Request for Qualifications (CM at Risk Contract)
State of Ohio Standard Forms and Documents

Administration of Project: School District Board + OFCC

Project Name	West Liberty-Salem Local School District	Response Deadline	11/27/13	4:00 pm	local time
Project Location	7208 US Highway 68 North	Project Number	SFC-140362		
City / County	West Liberty / Champaign	Project Manager	Rhonda Hagemeyer		
Owner	West Liberty-Salem Local School District	Contracting Authority	School District Board + OFCC		
Delivery Method	CM at Risk	Prevailing Wages	None		
No. of paper copies requested (stapled, not bound)	1	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 40 West Spring Street, 4th Floor, Columbus, Ohio 43215. 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 with the project number included in the subject line (no phone calls please). Questions will be answered and posted to 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 Program of Requirements (POR) will be developed as a part of this project by the Architect/Engineer (A/E).

Professional design services will be provided by OHM Advisors and are being acquired by the Contracting Authority under a separate contract.

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.

The Project is a co-funded Classroom Facilities Assistance Program project. The co-funded Project includes:

Phased renovation of the fully occupied existing 159,313 square foot K-12 building.

Construction of a co-funded 21,980 square foot addition.

Site work associated with the renovation and addition scope. The Construction budget includes an additional Site Access Safety allowance of $482,198.

Procurement of loose furnishings and technology.

Environmental Hazard Abatement.

A swing space budget of $747,056 is included in the published construction budget. The District may elect to retain some of this budget outside of the Contract to pay the rental cost of yet to be determined modular classrooms.

The project will be pursuing LEED silver or gold certification.

The project will include locally funded initiatives which may include, but is not limited to, reprogramming of existing space, entrance reconfiguration and site improvements.

A criminal background check as described in Ohio Revised Code Section 3319.39 will be required for any on-site employee, including those of its subcontractors and sub-subcontractors. Each employee will have or wear an identification sticker or badge to show compliance with this requirement at all times when on site.

Shared savings for this project will be Owner: 100% Construction Manager at Risk : 0%

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 and design manual compliance review comments on documents produced by the A/E during the 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. Assist in the phasing and development of swing space. Assist in financial forecasting and accounting including drawdown projections and locally funded initiative estimating.

Refer to the *OFCC Manual* and/or the *Ohio School Design Manual* for additional information about the type and extent of services required for each. A copy of the standard Agreement, including referenced exhibits, 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 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, financial forecasting and accounting, value engineering, constructability review, design manual compliance 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 Sum 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). Based on schedule needs more than one GMP amendment may be required. The final negotiated Contract Sum shall not exceed the Project Budget established for construction. If the proposed Contract Sum exceeds such budget, then the Contracting Authority may terminate the agreement with the CM and seek from other firms, bids for completion of the Project.

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 (not applicable for this project), 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 supplemental terms to the subcontract form.

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. OSFC and OFCC Procedures
2. K-12 Construction Projects
3. Experience Managing Swing Space and construction projects while buildings are occupied with students and staff, providing safety and security for occupants and general public.

4. Construction Manager at Risk Project Delivery
5. Experience with renovation and additions to existing K-12 facilities
6. LEED Documentation

C. Funding / Estimated Budget

Total Project Cost	$30,184,981
Construction Cost	$24,391,207
State Funding	$19,522,454
Other Funding	$10,662,527

D. Anticipated Schedule

CM Services Start (mm/yy)	02 / 14
GMP Approval (mm/yy)	10 / 14
Construction Stage Start (mm/yy)	03 / 15
Construction Stage Completed (mm/yy)	03 / 17
CM Services Completed (mm/yy)	07 / 17

E. EDGE Participation Goal

Percent of Total Construction Contracts Awarded	5%	Percent of *initial* TOTAL CM Fee	5%

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 is 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:
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 held at the District. 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 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	10/28/13

Qualifications Due	11/27/13
RFP issued to the Short-Listed Firms	12/23/13
Site Visit at West Liberty-Salem project site	1/2/14
Pre-proposal Meetings at West Liberty-Salem	1/2/14
Proposals Due	1/13/14
Interviews at West Liberty-Salem	1/23/14
Selection of CM	1/31/14

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 address how they will implement Building Information Modeling ("BIM") on the project, experience and level of training of staff related to BIM, incorporation of team partners that have previous BIM experience, and an understanding of collaborative BIM processes, including but not limited to the *State of Ohio BIM Protocol* available at the OFCC website at http://ofcc.ohio.gov.

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.

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)

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

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 West Liberty-Salem Local School District Proposer Firm _____

Project Number Project Number 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 100 miles	5		
	100 miles to 150 miles	2		
	More than 150 miles	0		
b. Amount of contracts awarded by Contracting Authority in previous 24 months	Less than $20,000,000	5		
	$20,000,000 to $50,000,000	2		
	More than $50,000,000	0		
2. Primary Qualifications (Maximum 40 points)				
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10		
b. Project administration lead	Experience / ability to effectively administer project controls and processes	0 - 5	Max = 30	
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 4 sample projects	1	Max = 3	
	4 to 8 sample projects	2		
	More than 8 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 6 projects	4 - 6		
	More than 6 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 _____