

# Request for Qualifications (Project Auditing Services)

## State of Ohio Standard Forms and Documents

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**Administration of Project:** Ohio Facilities Construction Commission

Project Name	<u>Project Auditing Services</u>	Response Deadline	<u>May 6, 2016</u>	<u>4:00 p.m. local time</u>
Project Location	<u>Various</u>	Project Number	<u>SFC-150888</u>	
City / County	<u>Various / Various</u>	Project Manager	<u>Various</u>	
Owner	<u>Various</u>	Contracting Authority	<u>Ohio Facilities Construction Commission</u>	
No. of paper copies requested (stapled, not bound)	<u>0</u>	No. of electronic copies requested via email (PDF)	<u>1</u>	

Submit the requested number of Statements of Qualifications (Form F110-330) directly to Jill Hoobler at [Jill.Hoobler@ofcc.ohio.gov](mailto:Jill.Hoobler@ofcc.ohio.gov). See Section G of this RFQ for additional submittal instructions.

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 invites interested parties to submit a statement of qualifications to provide auditing services for capital improvement projects. The Commission's emphasis is toward firms that are familiar with accounting and recording practices of school districts, rather than toward firms with construction auditing expertise.

All firms submitting a statement of qualifications will be eligible for a contract beginning July 1, 2016 and ending June 30, 2018. Fees are based on hourly rates, approved by the Commission. The Commission 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 period.

#### B. Scope of Services

The scope of services will include, without limitation, project auditing services related to K-12 and Career Technical facilities funded by the Ohio School Facilities Commission.

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 Commission, the cost breakdown of the Agreement detailed cost components to address the project requirements. The Commission will select firms to provide the following separate services:

1. Delivery of Agreed-Upon-Procedures Reports for school districts participating in Commission programs;
2. Provide Financial Reconciliation Services for Project Closeout; or
3. General Consulting to advise the Commission on auditing procedures, issues, and training.

The Commission will evaluate and select firms separately for the three types of services. The Commission reserves the right to select and enter into a contract with one or more firms.

#### C. Funding / Estimated Budget

Total Project Cost	<u>Hourly rates approved by OFCC</u>	State Funding	<u>N/A</u>
Construction Cost	<u>N/A</u>	Other Funding	<u>N/A</u>
Estimated Design Fee	<u>N/A</u>		

#### D. Anticipated Schedule

Response Deadline: May 6, 2016  
Shortlist: May 18, 2016  
Interviews week of May 23, 2016

Eligibility will be effective for the period covering July 1, 2016 – June 30, 2018

## Request For Qualifications continued

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### E. EDGE Participation Goal

Percent of initial TOTAL Fee: 0%

### F. Evaluation Criteria for Selection

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 services;
2. ability in terms of workload and availability of qualified personnel, equipment, and facilities to perform the required services competently and expeditiously;
3. experience of the proposed personnel in performing school district auditing services;
4. experience of the proposed personnel in providing audits for state or federal programs;
5. past performance as reflected in evaluations of previous clients with respect to factors such as quality of work and meeting deadlines;
6. other similar factors.

Qualifications and experience of individual firm's staff. Proposer's apparent resources and capacity to meet the needs of a typical project. The selected firm must have the capability to use the Internet within their normal business location(s) during normal business hours.

### G. Submittal Instructions

Firms are required to submit a current F110-330 Statement of Qualifications (blank forms are available as a free download from the OFCC website at <http://ofcc.ohio.gov/Documents.aspx>).

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

Electronic submittals must be combined into one PDF file named with the project number listed on the RFQ and the 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.

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).
- Firms performing current Consultant Contracts should identify those Contracts on Page 1 of Section F (Example Projects Which Best Illustrate Proposed Firm's Qualifications for this Contract).
- Do not submit Page 2 of Section F (Relevant Projects Experience Matrix).
- Do not submit Page 3 of Section H (Commitment to Participate in the EDGE Business Assistance Program).

### H. Additional Information

Following this submission, the Commission will evaluate the proposals submitted and identify a list of firms for interviews. These interviews are designed to familiarize Commission staff with the qualifications of firms by further exploring their proposals and the scope and nature of the consulting services they provide.

# Consultant Selection Rating (Project Auditing Services)

## State of Ohio Standard Forms and Documents

Project Name Project Auditing Services Proposer Firm \_\_\_\_\_  
 Project Number SFC-150888 City, State, Zip \_\_\_\_\_

Selection Criteria		Value	Score
<b>1. Team Location, EDGE status and Workload (Maximum 10 points)</b>			
a. Location of firm and EDGE status	Out of State	0	
	Ohio Firm	5	
	EDGE Certified	10	
<b>2. Qualifications (Maximum 80 points)</b>			
a. Experience and Training of Audit Manager		0 - 10	
b. Experience and Training of Key Personnel		0 - 10	
c. School District Auditing Experience		0 - 30	
d. Experience Auditing for State or Federal Programs		0 - 10	
e. Understanding of OFCC and OSFC Policies and Procedures		0 - 10	
f. Availability of Staff		0 - 10	
<b>3. Team Experience (Maximum 10 points)</b>			
a. Past performance - Evaluations / Letters of Reference		0 - 10	
		<b>Subtotal</b>	

Notes:

Evaluator:

Name \_\_\_\_\_

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