

Request for Qualifications (Design-Build Contract)

State of Ohio Standard Forms and Documents

Administration of Project: Local Higher Education

Project Name	Anderson and McFarland Halls Renovations	Response Deadline	11/02/12	3:30 PM	local time
Project Location	Miami University, Oxford Campus	Project Number	MUN-100023		
City / County	Oxford / Butler	Project Manager	Ted Christian		
Owner	Institution of Higher Education	Contracting Authority	Owner		
No. of paper copies requested (stapled, not bound) <u>6</u>		No. of electronic copies requested on CD (PDF) <u>1</u>			

Submit the requested number of Statements of Qualifications (Form F110-330) directly to Elizabeth Davidson, Director of Facilities Contracting at 181 Cole Service Building, Oxford, OH 45056. See Section H of this RFQ for additional submittal instructions.

Project Overview

A. Project Description

This Miami University Project will utilize the Design-Build project delivery method.

State Prevailing Wage requirements apply to this project.

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

Context

Miami University, an Institution of Higher Education deemed the "Owner/Contracting Authority" in this RFQ, houses approximately 7,100 undergraduate students in 41 buildings on the Oxford campus. The age of the buildings range from 7 years (Heritage Commons Student Apartments, 2005) to 183 years (Elliott Hall, 1829), with nearly half of the buildings built between 1956 and 1966, including Anderson Hall (1961) and McFarland Hall (1959). These two residence halls have not been subject to major renovations, though smaller improvement projects over the years have upgraded certain aspects of the building.

In 2010, Miami completed an in-depth, 20-year master plan for all on-campus student residence halls and dining facilities. While most of the existing residential facilities on campus have adequate structural integrity, most of the major systems are nearing the end of their life, and while the residence halls and dining facilities have been well maintained throughout the years, the majority of the residence halls have remained relatively unchanged in both the configuration of housing programs and amenities provided. The master plan identified four "tiers" of renovation, which increase in level of complexity, and are identified as Tier 1, Tier 2, Tier 2.5, and Tier 3.

The findings and recommendations of the master plan identify Anderson Hall and McFarland Hall to be renovated in accordance with Tier 2.5. Tier 2.5 includes the following scope of additions, replacements and upgrades: windows, ADA accessibility, elevator(s), ADA restroom(s), add insulation to exterior wall and attic, corridor ceilings, interior lighting, plumbing systems, sprinkler system, electrical distribution, HVAC systems, life safety and fire alarm systems, utility tie-ins, selective addition or demolition of bedroom demising walls, new bedroom finishes. Additionally, accommodation of student life programming elements such as community rooms, group study rooms, and other support spaces will be included.

Building Histories

Anderson Hall (Building ID # and Abbrev: 0002/AND) is located at 701 S. Oak St. ("South Quad") and was completed in September 1961. The hall was named after William C. Anderson, Miami's fourth president, who held office from 1849-1854. This residence hall has 49,749 gross square feet on 4 floors. There are 224 existing beds in Anderson Hall within 24 single rooms and 101 double rooms. As a result of this project, the new bed count will be approximately 199 beds, comprising 37 beds in singles (including Resident Assistant singles) and 162 beds in doubles, allowing for an increase in area in the smaller existing bedrooms where possible.

McFarland Hall (Building ID # and Abbrev: 0050/MCF) is located at 325 N. Tallawanda Road ("North Quad") and was completed in September 1959. This particular building was named for Robert White McFarland who was one of Miami's mathematics professors and the first president of new Miami. This residence hall has 37,592 gross square feet on 4 floors. There are 172 existing beds in McFarland Hall within 9 single rooms, 58 double rooms, 1 triple room, and 11

Request for Qualifications (Design-Build Contract) continued

quads. As a result of this project, the new bed count will be approximately 146 beds, comprising 9 beds in singles (including Resident Assistant singles) and 137 beds in doubles.

Criteria AE's Role

The University has selected CR Architecture + Design to perform the role of Criteria AE. In addition to the Basic Services under the standard Criteria AE scope of services, including verification and finalization of the University's Program of Requirements, it is the intent of the University to have the Criteria AE continue to advance the Design Criteria to a level consistent with approximately 50% Design Development.

Sustainability

The University's goal for the Anderson and McFarland Renovations is LEED-Silver Certification for both buildings. The University will register the Project with the US Green Building Council. The Criteria A/E will assist the University with establishing the targeted point-count as of the 50% Design Development stage. The Design Build firm will be responsible for completing the project according to LEED-Silver requirements, including the completion and filing of all documentation and payment of all associated certification fees.

B. Scope of Services

The selected Design-Builder ("DB"), as a portion of its required Scope of Services and prior to submitting its proposal, will discuss and clarify with the Owner and the Contracting Authority, the breakdown of the Agreement detailed cost components, to address the Owner's project requirements and refine the project schedule.

As required by the Agreement, and as properly authorized, provide the following categories of services: provide constructability review comments on documents produced by the Criteria A/E during the Schematic Design, Design Development, and Construction Document stages; develop and maintain estimates of probable construction cost, value engineering, project schedules, and construction schedules; lead and manage the Subcontract or Prequalification and Bidding process, Construction and Closeout Stage. Refer to the *Ohio Facilities Construction Manual* for additional information about the type and extent of services required for each. A copy of the standard Agreement can be obtained at the OFCC website at <http://ofcc.ohio.gov>.

It is understood that the preceding paragraph represents the entire range of services available to the University by the Design-Builder, but that the final scope of services will be negotiated and set forth in the Agreement.

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

Preconstruction Services: The DB will work cooperatively with the Contracting Authority and/or Owner, Criteria A/E and Project Team, and will provide, among other services, schedule development, estimate development, latter 50% design development, Guarantee Maximum Price (GMP) proposal, subcontractor prequalification and bidding, construction documents preparation, constructability review, permits, budgeting, value engineering, and preconstruction planning throughout the preconstruction stages. When the drawings and specifications are at a stage of completion specified in the Agreement, such partially completed documents (the "Basis Documents") shall be provided to the DB, together with the A/E of Record's detailed listing of any material incomplete design elements and the A/E of Record's statement of intended scope with respect to such incomplete elements (the "Design Intent Statement"). The DB shall submit to the Contracting Authority and/or Owner and the Criteria A/E their proposed Guaranteed Maximum Price (the "Contract Sum") and its qualifications and assumptions based upon the Basis Documents and the Design Intent Statement. The DB, the Contracting Authority and/or Owner and the Criteria A/E (along with selected engineers and consultants) shall meet to reconcile any questions, discrepancies or disagreements relating to the qualifications and assumptions, the Basis Documents or the Design Intent Statement. The reconciliation shall be documented by an addendum to the qualifications and assumptions that shall be approved in writing by the Contracting Authority and/or Owner, the Criteria A/E and the DB. The DB shall then submit to the Contracting Authority, for approval, the CM's proposed final Contract Sum based upon the Basis Documents, the approved qualifications and assumptions and the Design Intent Statement. Contingent upon the Contracting Authority's approval of the final Contract Sum (GMP Amendment), the parties will enter into an amendment to the Agreement establishing the Contract Sum. The final negotiated Contract Sum shall not exceed the Project Budget established for construction. If the proposed Contract Sum exceeds such budget, then the Contracting Authority may terminate its agreement with the DB and seek from other firms, bids for completion of the Project.

Construction Services: The DB shall construct the Project pursuant to the construction documents and in accordance with the schedule requirements. The DB shall hold all subcontracts and shall be fully responsible for the means and methods

Request for Qualifications (Design-Build Contract) continued

of construction, construction execution, progress schedule, weekly progress meetings, testing and inspection, project safety, LEED certification, project completion within the schedule agreed upon in the preconstruction phase, compliance with all applicable laws and regulations including monitoring compliance with all EDGE, equal employment, and prevailing wage requirements, and submitting monthly reports of these activities to the Contracting Authority. All subcontracts shall be on the subcontract form prescribed by OAC Section 153:1-03-02. The Contracting Authority reserves the right to approve the DB's selection of subcontractors and any supplement terms to the form subcontract.

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

1. College/University Housing Experience
2. Major Building Renovation Experience
3. Design-Build Delivery Method Experience
4. LEED Documentation and Certification Experience
5. Simultaneous Construction/Renovation of Multiple Buildings on Non-contiguous Sites

C. Funding / Estimated Budget

Total Project Cost	<u>\$20,000,000.00</u>	State Funding	<u>\$0.00</u>
Construction Cost	<u>\$17,000,000.00</u>	Other Funding	<u>\$20,000,000.00</u>

D. Anticipated Schedule

DB Services Start (mm/yy)	<u>01 / 13</u>
Construction Stage Start (mm/yy)	<u>04 / 13</u>
DB Services Completed (mm/yy)	<u>07 / 14</u>
Contract Completed (mm/yy)	<u>07 / 14</u>

E. EDGE Participation Goal

Percent of Total Subcontracts Awarded	<u>5%</u>
Percent of Initial Design Services Fee	<u>5%</u>
Percent of Design-Build Compensation	<u>5%</u>

F. Evaluation Criteria for Selection

Selection Criteria:

The DB will be selected using (i) a qualification based selection process during the initial Request for Qualifications (RFQ) stage to develop a short list and (ii) a best value selection process during the final Request for Proposal (RFP) stage for the final DB selection. The qualifications-based selection criteria for the RFQ is included in this announcement.

Short List:

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

Request for Proposal:

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

Pre-Proposal Meeting:

Prior to submitting a response to the RFP, the short-listed firms will be invited to meet individually with the Contracting Authority and the Owner. The purpose of the pre-proposal meeting is to permit the short-listed firms to ask the Contracting Authority and the Owner questions in an individual setting to help the firms prepare their responses to the RFP. The pre-proposal meeting will be held at the Oxford Campus of Miami University. The Contracting Authority will notify each short-listed firm to schedule individual times for the pre-proposal meetings.

Interview:

After submitting responses to the RFP, the short-listed firms will be interviewed by the Contracting Authority and representatives of the Owner. The purpose of the interview will be to meet the proposed Project team, become familiar

Request for Qualifications (Design-Build Contract) continued

with key personnel, and understand the project approach and ability to meet the stated objectives for the Project. Please be prepared to discuss with specificity the firm's capacity to conduct this work in compliance with the timetable, budget and EDGE expectations. The Contracting Authority will notify each short-listed firm to schedule individual times for the interviews.

Selection Schedule:

Tentative schedule is subject to change.

Request-for-Qualifications Phase

RFQ Distribution	Week of October 15, 2012
RFQ Question Submission Deadline	Friday, October 26, 2012
RFQ Clarification Issued	Tuesday, October 30, 2012
RFQ Submission Deadline	Friday, November 2, 2012 – 3:30pm EST
Identification of a Short-list of Respondents	Friday, November 16, 2012

Request-for-Proposals Phase

RFP Distribution	Week of November 26, 2012
Pre-Proposal Meeting	Week of December 3, 2012
Proposals Due	Friday, December 21, 2012
Interviews	Week of January 14, 2013
Notice of Intent to Award	Week of January 21, 2013

Cancellation and Rejection:

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

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

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

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

H. Submittal Instructions

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

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

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

Submit all questions regarding this RFQ in writing to Elizabeth Davidson at davidsea@muohio.edu with the project name and number included in the subject line (no phone calls please). Questions will be answered and posted to the OAKS Capital Improvements (OAKS CI) website at <http://ci.oaks.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.

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

1. Summary: Provide a summary, on one page or less, describing why your firm/team is the most qualified for the Project.

Request for Qualifications (Design-Build Contract) continued

2. Bonding/Insurance: Provide evidence of capacity to provide bonding in the amount of the project budget and a copy of the firm's certificate of insurance showing the firm's current limits of liability for commercial general liability, employer's liability, business automobile liability and professional liability.
3. Management Systems: Describe the scheduling and cost control systems the firm would propose to use for the Project
4. Self-Performed Work: Indicate whether the firm intends to self-perform any work on the Project through a competitive process and, if so, the nature of the work and capability to self-perform.
5. Estimating: Demonstrated track record of performance of in-house estimating on projects comparable to the Project.
6. Scheduling: Demonstrated track record of performance of managing projects to the original schedule.

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

LEED Credentials: Leadership in Energy & Environmental Design (Green Building Certification Institute)

GA: Green Associate

AP: LEED AP (Legacy LEED Accredited Professional without specialty)

AP +: (see below):

LEED AP BD+C (Building Design and Construction specialty)

LEED AP ID+C (Interior Design and Construction specialty)

LEED AP O+M (Operations and Maintenance specialty)

LEED AP ND (Neighborhood Development specialty)

LEED AP Homes (Specialty for residential LEED construction)

Other Industry Credentials

CCCA: Certified Construction Contract Administrator (CS)

CCM: Certified Construction Manager (CMAA)

CCS: Certified Construction Specifier (CSI)

CDT: Construction Document Technologist (CSI)

DBIA: Design-Build Institute of America

Design-Build Selection Rating Form

State of Standard Forms and Documents

Project Name Anderson & McFarland Halls Renovations Proposer Firm _____
 Project Number MUN-100023 City, State, Zip _____

Selection Criteria		Value	Score
1. Primary DB Location Workload (Maximum 10 points)			
a. Proximity of DB's office where the majority of work will be performed to the principal project site	Less than 60 miles from project site	4 - 5	
	60 miles to 125 miles from project site	2 - 3	
	More than 125 miles from project site	0 - 1	
b. Amount of contracts awarded by the Contracting Authority to the DB in the previous 24 months (exclude projects on hold)	Less than \$25M in previous 24 months	5	
	\$25M to \$50M in previous 24 months	2	
	More than \$50M in previous 24 months	0	
2. Primary DB Qualifications (Maximum 35 points)			
a. Project Management Lead (e.g., education, experience, credentials)	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10	
b. Project Administrative Staff (e.g., superintendent, project engineer, administrative support)	Experience / knowledge of project admin staff to achieve owner's vision and requirements	0 - 5	
c. Project Design Lead (e.g., awards, publications)	Experience / creativity of lead designer	0 - 5	
d. Construction Technical Staff (e.g., scheduling / estimating, education, experience, credentials)	Experience / ability of construction technical staff to fully coordinate estimate and schedule	0 - 5	
e. Design Technical Staff (e.g., BIM/CAD capabilities education, experience, CDT or CCS* credentials)	Experience / ability of technical staff to develop quality construction documents	0 - 5	
f. Construction Administration Staff (e.g., education, experience, CDT, CCM, or CCCA* credentials)	Experience / ability of field representatives to identify and solve issues during construction	0 - 5	
3. Key Consultant Qualifications (Maximum 15 points)			
a. Key Consultants (e.g., architectural, civil, mechanical, or electrical engineering, roofing or other specialty consultants)	Experience / ability of key consultants to perform effectively and collaboratively	1 - 10	
b. Proposed EDGE-certified Consultant Participation** (fully executed Statements of Intent to Contract and Perform with relevant EDGE firms)	One additional point for every 2 percent increase in professional services over the advertised EDGE participation goal	0 - 5	
4. Overall Team Qualifications (Maximum 10 points)			
a. Previous Collaboration of the Project Team (sample projects on which a significant number of individual team members have worked together)	Less than 3 sample projects	0	
	3 to 5 sample projects	2	
	More than 5 sample projects	3	
b. LEED*** Training / Professional Accreditation (demonstrated either by the DB or relevant consultant)	LEED*** Credentials* (Maximum 3 points)	GA	1
		AP	2
		AP+	3
c. LEED*** Registered / Certified Project Experience (demonstrated either by the DB or relevant consultant)	LEED*** Registered Projects (RP) or LEED*** Certified Projects (CP) (Maximum 2 points)	RP	1
		CP	2
d. Team Organization (showed formal relationships between owner, contracting authority, consultants)	Clarity of responsibility / communication demonstrated by table of organization	0 - 2	
5. Overall Team Experience (Maximum 30 points)			
a. Past Performance of the Project Team (provided reference letters from sample project contacts)	Past performance as indicated by CM evaluations and letters of reference	0 - 10	
b. Experience with similar projects and Design-Build project delivery method	Less than 5 projects	0 - 3	
	5 to 10 projects	4 - 6	
	More than 10 projects	7 - 10	
c. Budget and Schedule Management (included data on estimate versus bid and original contract sum & time versus change orders for sample projects)	Performance in completing projects within original construction budget and schedule	0 - 5	
d. Knowledge of Ohio Capital Improvements Process (e.g., experience following <i>The OFC Manual</i> , the Standard Requirements, and ORC Chapter 153)	Less than 5 projects	0 - 1	
	5 to 10 projects	2 - 3	
	More than 10 projects	4 - 5	
* Refer to list of applicable credentials in Section H of the RFQ ** Must be comprised of consulting firm(s) and NOT the lead firm of the DB entity *** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute		Subtotal	

Notes:

Evaluator:

Name _____

Signature _____ Date _____