

Request for Qualifications (CM at Risk Contract)

State of Ohio Standard Forms and Documents

Administration of Project: Ohio Facilities Construction Commission

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|--|---|--|------------------------------|---------|------------|
| Project Name | Two new PK-6 Elementary Schools and Demo of Boyd E. Smith and Charles L. Seipelt ES Buildings | Response Deadline | 10/30/2013 | 4:00 pm | local time |
| Project Location | 1052 Jer-Les Drive & 5684 Cromley Drive | Project Number | SFC-140343 | | |
| City / County | Milford / Clermont | Project Manager | Paul J. Motylinski | | |
| Owner | Milford Exempted Village School District | Contracting Authority | School District Board + OFCC | | |
| 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. Construction of two new PK-6 elementary school buildings. Each building will be approximately 53,000 square feet in size. One of the new PK-6 elementary school buildings will be located on the existing property where the Boyd E. Smith Elementary School currently exists. The other PK-6 elementary school building will be located either where the existing Charles L. Seipelt Elementary School currently exists, or on another property as determined by Milford Exempted Village School District (EVSD). Both of the new PK-6 elementary school buildings will be constructed concurrently.
2. Abatement and demolition of the existing Boyd E. Smith Elementary School and Charles L. Seipelt Elementary School after the Owner obtains the Final Certificate of Occupancy and moves into the new PK-6 elementary school buildings. The approximate size of Boyd E. Smith Elementary School and Charles L. Seipelt Elementary School in square feet is 50,840 and 44,556, respectively. Both of these facilities will be demolished concurrently.

Professional design services are being acquired by the Contracting Authority under a separate RFQ.

The Program of Requirements (POR) will be developed as a part of this project by the Architect/Engineer (A/E).

This project will utilize the Construction Manager at Risk (CMR) project delivery method.

Prevailing Wage requirements do not 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

The selected Construction Manager at Risk (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: provide constructability review comments on documents produced by the A/E during the Program Verification, 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 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

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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 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, scheduling and preconstruction planning throughout the preconstruction stages. 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 Sums (GMP Amendment), the parties will enter into an amendment to the Agreement establishing the Contract Sums (GMP Amendment). The final negotiated Contract Sums shall not exceed the Project Budget established for construction. Each phase of construction (early site, building, or demolition) is to have a GMP Amendment and a final negotiated Contract Sum per building being either constructed or demolished. If the proposed Contract Sums exceeds such budgets, then the Contracting Authority may terminate the agreement with the CM and seek from other firms, bids for completion of the Project.

The milestone dates for completing the design stage submissions for both of the new PK-12 elementary schools are summarized in Table 1 below.

Table 1: New Construction Design Stage Submission Milestone Dates

| <u>Stage</u> | <u>Milestone Date</u> |
|--|-----------------------|
| Program Verification (new construction and demolition) | 02/21/2014 |
| Early Site and Building Schematic Design | 04/04/2014 |
| Early Site Design Development | 05/02/2014 |
| Building Design Development | 07/25/2014 |
| Early Site Construction Documents | 08/01/2014 |
| Building Construction Documents | 12/19/2014 |

The timeframe for the Contracting Authority accepting the Construction Manager's Guaranteed Maximum Price (GMP) Amendments for the early site and new PK-12 elementary school buildings is July 2014 and September 2014, respectively.

The milestone dates for submitting the stage submissions for demolition of Boyd E. Smith and Charles L. Seipelt Elementary Schools are summarized in Table 2 below.

Table 2: Demolition Design Stage Submission Milestone Dates

| <u>Stage</u> | <u>Milestone Date</u> |
|------------------------|-----------------------|
| Schematic Design | 01/30/2015 |
| Design Development | 03/13/2015 |
| Construction Documents | 07/17/2015 |

The timeframe for the Contracting Authority accepting the Construction Manager's GMP Amendment for the demolition of Boyd E. Smith and Charles L. Seipelt Elementary Schools is May 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 prevailing wage requirements, 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.

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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 or demolition of multiple facilities simultaneously.
3. Experience with projects that implement the Construction Manager at Risk project delivery method
4. Experience with managing multiple PK-12 facilities (new construction 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 | \$12,096,438.43 (New PK-6 ES #5) \$12,096,438.43 (New PK-6 ES #6) \$414,010.28 (Demo Boyd E. Smith ES) \$374,401.87 (Demo Charles L. Seipelt ES) |
| Construction Cost | \$10,418,941.05 (New PK-6 ES #5) \$10,418,941.05 (New PK-6 ES #6) \$356,015.38 (Demo Boyd E. Smith ES) \$321,955.35 (Demo Charles L. Seipelt ES) |
| State Funding | \$24,981,289.01 |
| Other Funding | \$0.00 |

D. Anticipated Schedule

| | |
|---|-----------|
| CM Services Start (mm/yy) | 12 / 2013 |
| Early Site DD GMP Approval (mm/yy) | 07 / 2014 |
| Building DD GMP Approval (mm/yy) | 09 / 2014 |
| Early Site Construction Stage Start (mm/yy) | 09 / 2014 |
| Early Site Construction Stage Completed (mm/yy) | 11 / 2014 |
| Building Construction Stage Start (mm/yy) | 04 / 2015 |
| Demolition DD GMP Approval (mm/yy) | 05 / 2015 |
| Building Construction Stage Completed (mm/yy) | 04 / 2016 |
| Demolition Stage Start (mm/yy) | 05 / 2016 |
| Demolition Stage Completed (mm/yy) | 08 / 2016 |
| CM Services Completed (mm/yy) | 03 / 2017 |

E. EDGE Participation Goal

| | | | |
|---|------|--|------|
| Percent of Total Construction Contracts Awarded | 5.0% | Percent of <i>initial</i> 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

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containing the contract terms and conditions, (ii) a set of the most recent design documents and (iii) a proposed Project schedule.

Pre-Proposal Meeting:

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 meeting is to permit the short-listed firms to ask the Contracting Authority and/or Owner questions in an individual setting to help the firms prepare their responses to the RFP. The pre-proposal meeting will be conducted at the Milford EVSD Board of Education Office located at 777 Garfield Avenue, Milford, Ohio 45150. 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 Milford EVSD Board of Education Office located at 777 Garfield Avenue, Milford, Ohio 45150. 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 Posted and Advertised | 09/27/2013 |
| Qualifications Due | 10/30/2013 |
| RFP issued to the Short-Listed Firms | 11/19/2013 |
| Site Visit | 11/25/2013 |
| Pre-proposal Meetings | 11/25/2013 |
| Proposals Due | 12/02/2013 |
| Interviews | 12/09/2013 |
| Selection of CM | 12/16/2013 |

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.

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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 OFCC website at ofcc.ohio.gov/opportunities 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.

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

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Project Name Two new PK-6 Elementary Schools and Demo of Boyd E. Smith and Charles L. Seipelt ES Buildings Proposer Firm _____
 Project Number To Be Assigned 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 - 15 | |
| d. Construction administration staff | Experience / ability of field representative to identify and solve issues during construction | 0 - 10 | |
| 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 6 projects | 0 - 1 | |
| | 6 to 8 projects | 2 - 3 | |
| | More than 8 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 _____