

Request for Qualifications (CM at Risk Contract)

State of Ohio Standard Forms and Documents

Administration of Project: School District Board + OFCC

Project Name	Donovan ES Addition/Renovation Berry Intermediate School Addition/Renovation New Middle School	Response Deadline	03/14/2014	4:00 pm	local time
Project Location	Donovan: 401 Justice Avenue Berry: 23 Oakwood Street	Project Number	SFC-140349		
City / County	Lebanon / Warren	Project Manager	Paul J. Motylinski		
Owner	Lebanon City Schools	Contracting Authority	School District Board + OFCC		
Delivery Method	CM at Risk	Prevailing Wages	None		
No. of paper copies requested (stapled, not bound)	0	No. of electronic copies requested on CD (PDF)	2		

Submit the requested number of Statements of Qualifications (Form F110-330) directly to Jill Hoobler at 30 West Spring Street, 4th Floor, Columbus, Ohio 43215. See Section G of this RFQ for additional submittal instructions.

Project Overview

A. Project Description

This project includes the following:

1. Addition and renovations to Donovan Elementary School. The addition will be approximately 21,700 square feet in size. A swing space allowance of \$643,545.00 and a LEED waiver allowance of \$462,264.38 are included in the Master Plan. The total project cost and total construction cost for Donovan Elementary School is \$15,340,672.91 and \$12,907,788.50, respectively.
2. Addition, renovations, and partial demolition of Berry Intermediate School. The addition will be approximately 1,500 square feet in size. The partial demolition consists of the 1935 music/classroom addition (approximate size 1,570 square feet) and the 1963 addition (approximate size 7,730 square feet). A swing space allowance of \$643,545.00 is included in the Master Plan as well as a \$660,743.26 allowance for LEED. The total project cost and total construction cost for Berry Intermediate School is \$20,570,523.24 and \$17,394,896.35, respectively.
3. Construction of a new middle school. The size of the new middle school will be approximately 124,170 square feet. The new middle school is required to achieve LEED Silver Certification at a minimum. The total project cost and total construction cost for the new middle school is \$26,700,970.60 and \$22,522,485.22, respectively.

Professional design services will be provided by SHP Leading Design.

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

The selected CM, 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.

As required by the Agreement, and as properly authorized, provide the following categories of services: develop and maintain estimates of probable construction cost, value engineering, project schedules, and construction schedules; lead and manage the Subcontractor Prequalification and Bidding process, Construction and Closeout Stage.

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 Agreement can be obtained at the OFCC website at <http://ofcc.ohio.gov>.

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 CM 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 A/E and the CM. The Contracting Authority and/or Owner shall have access to all books, records, documents and other data in the CM's

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possession related to itself, its subcontractors and material suppliers pertaining to bidding, pricing, or performance of the Agreement.

Preconstruction Services: The CM will work cooperatively with the Contracting Authority and/or Owner, A/E and Project Team, and will provide, among other services, cost estimating, budgeting, value engineering, constructability review comments on documents produced by the A/E during the Program Verification, Schematic Design, Design Development, and Construction Document stages, scheduling and preconstruction planning throughout the preconstruction stage. The CM shall also review the design documents at each stage submission (POR, SD, DD, CD) for compliance with the requirements as set forth in the *Ohio School Design Manual* and provide comments based on the review to the A/E team through the OFCC Project Manager. 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 CM, together with the A/E's detailed listing of any material incomplete design elements and the A/E's statement of intended scope with respect to such incomplete elements (the "Design Intent Statement"). The CM shall submit to the Contracting Authority and/or Owner and the 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 CM, the Contracting Authority and/or Owner and the 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 A/E and the CM. The CM shall then submit to the Contracting Authority, for approval, the CM's proposed final Contract Sums 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, the parties will enter into an amendment to the Agreement establishing the Contract Sum (GMP Amendment). The final negotiated Contract Sum shall not exceed the Project Budget established for construction. Each phase of construction (early site, building, abatement, or demolition) is to have a GMP Amendment and a final negotiated Contract Sum per building being either constructed, abated, or demolished. If the proposed Contract Sums exceeds such budgets, then the Contracting Authority may terminate the agreement with the CM and seek other firms for completion of the Project.

The milestone dates for completing the design stage submissions for the projects are as follows:

School/Design Stage	POR	Schematic Design	Design Development	Construction Documents
Donovan Elementary School Addition and Renovations	03/28/2014	06/30/2014	10/30/2014	03/31/2015
Berry Intermediate School Addition, Renovations, and Partial Demolition	11/21/2014	02/27/2015	07/31/2015	12/18/2015
New Middle School	02/28/2014	05/30/2014	10/30/2014	03/31/2015

Construction Services: The CM shall construct the Project pursuant to the construction documents and in accordance with the schedule requirements. The CM shall hold all subcontracts and shall be fully responsible for the means and methods of construction, project safety, 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 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 CM'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. Ability to work as a positive team partner with the Contracting Authority, Owner, and A/E firm to arrive at a GMP at or below the project's budget.
2. Possessing the capacity and resources to oversee the construction, renovation, and demolition of multiple facilities simultaneously.
3. Experience with projects that implement the CM at Risk project delivery method.

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4. Experience with managing multiple PK-12 facilities (new construction, renovation, and demolition) during the pre-construction, construction, and close-out phases simultaneously.
5. Experience and capabilities of creating and using Critical Path Method (CPM) schedules and using CPM schedules as a project management resource.
6. Experience with achieving at a minimum LEED Silver certification relative to PK-12 facilities.
7. Experience working on projects for school districts, OFCC, OSFC, or other government agencies.
8. Experience accurately estimating construction costs throughout all stages of design.
9. Experience with OAKS CI reporting system.

No incentives will be considered for this project (e.g.: sharing in savings, etc.).

C. Funding / Estimated Budget

Total Project Cost	\$62,612,166.75
Construction Cost	\$52,825,170.07
State Funding	\$23,166,501.70
Local Funding	\$39,445,665.05

D. Anticipated Schedule

CM Services Start (mm/yy)	05/2014	
School	Construction Stage Start (mm/yy)	Construction Stage Completed (mm/yy)
Donovan Elementary	05/2015	11/2016
Berry Intermediate	06/2016	08/2017
New Middle School	04/2015	07/2016
CM Services Completed (mm/yy)	07/2018	

E. EDGE Participation Goal

Percent of Total Construction Contracts Awarded 5.0% Percent of *initial* TOTAL CM Fee 5.0%

F. Evaluation Criteria for Selection

Selection Criteria:

The CM 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 stage for the final CM selection. The qualifications-based selection criteria for the RFQ are included in this announcement. The best value criteria used in evaluating proposals from the short listed firms will include such factors that are determined to derive or offer the greatest value to the State and the Owner, combining both qualifications and fee.

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 Request for Proposal (RFP) that will invite the firms to submit pricing proposals containing their proposed preconstruction stage compensation fee, construction stage personnel costs, construction stage itemized general conditions cost percentage, construction stage contingency percentage and construction stage 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:

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Prior to submitting a response to the RFP, the short-listed firms will be invited to meet individually with the Contracting Authority and/or Owner. The purpose of the pre-proposal meetings is to permit the short-listed firms to ask the Contracting Authority and/or Owner questions in an individual setting to assist the firms prepare their responses to the RFP. The pre-proposal meetings will be conducted at the Lebanon City School District Board of Education Office located at 700 Holbrook Avenue, Lebanon, Ohio 45036. 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 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 interviews will be conducted at the Lebanon City School District Board of Education Office located at 700 Holbrook Avenue, Lebanon, Ohio 45036. The Contracting Authority will notify each short-listed firm to schedule individual times for the interviews.

Selection Schedule:

Tentative schedule is subject to change.

RFQ advertised	02/09/2014
Qualifications due	03/10/2014
RFP issued to the short-listed firms	03/28/2014
Interviews	04/21/2014
Selection of CM	04/28/2014

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 CM 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 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 CM's 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.

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

Submit all questions regarding this RFQ in writing to Jill Hoobler at 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 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.

Unless otherwise noted or exempt, all documents submitted to the Contracting Authority in response to this RFQ or RFP are public and will be available for inspection at the conclusion of the selection process. The following information shall remain confidential and will not be released: (1) Proposal Form(s), except for cost category subtotals which will be transferred to the Best Value Rating Form; (2) Financial Capacity; and (3) Bonding/Insurance.

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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.
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)

LEED AP ND (Neighborhood Development specialty)
LEED AP Homes (Specialty for residential LEED construction)

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)

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

CM at Risk Selection Rating Form

State of Ohio Standard Forms and Documents

Project Name Donovan ES Addition/Renovation
Berry Intermediate School Addition/Renovation
New Middle School Proposer Firm _____
 Project Number SFC-140349 City, State, Zip _____

Selection Criteria		Value	Score
1. Primary Firm Location and Workload (Maximum 10 points)			
a. Proximity of firm to project site	Less than 25 miles	5	
	25 miles to 50 miles	2	
	More than 50 miles	0	
b. Amount of contracts awarded by Contracting Authority in previous 24 months	Less than \$5,000,000	5	
	\$5,000,000 to \$10,000,000	2	
	More than \$10,000,000	0	
2. Primary Qualifications (Maximum 40 points)			
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10	Max = 30
b. Project administration lead	Experience / ability to effectively administer project controls and processes	0 - 5	
c. Technical staff	Experience / ability of technical staff to develop accurate estimates and schedules	0 - 10	
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - 15	
3. Key Consultant Qualifications (Maximum 10 points)			
a. Key consultants	Experience / ability of key consultants to perform effectively and collaboratively	1 - 5	
b. Proposed EDGE-certified Consultant participation*	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 team collaboration	Less than 3 sample projects	1	Max = 3
	3 to 6 sample projects	2	
	More than 6 sample projects	3	
b. LEED** Registered / Certified project experience	Registered projects	1	Max = 2
	Certified projects	2	
c. BIM project experience	Training and knowledge	1	Max = 3
	Direct project experience	3	
d. Team organization	Clarity of responsibility / communication demonstrated by table of organization	0 - 2	
5. Overall Team Experience (Maximum 30 points)			
a. Previous team performance	Past performance as indicated by evaluations and letters of reference	0 - 10	
b. Experience with similar projects / delivery methods	Less than 3 projects	0 - 3	
	3 to 8 projects	4 - 6	
	More than 8 projects	7 - 10	
c. Budget and schedule management	Performance in completing projects within original construction budget and schedule	0 - 5	
d. Knowledge of Ohio Capital Improvements process	Less than 3 projects	0 - 1	
	3 to 6 projects	2 - 3	
	More than 6 projects	4 - 5	
* Must be comprised of consulting firm(s) and NOT the primary firm ** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute		Subtotal	

Notes:

Evaluator:

Name _____

Signature _____

Date _____