

# Request for Qualifications (Educational Planning Services)

## State of Ohio Standard Forms and Documents

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**Administration of Project:** Ohio Facilities Construction Commission (OFCC)

Project Name	<u>OFCC Educational Planning Consultant List</u>	Response Deadline	<u>03/02/2016</u>	<u>4:00 p.m.</u>	local time
Project Location	<u>Various K-12 School Districts</u>	Project Number	<u>SFC-150888</u>		
City / County	<u>Various / Various</u>	Project Manager	<u>Various</u>		
Owner	<u>Various K-12 School Districts</u>	Contracting Authority	<u>OFCC</u>		
No. of paper copies requested (stapled, not bound)	<u>0</u>	No. of electronic copies requested (PDF)	<u>1</u>		

Submit the requested number of Statements of Qualifications (Form F110-330) at [Jill.Hoobler@OFCC.Ohio.gov](mailto:Jill.Hoobler@OFCC.Ohio.gov)

Submit all questions regarding this RFQ in writing to Jill Hoobler at [Jill.Hoobler@ofcc.ohio.gov](mailto:Jill.Hoobler@ofcc.ohio.gov) 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.

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### Project Overview

#### A. Project Description

The Ohio Facilities Construction Commission (OFCC) intends to pre-qualify firms to provide educational planning services. The current OSFC Educational Planning Consultant contracts expire on June 30, 2016. In order for any firm with a current contract to be considered in the selection process for future contracts, they must reapply. This process will be used to award contracts for the period beginning July 1, 2016 and ending June 30, 2018. OFCC reserves the right to extend service through June 30, 2019.

Services are in support of the OFCC planning, design, and management of projects for local K-12 school districts.

The number of educational planning consultant contracts awarded through this process is within the discretion of OFCC. If a firm is awarded a contract, OFCC does not guarantee that a firm will be awarded any work or make a representation of the amount of work a firm may receive within the two-year contract period.

#### B. Scope of Services

The scope of work will include, without limitation, educational planning services related to K-12 and Career Technical facilities, standards and specifications for the design of school facilities, educational adequacy analysis, district educational visioning and transformation services, master facilities planning, training, and development of educational planning tools to assist districts in the planning process. Selected consultants will also be required to participate in 21st Century Education Workshops and the OSFC 21C Studio, an online learning community.

The selected Consultant, as a portion of its required Scope of Services and prior to submitting its technical and fee proposals, will discuss and clarify with the OFCC, the cost breakdown of the Agreement detailed cost components to address the project requirements.

As required by the Agreement, and as properly authorized, provide the following categories of services: Master Planning, Visioning, Program of Requirements Development, Meeting / Charrette Facilitation, Educational Adequacy Analysis, and any Additional Services as agreed upon as provided by the Consultant and their sub-consultants all having relevant experience for this project type.

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

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. Experience performing Educational Master Planning
2. Experience facilitating Educational Planning Charrettes
3. Experience leading Educational Visioning Workshops
4. Experience analyzing Facility Condition Assessment Data
5. Experience analyzing Enrollment Projection Data
6. Experience developing Programs of Requirements

**Request for Qualifications (Educational Planning Services) continued**

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- 7. Knowledge of 21st Century Learning Environments
- 8. Knowledge of Student Centered Learning Environments
- 9. Knowledge of School Facilities Commission processes
- 10. Knowledge of Funding Strategy Development

**C. Funding / Estimated Budget**

Total Project Cost	<u>Varies</u>	State Funding	<u>Varies</u>
		Other Funding	<u>Varies</u>

**D. Services Required** (see note below)

Primary	<u>Educational Master Planning</u>
Secondary	<u>Planning Charrette Facilitation</u>
	<u>Educational Visioning Services</u>
	<u>Educational Adequacy Analysis</u>
	<u>Architectural Programming</u>
Others	<u>Development of standards and specifications for design of school facilities</u>

**E. Anticipated Schedule**

Planning Services Start (mm/yy)	<u>07 / 16</u>
Planning Services Completed (mm/yy)	<u>Varies</u>

**F. EDGE Participation Goal**

Percent of <i>initial</i> TOTAL Fee	<u>0%</u>
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**G. Evaluation Criteria for Selection**

The evaluation of the statement of qualifications will be based primarily on the following: (1) competence of the firm to perform the required services, as indicated by the technical training, education and experience of the firm's personnel who are likely to be assigned to perform the planning services; (2) ability in terms of workload and availability of qualified personnel, equipment, and facilities to perform the required planning services competently and expeditiously; (3) experience of the proposed personnel in performing planning services; (4) past performance as reflected in evaluations of previous clients with respect to factors such as quality of work and meeting deadlines; and (5) other similar factors.

**H. Submittal Instructions**

Statements of qualifications should include the names of the firm owners; number of years in business and firm history; the types of specialty services offered; the education and experience of the owners and key technical personnel; the technical expertise of the firm's current staff; the firm's experience in performing educational planning services; availability of planning staff; the firm's equipment and facilities; current or ongoing projects; and references.

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

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

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

Facsimile or e-mailed copies of the Statement of Qualifications will not be accepted.

The following special instructions apply to completing the F110-330 form for this selection:

- Firms are requested to list the Project No. (indicated on Page 1 of this RFQ) on the first page of Part I and on Part II of the F110-330.
- Firms are requested to indicate their EDGE-certified business status as either "Certified" or Non-certified" on Part I Section C (Proposed Team).
- Do not submit Page 3 of Section H (Commitment to Participate in the EDGE Business Assistance Program).

## Request for Qualifications (Educational Planning Services) continued

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Firms are requested to identify professional registrations, memberships and credentials including but not limited to: CEFP, REFP, and any other appropriate planning industry credentials. Identify that information on the resume page for individual team members in Block 22, Section E of the F110-330 form.

A4LE Credentials: Association for Learning Environments

CEFP (Certified Educational Facility Planner) REFP  
(Recognized Educational Facility Planner) ALEP  
(Accredited Learning Environment Planner)

# Educational Planning Services Selection Rating Form

## State of Ohio Standard Forms and Documents

Project Name OFCC Educational Planning Consultant List Proposer Firm \_\_\_\_\_  
 Project Number SFC-150888 City, State, Zip \_\_\_\_\_

Selection Criteria	Value	Score	
<b>1. Primary Planning Firm Location and Size (Maximum 15 points)</b>			
a. Location of planning firm and EDGE-certified status	Out of State	0	
	Ohio firm	5	
	EDGE Certified	10	
b. Number of relevant planning professionals within primary firm available to perform the work	Small = Less than 5 planning professionals	5	
	Medium = 5 to 10 planning professionals	3	
	Large = More than 10 planning professionals	0	
<b>2. Planning Team Qualifications (Maximum 55 points)</b>			
a. Lead Planner qualifications	Experience / ability of Lead Planner to manage educational visioning, facilities planning, and educational adequacy analysis	0 - 20	
b. Planning Staff qualifications	Experience / ability of planning staff to develop planning documents for K-12 School and Career Technical facilities	0 - 20	
c. A4LE* Training / Professional Accreditation (demonstrated either by the primary planning firm or relevant consultant)	A4LE* Credentials (Maximum 10 points)	REFP	5
		CEFP	10
d. Team Organization (showed formal relationships between OFCC, School District Board, consultant, and sub-consultants if any)	Clarity of responsibility / communication demonstrated by table of organization	0 - 5	
<b>3. Planning Team Experience (Maximum 30 points)</b>			
a. Knowledge of <i>Ohio School Design Manual</i> design concepts and planning principles	Depth of knowledge	0 - 10	
b. Past Performance	Level of performance as indicated by past evaluations / letters of reference	0 - 10	
c. Experience with Educational Planning process	Level of experience	0 - 10	
* A4LE Credentials: Association for Learning Environments REFP = Recognized Educational Facility Planner / CEFP = Certified Educational Facility Planner ALEP = Accredited Learning Environment Planner		<b>Subtotal</b>	

**Notes:**

**Evaluator:**

Name \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_