

Request for Qualifications (Owner Agent)

State of Ohio Standard Forms and Documents

Administration of Project: Local Agency

Project Name	<u>Owner Agent Services FY 19-20</u>	Response Deadline	<u>Aug 31, 2018</u>	<u>4:00PM</u>	local time
Project Location	<u>Various</u>	Project Number	<u>DNR-190009</u>		
City / County	<u>Various / Various</u>	Project Manager	<u>Samantha Cothorn</u>		
Owner	<u>Ohio Department of Natural Resources</u>	Contracting Authority	<u>Local Agency</u>		
Delivery Method	<u>Various</u>	Prevailing Wages	<u>None</u>		
No. of paper copies requested (stapled, not bound)	<u>2</u>	No. of electronic copies requested (PDF)	<u>2</u>		

Submit the requested number of Statements of Qualifications (Form F110-330) directly to Julie Endicott at 2045 Morse Rd., Building E-3, Columbus, Ohio 43229. See Section G of this RFQ for additional submittal instructions.

Submit all questions regarding this RFQ in writing to Julie Endicott at julie.endicott@dnr.state.oh.us 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 Ohio Department of Natural Resources (ODNR) intends to select a firm to provide Owner Agent services as it continues a multi-year Capital Improvement Program. Owner Agent Services, in relation to ODNR's needs, are intended to provide support and assistance to the Division of Engineering (DOE) as it conducts assessments, master planning, strategic planning, design, bidding/procurement, construction administration, and close-out on construction projects undertaken by the various ODNR Divisions, i.e. Parks & Watercraft, Wildlife, Forestry.

ODNR's Capital Improvement Program covers the spectrum from engineering-based projects such as utility infrastructure upgrades, water and wastewater treatment plant rehabilitations, parking/roadway upgrades and replacements, dam and canal rehabilitations, and shoreline protection embankments to architectural-based projects such as administrative office, lodge, cabin, campground, restroom, and storage structure construction and renovations. Projects are located at various sites around the state including state parks, state nature preserves, state forests, state wildlife areas, and associated support/operating facilities for ODNR programs and regulatory agencies. Projects use a variety of construction delivery methods, including General Contracting (GC), Construction Manager-at-Risk (CMR), and/or Design-Build (DB).

Program level services provided by the Owner Agent include compiling, tracking, and reporting information regarding individual projects and then assimilating that information into a program-wide tracking and reporting system, preferably utilizing a web-based platform compatible with State of Ohio IT requirements and security protocols. DOE utilizes readily-available basic software programs such as Microsoft Excel and Access to gather and track information and any system-wide platform the Owner Agent proposes to use must interface with those programs. All data compiled and tracked shall remain the property of the state during and at the conclusion of the Owner Agent contract period and shall be downloaded and easily convertible for use with similar database systems.

Planning and Design level services include conducting/reviewing facility condition assessments, providing/reviewing estimates of construction costs, constructability reviews of design documents, project schedule reviews, assisting DOE project managers with design-related paperwork and project monitoring through meeting attendance and site visits.

Bidding/Procurement and Construction level services include assisting in bid packaging, bidder reviews, contract compliance (preferably via a web-based software platform that captures certified payroll), attendance at progress meetings, field reports, contractor pay app review, coordinating materials between the owner, the contractor, and the design team, assisting with final paperwork to close out projects, and any additional administrative support as needed.

All firms submitting a statement of qualifications will be eligible for award of contract for the period beginning on or around September 1, 2018 and ending June 30, 2020 with possible two-year renewal eligibility.

The Owner Agent consultant cannot be an affiliate or sub-consultant of any GC, CMR or DB for the ODNR projects during the term of the owner agent agreement.

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While, ODNR anticipates centralized services from the selected Owner Agent at the ODNR Fountain Square complex at 2045 Morse Rd. Columbus, OH 43229, travel within the state will likely be necessary to complete the services. For the purposes of scoring proximity to project site, the ODNR Fountain Square complex will be considered the project site.

B. Scope of Services

Primary assignment will be to provide overall Capital Improvements Program management including involvement in strategic planning and in identifying construction best practices and processes. Additional work assignments may include: program budget management/cost accounting for approximately \$150 million in capital funding per biennium across multiple account lines for major projects and multiple small projects; financial, contract compliance, and other data collection and reporting; review criteria and/or design documents for compliance and constructability; review AE, CMR or DB pre-construction cost estimates for accuracy; prepare independent cost estimates of discrete portions of work to validate the AE, CMR or DB estimates; assist in reconciling cost estimates with the project budget and negotiation of a guaranteed maximum price; attend progress meetings for project as needed; review contractor's monthly pay applications during construction phase for owner's approval; assist in reviewing and resolving construction claims involving the owner or modifications to the negotiated guaranteed maximum price; supplement AE and commissioning agent's construction observation activities for QA/QC; assist in punch-list review for owner occupancy; any other related assigned duties.

The selected Owner Agent ("OA"), as a portion of its required Scope of Services and prior to submitting its implementation plan and proposal, will discuss and clarify with the Owner and the Contracting Authority the breakdown of the Owner Agent Agreement detailed cost components to address the Owner's project requirements and refine the project schedule. Participate in the Encouraging Growth, Diversity & Equity ("EDGE") Program as required by statute and the Agreement.

As required by the Agreement, and as properly authorized, provide the following categories of services: provide constructability review comments on documents produced by the Architect/Engineer during the Pre-design, Schematic Design, Design Development, and Construction Document stages; develop and maintain estimates of probably construction cost, value engineering, project schedules, and construction schedules; provide support during the Bid and Award Stage, Construction Stage and Post-Construction Stage.

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>.

During the construction period, provide on-site construction management services each week as designated in the Owner Agent implementation plan, including (1) attendance at progress meetings, (2) written daily reports, (3) on-site representation comprised of the CM and its consultant staff involved in the project, all having relevant and appropriate types of construction management experience.

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. Capital Improvements Program management
2. Owner Agent Services
3. Construction Management
4. Public Sector
5. Project Cost Accounting and Financial Reporting
6. Data Collection/Management/Analysis and Reporting
7. Project Cost Estimating
8. CPM Scheduling
9. Construction Claims Risk Assessment and Support
10. Knowledge of State of Ohio Construction delivery methods and associated contracts

C. Funding / Estimated Budget

Total Project Cost	<u>Varies with each project</u>	State Funding	<u>\$148,667,686</u>
Construction Cost	<u>Varies with each project</u>	Other Funding	<u>\$0</u>
Estimated CM Fee	<u>1.0% to 2.0%</u>		

NOTE: The CM fee percentage for this project includes all professional CM services, and consultant services necessary for proper completion of the Basic Services for the successful completion of the project, including but not limited to: review and verification of the Program of Requirements provided by the Owner or A/E, validation of existing site conditions (but not subsurface or hidden conditions), preparation of cost estimates and schedules for the project. Fees may be negotiated and allocated for Additional Services (e.g., extensive evaluation or validation of site conditions, extensive pre-design investigations, etc.)

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D. Anticipated Schedule

Services Start	<u>11 / 18</u>
Construction Notice to Proceed	<u>11 / 18</u>
Substantial Completion of all Work	<u>06 / 21</u>
Services Completed	<u>09 / 21</u>

E. EDGE Participation Goal

Percent of *initial* TOTAL Fee 5.0%

F. Evaluation Criteria for Selection

- Demonstrated ability to meet Owner's programmed project vision, scope, 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.
- Experience and capabilities of creating or using Critical Path Method (CPM) schedules and of using CPM schedules as a project management tool.
- Experience and capabilities of developing cost estimates.
- Approach to and success of using partnering and Alternative Dispute Resolution.
- Proximity of prospective firms to the project site.
- Proposer's apparent resources and capacity to meet the needs of this project.
- The selected CM and all its consultants must have the capability to use the Internet within their normal business location(s) during normal business hours.

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>.

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 the 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 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.

Firms are requested to identify professional registrations, memberships and credentials including: CCCA, CCM, CCS, CDT, CPE, DBIA, LEED AP, 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.

Selection Rating Form

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Project Name Owner Agent Services FY 19-20 Proposer Firm _____
 Project Number DNR-190009 City, State, Zip _____

Selection Criteria		Value	Score
1. Primary Firm Location, Workload and Size (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 fees awarded by Contracting Authority in previous 24 months	Less than \$2,000,000	2	
	\$2,000,000 to \$5,000,000	1	
	More than \$5,000,000	0	
c. Number of relevant professionals	Less than 10 professionals	1	Max = 3
	10 to 20 professionals	2	
	More than 20 professionals	3	
2. Primary Firm Qualifications (Maximum 30 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 - 10	Max = 20
c. Technical staff	Experience / ability of technical staff to develop accurate estimates and schedules	0 - 5	
d. Construction administration staff	Experience / ability of superintendent to identify and solve issues during construction	0 - 5	
3. Key Consultant Qualifications (Maximum 20 points)			
a. Key discipline leads	Experience / ability of key consultants to perform effectively and collaboratively	0 - 15	
b. Proposed EDGE-certified Consultant participation*	One additional point for every 2 percent increase in consulting 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 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 6 projects	0 - 1	
	6 to 9 projects	2 - 3	
	More than 9 projects	4 - 5	
		Subtotal	

* Must be comprised of consulting firm(s) and NOT the primary firm
 ** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute

Notes:

Evaluator:

Name _____

Signature _____ Date _____