Challenges

- Lack of info. directly related to criteria
- Confusing or inconsistent info. within SOQ
- Incomplete forms/submission
  - EDGE Statement of Intent to Contract & Perform
- Overall submission length

Questions?

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LUNCH !