

Request for Qualifications (Planning Services)

State of Ohio Standard Forms and Documents

Administration of Project: Local Higher Education

Project Name	<u>UC Libraries Master Plan Study</u>	Response Deadline	<u>10/27/2016</u>	<u>2:00 PM</u>	local time
Project Location	<u>University of Cincinnati, Uptown Campus</u>	Project Number	<u>UCN-16164A</u>		
City / County	<u>Cincinnati / Hamilton</u>	Project Manager	<u>Beth McGrew</u>		
Owner	<u>University of Cincinnati</u>	Contracting Authority	<u>Local Higher Education</u>		
No. of paper copies requested (stapled, not bound)	<u>Six</u>	No. of electronic copies requested (PDF)	<u>One</u>		

Submit the requested number of Statements of Qualifications (Form F110-330) directly to Beth McGrew at Planning + Design + Construction, University Hall, 51 Goodman Drive, Suite 600, Cincinnati, Ohio 45221. See Section H of this RFQ for additional submittal instructions.

Submit all questions regarding this RFQ in writing to Mary Beth McGrew at mcgrewm@uc.edu 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

The University of Cincinnati will engage a consultant to develop a Report that will outline the physical implementation of the University of Cincinnati Libraries' (UC Libraries) strategic plan. The need for the Report is driven by University aspirations to transform UC Libraries in support of University and State of Ohio goals, and to respond to the changing needs of students and faculty and the methods by which they interact with library resources. The Report will refine the vision set by UC Libraries in their strategic plan, and will be used to set a path for services and for the prioritization of known and potentially yet-to-be-identified facility improvements for the UC Libraries for the next ten to twenty years. The Report will be used by the University to inform physical planning and capital improvement recommendations that advance the Libraries' mission in service to the comprehensive education and research goals of the University; and at the University's discretion may be used in a UC Libraries Master Plan document that it may elect to separately-assemble.

UC Libraries is a centrally-administered system of holdings and services that include a main library (Walter C. Langsam Library) and several separately-housed on-campus libraries that serve specific academic programs:

Name	Principle Program(s) Served	Collection Location (Building)	Library ASF *
Walter C. Langsam Library	All / University-Wide	Langsam	284,517
Archives & Rare Books Library	All / University-Wide	Blegen	22,567
Ralph E. Oesper Chemistry-Biology Library	College of Arts & Sciences	Rieveschl	8,433
John Miller Burnam Classical Library	College of Arts & Sciences	Blegen	21,840
Geology-Mathematics-Physics Library	College of Arts & Sciences	Braunstein	18,851
Albino Gorno Memorial Music Library	College-Conservatory of Music	Blegen	9,946
College of Engineering & Applied Science (CEAS) Library	CEAS	Baldwin	12,522
Robert A. Deshon & Karl J. Schlachter Library	College of Design, Architecture, Art, & Planning	DAAP	12,042
College of Education, Criminal Justice and Human Services (CECH) Library	CECH	Teachers College	12,716
Donald C. Harrison Health Sciences Library, & the Henry Winkler Center for the History of the Health Professions	College of Medicine	Medical Sciences Building	44,053
Total SF			447,487

* Assignable square feet for the 2011-2012 academic year is shown.

Three other libraries at the University of Cincinnati are separately-administered by the colleges of Law, UC Blue Ash, and UC Clermont. These three collaborate with UC Libraries on collections and services, trends and policy. A founding member of the Association of Research Libraries in 1932, and maintaining a number of regional and state-wide library partnerships, the University of Cincinnati Libraries today maintains over 4.4 million volumes, 1.4 million e-books, and is central to the success of the widely-diverse array of teaching, research, and community engagement needs of most of the

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University's 45,000 students, its faculty and staff, and the greater Cincinnati area. UC Libraries also utilizes the Southwest Ohio Regional Depository (SWORD) site off-campus for storage and retrieval of collection holdings. Libraries in higher education and research institutions face a rapidly-changing technological and service landscape, and an ever-evolving role of what it means to be a library. Every campus and institution is uniquely-positioned to respond to these issues; and the UC Libraries master plan will explore and identify concepts that respond to the specific needs and expectations that the University has of UC Libraries that, at-present, are articulated in initiatives embedded in its Strategic Plan:

1. Transform and generate new modes of inquiry, access, scholarship, and learning.
2. Transform the evolving role of the information professional.
3. Transform the concept and use of learning spaces managed by the library.
4. Transform library research collections and enable new modes of scholarship.

B. Scope of Services

To be articulated in the Agreement, the Consultant shall provide the following services. While the University might consider modifications to or alternative approaches, as a minimum the Consultants shall provide the following.

1. **Become familiar with and incorporate University-provided information about UC Libraries'** current locations, holdings and services, and its mission, vision, and goals and those of the institution. Information includes but is not limited to:
 - a. Existing floor plans and space data; library operational and organizational data such as volume types and counts, gate counts, staffing list, organization charts, service descriptions, etc.; and mission, vision, goals and strategic plan information.
 - b. Enrollment projections for the university and by college.
 - c. Existing UC Libraries' user research or surveys where available.
 - d. List of current committed and planned capital improvement and renovation projects.
 - e. List of aspirant and competitive peer libraries and higher education institutions.
 - f. General walk-through with a representative of UC Libraries and the Office of Planning+Design+Construction of UC Libraries' 10 Uptown locations.
 - g. A walk-through of the three partner library locations at Law, UC Blue Ash, and UC Clermont will be conducted by the Dean of UC Libraries in coordination with the respective deans of each college.
2. **Become familiar with and incorporate information provided by UC that will be performed by others** including but not limited to facility condition assessments and building code analyses.
3. **Conduct Operational Interviews** with designated staff having assigned operational responsibility for each of UC Libraries' 10 Uptown locations and 3 partner locations, and to become more familiar with current practices and with Library needs from a staff perspective.
4. **Conduct Benchmark Research** of peer libraries, with findings that include volumes-to-space, services offered, operating structure, and other metrics that the Consultant might recommend.
5. **Report of Trends** in higher education research libraries.
6. **Conduct Mission / Visioning / Goals sessions**, including interviews with representatives of:
 - a. Offices of the Provost and Student Affairs, & the Dean of UC Libraries
 - b. Head librarians of each separate library locations
 - c. Deans of the College of Arts and Sciences, the Graduate School, Engineering, CCM, DAAP, and the College of Medicine, the University Archivist, CECH.
 - d. User groups: faculty, undergraduate, and graduate students.
 - e. Information about the libraries at Law, UC Clermont, & UC Blue Ash will be provided strictly through the dean of UC Libraries.
7. **Conduct User Survey/Research.** Test more broadly the principle observations from the mission and visioning sessions. With the UC Libraries master plan team, review the proposed methodology and develop invitation to participate, and a test survey. Assemble, analyze, and report on the results including participation rate and both demographics & theme-based observations.
8. **Conduct a Facilities Utilization & Space Needs Assessment**, including projections based upon enrollments and UC Libraries' vision and goals, and upon appropriate space standards recommended by the Consultant for each library.

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9. Assemble Preliminary Recommended Library Master Plan Program Goals & Concepts.

10. Attend UC Libraries Master Plan Team Meetings and Present information:

- a. **Meeting #1** - Kick-Off Meeting with UC Libraries Master Plan Team. Includes review of Work Plan approved by the University.
- b. **Meeting #2** - Preliminary Findings & Test of Observations. Present findings, including benchmark comparisons, outline of trends, themes & goals from mission and visioning sessions. Answer questions and participate in discussion. Present and obtain approval of proposed user survey / research method.
- c. **Meeting #3** - Outcomes & Preliminary Program Concept Recommendations. Present findings and recommended concepts to address long-term Libraries program needs.
- d. **Meeting #4** - Present Final Report

DELIVERABLES

Provide written document with supporting information and graphics, including:

1. **Preliminary Findings Report**, in PDF form. A summary Power Point document is preferred for presentation purposes.
2. **Outcomes Report and Preliminary Program Recommendations**, in PDF form. A summary Power Point document is preferred for presentation purposes.
3. **Final Report and Presentation**, in PDF and Word form. Present an Executive Summary and key information details in a Power Point document. Consultant's final report shall include participants, methodology, studies and supporting data, observations, recommendations, and supporting drawings and illustrations. Plan information developed through a Consultants' proprietary means may be submitted in a form to be determined in consultation by the Sr. Associate Vice President for Planning+Design+Construction and the Dean of UC Libraries.

WORK METHODS

All responses to this RFQ must include a proposed preliminary Project Work Plan, including a schedule and a time-line for incorporating university-provided information and the work of others; description of processes, methods, and metrics; suggested list of University roles or participants that the respondent might recommend be included in the study; and deliverables. The University reserves the right to make the final determination of all study participants and deliverables. All Consultant communications for the study will be through the Senior Associate Vice President for Planning+Design+Construction and/or a designee. Respondents planning to utilize analytical tools or data to perform any portion of the work that are or their own proprietary making are asked to please clarify their intent to utilize such in their response to this RFQ.

The selected Consultant, as a portion of its required Scope of Services and prior to submitting its proposals, will discuss and clarify with the Owner and/or Contracting Authority the following, the cost breakdown of the Agreement detailed cost components; and will submit a proposed final work plan including methods and schedule, study participants to address the Owner's project requirements, deliverables, and communications methods to be used in the execution of the work.

OTHER

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>. 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. Library Facility Planning & Programming for Higher Education Research Institutions
2. Instructional and Library Technology
3. Benchmark Research
4. Higher Education Library Trends Research / Expertise
5. Facility Utilization & Space Needs Assessments
6. Mission, Vision, & Goal Identification Facilitation
7. Focus Group & Interview Facilitation
8. Survey-Based Research
9. Review of Ohio Building Code for Public Higher Education Library Facilities

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C. Funding / Estimated Budget

Total Project Cost	<u>\$150,000</u>	State Funding	<u>\$0</u>
		Other Funding	<u>\$150,000</u>

D. Services Required (see note below)

Primary	<u>Library Facilities Planning</u>
Secondary	<u>Architecture / Space Planning</u>
	<u>Library Technology</u>
	<u>Audio / Visual & Information Technology</u>
	<u>Public Higher Ed Library Code Consulting</u>
Others	<u>N/A</u>

E. Anticipated Schedule

Planning Services Start	<u>09 / 15 / 2016</u>
Planning Services Completed	<u>09 / 15 / 2017</u>

F. EDGE Participation Goal

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

- Demonstrated ability to meet Owner's 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.
- Proximity of prospective firms to the project site.
- Proposer's apparent resources and capacity to meet the needs of this project.
- The selected firm and all its consultants must have the capability to use the Internet within their normal business location(s) during normal business hours.

H. Submittal Instructions

Consultants shall NOT, under any circumstance, contact UC Libraries or their partner libraries. All inquiries are to be directed strictly to the Project Contact.

Short-listed firms will have an opportunity to walk through the library facilities prior to interviewing.

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 or similar software for creating a PDF rather than using a scanner. If possible, please reduce the file size of the PDF. In Acrobat, go to Advanced, then PDF Optimizer. Also, please label the CD or DVD and sleeve with the project number and firm name if applicable.

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.

Facsimile copies of the Statement of Qualifications will not be accepted.

Firms are requested to identify professional registrations, memberships, 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.

Planning Services Selection Rating Form

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Project Name UC Libraries Master Plan Study Proposer Firm _____
 Project Number Project Number City, State, Zip _____

Selection Criteria		Value	Score
1. Firm Location, Workload and Size (Maximum 15 points)			
a. Proximity of firm to project site	Less than 150 miles	5	
	150 to 300 miles	2	
	More than 300 miles	0	
b. Amount of fees awarded by Contracting Authority	Less than \$1,000,000	5	
	\$1,000,000 to \$2,000,000	2	
	More than \$2,000,000	0	
c. Number of relevant professionals	Less than 3 planning professionals	3	Max = 5
	3 to 6 planning professionals	4	
	More than 6 planning professionals	5	
2. Primary Qualifications (Maximum 30 points)			
a. Master planning lead	Experience / ability of lead master planner to manage visioning / capital improvement plans	0 - 10	
b. Assessment lead	Experience / ability of lead to manage assessors of various disciplines	0 - 5	Max = 20
c. Planning staff	Experience / ability of planning staff to develop long range master plans	0 - 10	
d. Technical staff	Experience / ability of assessors to accurately collect data and evaluate systems and components	0 - 5	
3. Sub-Consultant Qualifications (Maximum 10 points)			
Key discipline leads	Experience / ability of all key discipline leads to effectively perform the services	0 - 10	
4. Project Team Qualifications (Maximum 15 points)			
a. Previous team collaboration	Less than 3 projects (Low)	0	Max = 5
	3 to 6 projects (Average)	2	
	More than 6 projects (High)	5	
b. LEED* Registered / Certified consultant participation	No projects	0	Max = 5
	Registered	2	
	Certified	5	
c. Team Organization	Clarity of responsibility / communication demonstrated by table of organization	0 - 5	
5. Overall Project Team Experience (Maximum 30 points)			
a. Criteria development and prioritization	Performance in establishing owner criteria for capital improvement plans	0 - 10	
b. Experience with similar planning projects	Less than 5 projects (Low)	0 - 3	
	5 to 9 projects (Average)	4 - 6	
	More than 9 projects (High)	7 - 10	
c. Past performance	Level of performance as indicated by past evaluations / letters of reference	0 - 10	
		Subtotal	

* LEED = Leadership in Energy & Environmental Design developed by the U.S. Green Building Council

Notes:

Evaluator:

Name _____

Signature _____ Date _____