

Request for Qualifications (Program Management Services)

State of Ohio Standard Forms and Documents

Administration of Project: Local Higher Education

Project Name	<u>Center for Innovation in Health Professions</u>	Response Deadline	<u>January 25, 2013 2:00 PM</u> local time
Project Location	<u>2112 Euclid Avenue</u>	Project Number	<u>LF-1207 / CLS-131207</u>
City / County	<u>Cleveland / Cuyahoga</u>	Project Manager	<u>Jack Baumann</u>
Owner	<u>Cleveland State University</u>	Contracting Authority*	<u>Cleveland State University</u>

*The Contracting Authority for OFCC-administered projects is OFCC. The Contracting Authority for locally administered projects is the Owner.
No. of paper copies requested (stapled or bound) 5 -
not bound Tabbed No. of electronic copies requested on CD (PDF) 1

Submit the requested number of Statements of Qualifications (Form F110-330) directly to Cleveland State University, Attention: Jack Baumann Baughman, Division of Capital Planning, 1802 E. 25th Street, PS 219, Cleveland, Ohio 44115-2214 or electronically to j.l.baumann@csu.ohio.edu. See Section H of this RFQ for additional submittal instructions.

Project Overview

A. Project Description

Cleveland State University (CSU) is seeking qualified firms to submit qualifications related to Program Management and Oversight Services associated with the Center for Innovation in Health Professions (CIHP) building. As a part of the Program Management team, CSU is requesting a Diversity Consultant as part of the team to achieve the university's goals.

The facility will provide the University an identity and presence it has never had by bringing together medical programs in one building; expanding the opportunity to encourage collaboration across disciplines. In addition a new partnership with NEOMED will allow for a permanent presence for the medical school on CSU's campus.

The University has concluded an internal building planning study and is selecting the A/E and Construction Manager at Risk for the project. During the first 6 weeks of the A/E's contract, they will perform a program validation study. The proposed building is programmed at approximately 100,000 gsf and will include simulation labs, classrooms, offices, public atriums/spaces, and various flexible research areas.

The new Center will be located on approximately 1.7 acres where Viking Hall and Wolfe Music Building (also known as the Kinko's Building) are currently located. The site is bounded by Euclid Ave. to the north, Prospect Ave. to the south, E.21st Street to the west, and E.22nd Street to the east. Currently, the demolition and abatement of the two existing buildings, parking lots, and site amenities are being performed under a separate contract. This portion of the project will be completed prior to the start of the CIHP contracts and is being managed by the Office of the University Architect.

In addition to the A/E and CMR firm, separate consultants will be contracted with CSU for a Commissioning Agent.

The selected Program Management firm will be a key member of the executive project team for CIHP. The selected Program Management firm will not be eligible for either A/E or CMR contracts for projects managed within this program. The executive team members and their roles are listed below:

- Owner: CSU – including Office of the University Architect; Facilities & Safety; Vice President of Business Affairs and Finance; Office of the Provost and the Office of the President.
- The Owner will be responsible for overall planning, programming and prioritization decisions for the project. In addition, the Owner (working with consulting architects) will be responsible for space planning and programming decisions for the above projects, concept design and schematic design acceptance and budget approvals.
- Program Manager: On behalf of the owner, the Program Manager will assist in coordinating many aspects of the work provided by the executive team, ensure that alternatives are identified and properly analyzed, and other information needed for owner decisions is prepared and presented in a timely manner. The specific scope items are defined later in this RFQ.

A Pre-Proposal Meeting will be held on January 11, 2013, 1:00 p.m., in Room 242, CSU Plant Services Building, 1802 E.25th Street, Cleveland, Ohio 44225. This meeting will provide an overview of the project and an opportunity for questions. This pre-proposal meeting will provide the only public forum for potential applicants and team members to view the site and ask questions of the client and the Office of the University Architect prior to the submission deadline.

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The project will be registered with the USGBC for minimum Silver LEED certification. The Program Manager must demonstrate a thorough understanding, experience, and commitment to LEED design and is responsible for executing the design and meeting LEED goals as set forth by the University.

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.

B. Scope of Services

CSU is seeking the services of a firm or firms with experience facilitating and managing the implementation of substantial university project utilizing university funds; establishing the procedures and protocols; assembling and coordinating the efforts of programming, planning and delivery teams; organizing and advertising the project; managing the university's projects process within State of Ohio guidelines; and assist the University in achieving its diversity and local participation goals. This firm shall have the experience and capabilities of providing/managing an array of services including, but not limited to those listed below. 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. Managing projects utilizing the Construction Manager at Risk within the state of Ohio's Construction Reform rules and regulations.
2. Project Budgeting and Development of Scope of Services
3. Overall Program Scheduling and Management
4. Advising on Project Delivery Structure and Scopes of Services
5. Project Oversight and Management
6. University Stakeholder Engagement and Communication Coordination
7. Project Implementation and Post Occupancy Evaluation
8. Diversity Goal Setting
9. Project Accounting and Budget Reconciliation
10. Managing project utilizing OAKS CI Experience

The selected Program Manager as a portion of its required Scope of Services and prior to submitting its proposal, will discuss and clarify with the Contracting Authority and/or Owner, the breakdown of the Agreement detailed cost components, to address the Owner's project requirements and refine the project schedule. 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: provide constructability review comments on documents produced by the A/E during the Schematic Design, Design Development, and Construction Document stages; develop and maintain estimates of probable construction cost, value engineering, project schedules, and construction schedules; lead and manage the 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>.

The CMR and the A/E will be performing parallel cost estimates and will be required to reconcile their respective construction estimates at each phase of the design process up to final bid documents. These estimates will be provided at the Schematic Design (SD) Phase, Design Development (DD) Phase, and a minimum of two (2) Construction Document (CD) Phase estimates prior to going out to bid. The Program Manager is to oversee and advise the CMR and A/E during this process.

Preconstruction Services:

The Program Manager will work cooperatively with the Contracting Authority and/or Owner, CMR, A/E and Project Team, and will provide, among other services, the following:

1. Facilitation of weekly Owner, A/E, and CMR meetings
2. Facilitation of internal Owner user group meetings for updates, coordination with A/E needs, and presentations
3. Oversight and monitoring cost estimates developed by the A/E and CMR
4. Manage project soft costs in conjunction with the Owner
5. Procurement management

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6. Review, inventory, and document existing FF&E that may be reused from existing spaces on campus to the new CIHP building.
7. Manage project contingencies in conjunction with the Owner
8. Manage consultant pay applications and change orders
9. Project cost accounting and budget reconciliation
10. Oversight and advising on value engineering
11. Constructability support of documents prepared by A/E in conjunction with the CMR review at each phase of development
12. Review schedules produced by A/E and CMR
13. Review estimates produced by A/E and CMR
14. Bid package preparation support for bid reviews, evaluation, and recommendation on FF&E documents developed by A/E
15. Bid package preparation support for bid reviews, evaluation, and recommendation
16. Weekly reporting to the University on all aspects of the project

Multiple bid packages will be developed by the A/E and CMR to “fast track” the design and construction. The Program Manager is to work with the A/E and CMR to coordinate estimating, bidding, and construction of these separate packages. The Program Manager shall oversee and manage the Contract Sum (GMP) process between the A/E and CMR until approval of the final Contract Sum by the Contracting Authority.

During the Preconstruction Services, the Program Manager shall oversee and manage the CMR and the A/E on Building Information Modeling (BIM) for the project to prepare for the Construction Services phase of the Project.

Construction Services:

During the construction period, provide on-site construction administration services each week for a total of 40hrs/week, not including travel time to and from the site, include:

1. On-site representation comprised of the Program Management and its consultant staff involved in the project, all having relevant and appropriate types of construction administration experience
2. Attendance at all progress meetings
3. Written daily observation reports
4. Project photo documentation
5. Review, monitor, and document project schedules produced by CMR
6. Review of Requests for Information (RFI)
7. Review of shop drawings and submittals in conjunction with the CMR and A/E review
8. Review and documentation of change orders
9. Review and documentation of pay applications
10. Manage project construction (hard) costs to predetermined budget set by the University
11. Manage project soft costs in conjunction with the Owner
12. Manage project contingencies in conjunction with the Owner
13. Weekly reporting to the University on all aspects of the project

Diversity Consulting:

Through the Program Manager's services, CSU will require the support of a company that has extensive experience in Diversity Consulting for construction projects in the Northeast Ohio market place to assist the University in achieving its goals for the project. The Diversity Consultant will work closely with the team to identify, monitor, and report contractor participation to meet the University's goals.

Services that the Diversity Consultant shall provide are:

- A. Identify potential subcontractors and suppliers
 - a. Engage with the CMR to identify types of services/trades sought and establish a protocol for tracking participation
 - b. Outreach to local services/trades
 - c. Ability to pre-qualify diverse suppliers if needed, and assist in obtaining required certifications from the State of Ohio and other certifying agencies
 - d. Work with the CMR and pre-qualified suppliers during the bidding phase
- B. Monitor EDGE, DBE, SBE, FBE, VBE, minority workforce, and local workforce participation
 - a. Work with established University goals for participation

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- b. Track data for contractors and workforce on the Project
- c. Report to CSU and CMR on any variations from established goals in a timely fashion
- C. Report data gathered to Cleveland State University representatives monthly
 - a. EDGE, DBE, SBE, FBE, VBE, minority workforce, and local workforce goals and results
 - b. Largest suppliers (by contract size)

The Diversity Consultant shall attend internal coordination meetings with the University, the Program Manager, the CMR, and the A/E during key points of the project to discuss and review the above services. The consultant shall conduct outreach meetings/seminars to services and trades, with the University Representative, the Program Manager, and the CMR present. They shall also participate and present at all pre-bid meetings, scope review meetings, and pre-construction meetings.

C. Funding / Estimated Budget

Total Project Cost	<u>\$45,000,000</u>
Construction Cost	<u>\$35,000,000</u>
State Funding	<u>\$0</u>
Other Funding	<u>\$45,000,000</u>

D. Anticipated Schedule

Services Start (mm/yy)	<u>2 / 2012</u>
Construction Contracts Start (mm/yy)	<u>08 / 2013</u>
Services Completed (mm/yy)	<u>05 / 2015</u>
Construction Contracts Completed (mm/yy)	<u>01 / 2015</u>

E. EDGE Participation Goal

Percent of *initial* TOTAL Fee 5%

F. Evaluation Criteria for Selection

- Demonstrated ability to meet Owner's programmed project vision, scope, budget, and schedule on previous projects.
- Previous experience compatible with the proposed project (e.g., type, size).
- Relevant past work of prospective firm's proposed consultants.
- Past performance of prospective firm and its proposed consultants.
- Qualifications and experience of individuals directly involved with the project.
- Proposer's previous experience (numbers of projects, sizes of projects) when working with its proposed consultants.
- Specification writing credentials and experience.
- Experience and capabilities of creating or using Critical Path Method (CPM) schedules and of using CPM schedules as a project management resource.
- Approach to and success of using partnering and Alternative Dispute Resolution.
- Proximity of prospective firms to the project site.
- Proposer's apparent resources and capacity to meet the needs of this project.

The university is seeking a firm (or team) with a broad range of skills in facilitating decisions and managing the process of the CIHP project. Special attention will be paid to experience in the college and university setting. The CSU project will be funded with public bonds. Therefore, experience related to construction and renovation projects utilizing State of Ohio public financing will be strongly considered along with experience with large and complex projects financed through alternative funding mechanisms, among other relevant factors, in selecting a company that will provide the best services to CSU under this RFQ. CSU will expect the firm to assist with University stakeholder engagement and coordination.

Please provide CSU a written response to the following questions. Responses that do not follow the format of this RFP and do not provide the information requested may not be considered. Provide the responses in Section H of SAO Form 110-330.

1. Provide complete name, business address, phone number and web address of the submitting firm(s).
2. Provide year established and a brief history and overview of the firm.
3. List not more than two principals from the submitting firm who may be contacted. List name, title, and contact telephone number. Listed principals must be empowered to speak for the firm on policy and contractual matters.
4. Provide total number of personnel and describe the overall capacity of the firm. Briefly describe your commitment to provide and maintain professionally qualified personnel throughout the duration of the program.
5. Describe the professional disciplines within the firm and the firm's overall capabilities with respect to the proposed services.
6. If the firm intends to provide any services through a joint venture, professional affiliation or outside consultants, please indicate which services and the proposed team including names and one page overview of all partner firms, professional affiliates and/or outside consultants.

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7. Summarize financial viability and longevity of the firm. Indicate approximate volume of work and number of projects delivered in the past two (2) years.
8. List at least three (3) educational institutions/clients for which your firm has provided similar capital projects program planning services, including client name, title and contact information. Indicate whether the projects were funded through public or private project financing. Provide a case study for each project.
9. Describe your firm's experience with large capital bond programs, including, but not limited to, types of bonds, accounting for different bond series, familiarity with compliance related to bond expenditures, as well as processes and systems for assisting the University with compliance matters, and proper documentation and reporting.
10. Describe your firm's experience with large corporate or other privately funded capital programs and projects, including, but not limited to, types of financing, any related accounting and covenant compliance experience, as well as processes and systems for assisting the corporate or private client in any financial, covenant or other compliance matters, and proper documentation and reporting.
11. Describe how your team would anticipate staffing this assignment at each phase of the project.
12. Describe your firm's previous experience working with Cleveland State University, if any.
13. Describe your firm's experience with the management of other construction management companies and the CM at risk delivery model.
14. Describe your firm's commitment to, experience with and capabilities with regard to high performing, sustainable higher education building and LEED.
15. Describe your firm's experience in identifying diverse suppliers (EDGE, FBE, DBE, SBE, VBE) to bid on projects. Describe how supplier diversity goals have been met.
16. Identify your firm's professional liability claims insurance limits.
17. Please describe the type of fee arrangement your firm would propose for services including a list of any reimbursable expenses and markups.
18. Please identify and provide resumes of key individuals who would be assigned to this project.
19. Please indicate your earliest availability or the amount of time you would require to commence a project as set forth above.
20. Provide through narrative discussion the reasons why your firm is especially qualified to undertake this assignment. Respondents may include anything they wish in support of their qualifications; however the response should be limited to no more than four (4) pages.

Conciseness and clarity of response is strongly encouraged. Therefore the response to this RFQ should be no more than twenty (20) pages in length, single-sided, minimum of one (1) inch margins and eleven (11) pt font. Responses shall include acknowledgement that the firm has reviewed and understands the information and data provided in the Request for Qualifications. A principal of the firm must sign the completed response and affirm that the information provided is true, complete and accurate.

CSU will evaluate the Proposals received which meet the submittal requirements listed in this document. CSU may contact respondents for clarification or additional information at its sole discretion.

A list of short-listed firms will be compiled and presentations by the firms will occur February 2013 (exact day and time will be confirmed). CSU anticipates that three firms will be short-listed but the number may be greater or less depending on the review of the qualifications submissions.

Award of a contract may be made solely on the basis of the qualifications submissions.

Interested 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 team. The Intent to Contract and to Perform and / or waiver request letter and Demonstration of Good Faith Effort form(s) with complete documentation must be attached to the Proposal. Both forms can be accessed via the OFCC website at <http://ofcc.ohio.gov>. The Intent to Contract and to Perform form is again required at the Fee Proposal stage.

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

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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 Jack Baumann at j.l.baumann@csuohio.edu with the project 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.

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 EBO+M (Existing Buildings, 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 (CSI)
CCM: Certified Construction Manager (CMAA)
CCS: Certified Construction Specifier (CSI)
CDT: Construction Document Technologist (CSI)
DBIA: Design-Build Institute of America

Program Management Services Selection Rating Form

State of Ohio Standard Forms and Documents

Project Name Center for Innovation in Health Professions Proposer Firm _____
 Project Number LF-1207 / CLS-131207 City, State, Zip _____

Selection Criteria		Value	Score
1. Primary Firm Location, Size, and Workload (Maximum 10 points)			
a. Proximity of primary firm's office where the majority of work will be performed to the principal project site	Less than 50 miles from project site	4 - 5	
	50 miles to 100 miles from project site	2 - 3	
	More than 100 miles from project site	0 - 1	
b. Amount of fees awarded by the Contracting Authority to the primary CM firm in the previous 24 months (exclude projects on hold)	Less than \$250k in previous 24 months	5	
	\$250k to \$500k in previous 24 months	2	
	More than \$500k in previous 24 months	0	
2. Primary Qualifications (Maximum 30 points)			
a. Project Management Lead (e.g., education, experience, credentials)	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10	Max = 20
b. Project Administration Lead (e.g., awards, publications, appropriateness, innovation)	Experience / creativity of project admin staff to achieve owner's vision and requirements	0 - 5	
c. Technical Staff (e.g., BIM/CAD capabilities / scheduling / estimating, education, experience, CDT or CCS* credentials)	Experience / ability of technical staff to fully coordinate construction documents	0 - 5	
d. Construction Administration Staff (e.g., education, experience, CDT or CCA* credentials)	Experience / ability of field representative to identify and solve issues during construction	0 - 10	
3. Key Consultant Qualifications (Maximum 20 points)			
a. Key Consultants	Experience / ability of key consultants to perform effectively and collaboratively	1 - 15	
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 4 sample projects	1	
	4 to 6 sample projects	2	
	More than 6 sample projects	3	
a. LEED*** Training / Professional Accreditation (demonstrated either by the primary firm or relevant consultant)	LEED*** Credentials* (Maximum 3 points)	GA	1
		AP	2
		AP+	3
c. LEED*** Registered / Certified Project Experience (demonstrated either by the primary firm 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 evaluations and letters of reference	0 - 10	
b. Experience with similar projects and anticipated project delivery method (CM at Risk)	Less than 4 projects	0 - 3	
	4 to 6 projects	4 - 6	
	More than 6 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	
a. Knowledge of Ohio Capital Improvements Process (e.g., experience following <i>The OFC Manual</i> , the Standard Requirements, and ORC Chapter 153)	Less than 2 projects	0 - 1	
	2 to 3 projects	2 - 3	
	More than 4 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 primary CM firm *** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute		Subtotal	

Notes:

Evaluator:

Name _____

Signature _____ Date _____