

WELCOME!

Professional Service Provider Forum

ODOT Bond Projects – Round 2

December 2, 2016 – 8:30am-12:00pm



Bond Projects Overview

Presenter Name

Title/Agency Name

Overview

- \$100,000,000 for soft and hard costs
- Over 14 projects
- Types of projects:
 - Full Service Maintenance Facilities
 - Outposts

Overview (cont'd)

- Anticipate inclusion of Professional Service Providers:
 - Geographically disbursed
 - New to State of Ohio work

Overview (cont'd)

- Projects anticipated to be located in the following counties:

**Carroll
Greene
Medina
Monroe
Montgomery**

**Perry
Portage
Stark
Union
Washington
Wood**

Questions?

Name, email address

Project Descriptions

Presenter Name

Title/Agency Name

Full Service Maintenance Facility (FSM)

- A FSM includes:
 - [insert SF] Truck storage building
 - Administrative and mechanical service areas
 - Cold storage structure
 - Salt storage structure
 - Material storage structure
 - Above ground fuel storage tank
 - Vehicle wash bay and brine/calcium system

Outpost Facility

- An Outpost Facility includes:
 - [insert SF and building type]
 - Salt storage with a 2000 ton capacity
 - New brine system
 - Washing bay for trucks inside
 - Equipment/ truck storage space

Questions?

Name, email address

ODOT Vertical Business Opportunities

Carrie Yost

Administrator of Statewide Facilities Operations

ODOT



OHIO DEPARTMENT OF TRANSPORTATION

JOHN R. KASICH, GOVERNOR

JERRY WRAY, DIRECTOR

Business Opportunities Upcoming 'Vertical' Projects

Carrie Yost

Administrator of Statewide Facilities Operations
Division of Facilities and Equipment Management

OFCC Conference 2016

Building Facility Portfolio

⌚ Encompasses:

- ⌚ Over 350 Sites
- ⌚ Over 1,600 Buildings
- ⌚ Hundreds of other assets
- ⌚ 7 million square feet under roof



Building Facility Portfolio

- ④ 13 Headquarter Complexes
- ④ Over 100 Full Service Maintenance Facilities
- ④ Over 130 County Outpost and Yard Facilities
- ④ Over 90 Rest Areas
- ④ 19 Weigh stations (Ohio Department of Public Safety)
- ④ Numerous Support Buildings & Accessories



Facilities Master Planning

- ④ ODOT has developed a long term plan to build facilities based on operational requirements while incorporating expected life-cycle needs.
- ④ ODOT's current replacement construction program for individual buildings or complete complexes is/shall address deficient and antiquated building facilities.



Facilities Master Planning

- ⌚ **Factors:**
 - ⌚ Location
 - ⌚ Service Area
 - ⌚ Operational Needs
 - ⌚ Environmental Aspects
 - ⌚ Function
 - ⌚ Need based assessment
 - ⌚ Scenario Planning
 - ⌚ Facility Type



Operational Facility Types

- ④ **Full-Service Maintenance** – manned facility providing full equipment maintenance services.
- ④ **Outpost** – minimally manned facility (full-time or seasonal) not providing full equipment maintenance services.
- ④ **Yard** – unmanned facility housing one or more support structures (i.e. salt storage, equipment storage, calcium/brine storage, fuel, etc.)



Full Service Maintenance



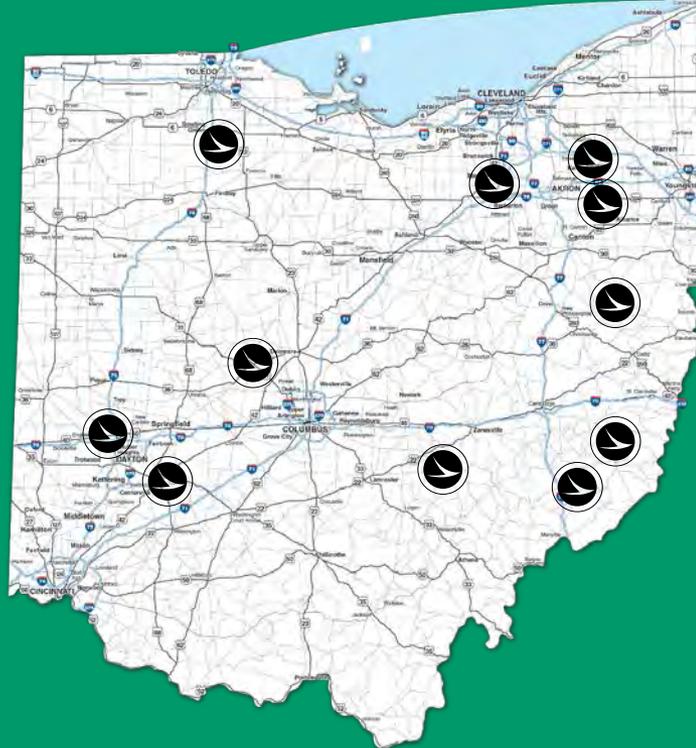
Fiscal Yrs 2017/2018 Projects

☉ Full Service Facilities:

- ☉ **Medina** County
- ☉ **Portage** County
- ☉ **Perry** County
- ☉ **Union** County
- ☉ **Montgomery** County
- ☉ **Greene** County
- ☉ **Washington** County
- ☉ **Monroe** County
- ☉ **Carroll** County

☉ Outpost Facilities:

- ☉ **Wood** County
- ☉ **Stark** County



Rest Area Facilities

- ④ Interstate and State Highway locations that offer various levels of service to the motoring public.
- ④ Janitorial Services - Local Community Rehabilitation Program (CRP)
- ④ Vending Services – Bureau for Services to the Visually Impaired (BSVI)



Rest Area Facilities



Fiscal Yrs 2017/2018 Projects

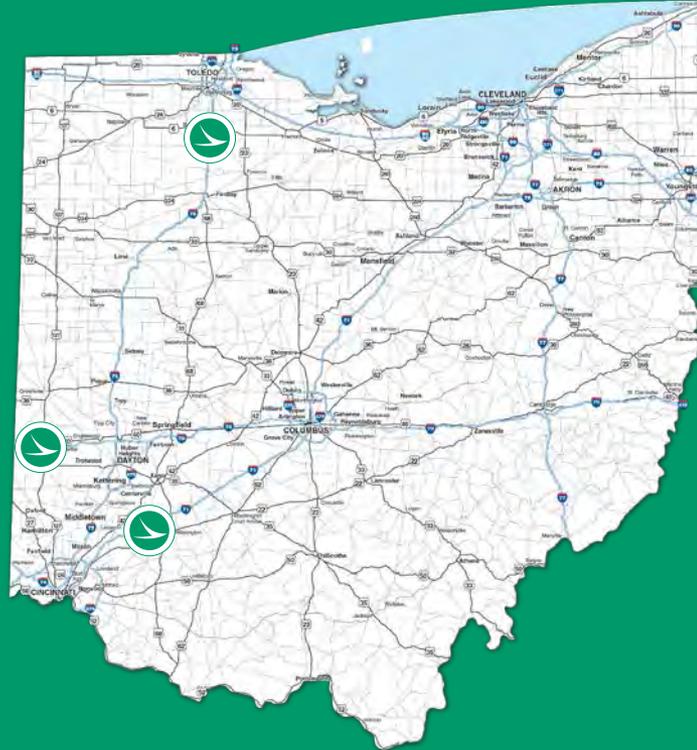
☉ Rest Areas:

☉ **Wood** County

☉ **Prototype Building**

☉ **Preble** County

☉ **Warren** County

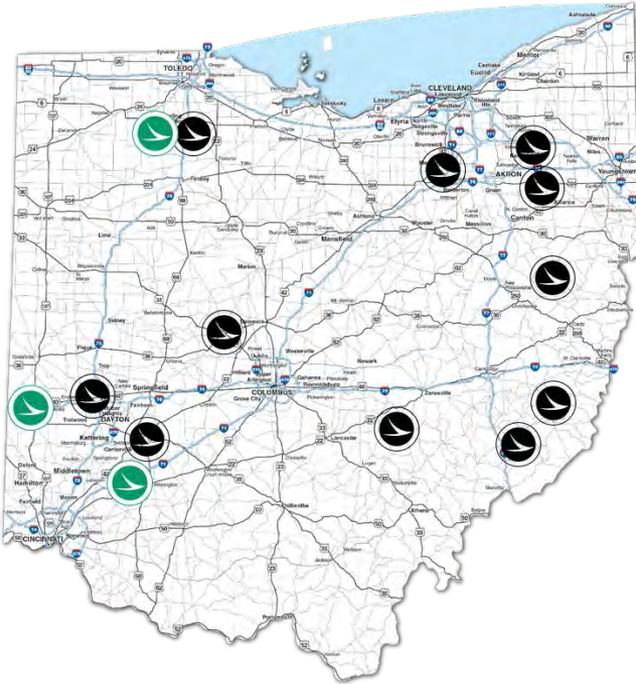




OHIO DEPARTMENT OF TRANSPORTATION

JOHN R. KASICH, GOVERNOR

JERRY WRAY, DIRECTOR



**Any
Questions?**

Thank you

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Questions?

Name, email address

The Selection Process

Presenter Name

Title/Agency Name

Selection Process Timeline

- Selection process is anticipated to be completed by mid-January 2017.
- Project service agreements to be executed as projects are initiated.
- Each project necessitates a timely project completion

Timeline (cont'd)

- Substantial completion required to be prior to preparations for 2019-2020 winter season, i.e., August, 2019.

Questions?

Name, email address

Lessons Learned: Completing the 330 Form

Jeff Kring

Agency | Higher Education Program Manager, OFCC

Topics:

- Request for Qualifications (RFQ)
- RFQ Rating Rubric
- **Statement of Qualifications F110-330**
- **Selection Rating Form**

Request for Qualifications (RFQ)

- RFQ posted on OFCC website
- May sign-up for automatic notifications

Request for Qualifications (Architect / Engineer) State of Ohio Standard Forms and Documents

Administration of Project: Select Organization

Project Name	<u>Project Name</u>	Response Deadline	<u>Date</u> _____ <u>Time</u> _____ local time
Project Location	<u>Project Location</u>	Project Number	<u>Project Number</u>
City / County	<u>City / County</u>	Project Manager	<u>Project Manager</u>
Owner	<u>Owner</u>	Contracting Authority	<u>Select Organization</u>
Delivery Method	<u>Select Delivery Method</u>	Prevailing Wages	<u>Select Type</u>
No. of paper copies requested (stapled, not bound)	<u>Number</u>	No. of electronic copies requested (PDF)	<u>Number</u>

Submit the requested number of Statements of Qualifications (Form F110-330) directly to Contact Name at E-mail or Mailing Address. See Section H of this RFQ for additional submittal instructions.

Submit all questions regarding this RFQ in writing to Contact Name at E-mail Address 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

REVISE AS INDICATED – DELETE THIS INSTRUCTION

This text is an example and is instructional. Insert a very brief description of the project. Include the purpose or function of the completed project. Include type or types of facilities, general business functions or each, basic functional needs, etc. Briefly describe site(s), including location, special features, and restrictions, etc. Attach appropriately developed Program of Requirements ("POR") or indicate that the Architect/Engineer ("A/E") will prepare the POR as an Additional Service.

Add additional project description here...

B. Scope of Services

REVISE AS APPROPRIATE – DELETE THIS INSTRUCTION

Introductory paragraph.

For projects advertised with an appropriately developed Program of Requirements (POR), upon award of the Agreement, commence with Design. For projects without such a POR, upon award of the Agreement, commence by developing the Program of Requirements.

The selected A/E, as a portion of its required Scope of Services and prior to submitting its proposals, will discuss and clarify with the Owner and/or the Contracting Authority, the cost breakdown of the Architect/Engineer Agreement detailed cost components to address the Owner's project requirements. 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: Program Verification, Schematic Design, Design Development, Construction Document Preparation, Bid and Award Support, Confirmed Documents, Construction Administration, Post-Construction, and Additional Services of all types.

Refer to the Select type of 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 not less than Number hours (excluding travel time) on-site construction administration services each week, including (1) attendance at progress meetings, (2) a written field report of each site visit, (3) on-site representation comprised of the A/E and its consultant staff involved in the primary design of the project, all having relevant and appropriate types of construction administration experience.

REVISE AS NECESSARY – DELETE THIS INSTRUCTION

Please list all major scope services needed to complete the selection process for successful project delivery. The specific scope of services must state particular building types, functional design or specialized professional services required to evaluate the level of experience of each applicant firm (e.g. parking garage, kitchen design, correctional facility, medical facility). The scope of services should also define the types of basic and additional professional design and administration

RFQ Rating Rubric

- Rubric to help evaluators
- Available on OFCC website

Professional Services Selection Rating Rubric State of Ohio Standard Forms and Documents

Selection Criteria					
General					
<ul style="list-style-type: none"> Qualifications should be scored on the information contained in the submitted F110-330. Exceptions: Criteria 1b – amount of contracts awarded can be verified. Criteria 5a - past performance information can be supplemented with public records and evaluations contained in OAKS CI from other Contracting Authorities and references can be checked. If a reviewer has a question during the review and scoring process, all other reviewers should receive the same information and feedback through the selection coordinator. No reviewer should ask questions or make direct contact with any eligible firm regarding selection during process. Consider all factors in totality and consistently apply scoring rationale across all RFQs. 					
1. Primary Firm Location, Workload and Size (Maximum 10 points)					
#	Criteria	Example			F110-330 Key
a.	Proximity of Firm to Project Site	Range	Value	Actual	Score
	Roadway miles measured from Lead Firm's office to project site.	0 - 50 miles	5	20	5
		50 - 100 miles	2	70	2
Over 100 miles		0	200	0	
b.	Amount of Fees / Contracts Awarded by Contracting Authority	Example #1 (A/E, C-A/E, CMA) (Max = 2 points)			F110-330 Key
	Total revenues in past 2 years awarded by Contracting Authority.	Range	Value	Actual	Score
		< \$100K	2	\$20K	2
		\$100K - \$500K	1	\$170K	1
	Workload (\$ for A/E, C-A/E, CMA is based on value of fees, while workload for CMR & DB is based on total contracts awarded by the Contracting Authority.	> \$500K	0	\$750K	0
		Example #2 (CMR & DB) (Max = 5 points)			Part 2 Section 11a (lead firm only)
Range		Value	Actual	Score	
< \$10M	5	\$2M	5		
\$10M - \$50M	2	\$25M	2		
> \$50M	0	\$60M	0		
c.	Number of Licensed / Relevant Professionals (Does not apply to CMR & DB)	Example (A/E, C-A/E) (Max = 3 points)			F110-330 Key
	Number of licensed professionals in Lead Firm providing primary services required for project.	Range	Value	Actual	Score
		Small = < 3		2	1
		Med = 3 - 7	Max = 3	7	2
		Large = > 7		12	3
				Part 2 Section 9c, Column 1 (lead firm only)	
2. Primary Firm Qualifications (Maximum 30-40 points, varies by type of service)					
#	Criteria	F110-330 Key			
a.	Project Management Lead	Part 1, Section B (Main point of contact(s) identified) Part 1, Section D (Project Mgt. Lead identified in table) Part 1, Section E, Items 17 (Project Mgt. Lead resume identified) Part 1, Section E, Item 18-23 (Project Mgt. Lead's education/training, licenses, years experience, etc.) Part 1, Section F, Item 28 (possible performance statistics) Part 1, Section G, Item 30 (participation in example projects) Part 1, Section H (possible additional info)			
	Option 1: Project Design Lead (Does not apply to CMR & CMA)	F110-330 Key Part 1, Section D (Design Lead identified in table) Part 1, Section E, Items 17 (Design Lead resume identified) Part 1, Section E, Item 18-23 (Design Lead's education/training, licenses, years experience, etc.) Part 1, Section F, Item 28 (possible performance statistics) Part 1, Section G, Item 30 (participation in example projects) Part 1, Section H (possible additional info)			
b.	Consider education level or professional licenses attained, number of years experience in industry, number of years as project design lead, number of similar projects completed, past performance of specific person in providing clients creative, effective and efficient design solutions to meet their needs.				

SOQ Instructions

- First 10 pages of SOQ
- Please read and follow!
 - Most ignored section

Statement of Qualifications

State of Ohio Standard Forms and Documents

State of Ohio agencies and state-supported institutions of higher education use this form to obtain information from Architect/Engineer ("A/E"), Construction Management ("CM"), and Design-Build ("DB") firms about their professional qualifications. State agencies select firms for A/E contracts on the basis of professional qualifications as required by Sections 153.65 through 153.71 of the Ohio Revised Code. This form may also be used to obtain the qualifications of CM, selected as required by Sections 9.33 through 9.333 of the Ohio Revised Code, or other professional services related to the design or construction of public improvements. This form may also be used in the Qualifications Phase of the Best Value Selection process for CM at Risk contracts as required by Section 9.334 of the Ohio Revised Code and Section 153.1-8-01 of the Ohio Administrative Code, and for Design-Build contracts as required by Section 153.693 of the Ohio Revised Code and Section 153.1-8-02 of the Ohio Administrative Code.

The Ohio Revised Code requires the public announcement of requirements for A/E and CM services (with some exceptions provided by other statutes), and the selection of at least three of the most highly qualified firms based on demonstrated competence and professional qualifications according to specific criteria published in the announcement. The Ohio Revised Code then requires the negotiation of a contract at a fair and reasonable price starting first with the most highly qualified firm. (Ohio Revised Code Sections 9.332 and 153.65 through 153.691.)

The information used to evaluate firms is from this form and other sources, including performance evaluations, any additional data requested by the Contracting Authority, and interviews with the most highly qualified firms and their references.

GENERAL INSTRUCTIONS

Do not include this instruction pages with your submission. Only include Part I and Part II of the form.

Part I presents the qualifications for a specific contract.

Part II presents the general qualifications of a firm or a specific branch office of a firm. Part II has two uses:

1. Submit Part II with each Statement of Qualifications. Prepare a separate Part II for each firm that will be part of the team proposed for a specific contract and submitted with Part I. If a firm has branch offices, submit a separate Part II for each branch office that has a key role on the team.
2. A public announcement is not required for certain contracts (e.g. the Ohio Facilities Construction Commission consultant list), and agencies may use Part II as a basis for selecting at least three of the most highly qualified firms for discussions prior to requesting submission of Part I. If a firm has branch offices, submit a separate Part II for each branch office seeking work.

INDIVIDUAL CONTRACTING AUTHORITY INSTRUCTIONS

Individual agencies may supplement these instructions in the Request for Qualifications. For example, they may limit the number of projects or number of pages submitted in Part I in response to a public announcement for a particular project. Carefully comply with any Contracting Authority instructions when preparing and submitting this form. Be as concise as possible and provide only the information requested by the Contracting Authority.

DEFINITIONS

Architect-Engineer Services: Has the same meaning as Ohio Revised Code 153.65(C) definition for professional design services: "services within the scope of practice of an architect or landscape architect registered under Chapter 4703 of the Revised Code or a professional engineer or surveyor registered under Chapter 4733 of the Revised Code." This term may also include the services of a Criteria A/E for a Design-Build project.

Construction Manager: Has the same meaning as Ohio Revised Code 9.33 definition of Construction Manager: "a person with substantial discretion and authority to plan, coordinate, manage, and direct all phases of a project for the construction, demolition, alteration, repair, or reconstruction of any public building, structure, or other improvement, but does not mean the person who provides the professional design services or who actually performs the construction, demolition, alteration, repair, or reconstruction work on the project."

Construction Manager at Risk: Has the same meaning as Ohio Revised Code 9.33 definition of Construction Manager at Risk: "a person with substantial discretion and authority to plan, coordinate, manage, and direct all phases of a project for the construction, demolition, alteration, repair, or reconstruction of any public building, structure, or other improvement, but does not mean the person who provides the professional design services or who actually performs the construction, demolition, alteration, repair, or reconstruction work on the project."

Design-Build: Has the same meaning as Ohio Revised Code 153.65 definition of Design-Build firm: "a person capable of providing Design-Build services, which is defined as services that form an integrated delivery system for which a person is responsible to a public authority for both the design and construction, demolition, alteration, repair, or reconstruction of a public improvement."

Branch Office: A geographically distinct place of business or subsidiary office of a firm that has a key role on the team.

Statement of Qualifications (SOQ)

- F110-330 Form used for all selections
 - A/E
 - C-A/E
 - CMA
 - CMR
 - DB
 - Specialty Consultants

STATEMENT OF QUALIFICATIONS			
PART I – CONTRACT SPECIFIC QUALIFICATIONS			
A. CONTRACT INFORMATION			
1. PROJECT TITLE AND LOCATION (City and County)			
2. ANNOUNCEMENT DATE		3. PROJECT NUMBER	
B. FIRM POINT OF CONTACT			
4. PROJECT REPRESENTATIVE NAME AND TITLE		5. PRESIDENT / CEO	
6. NAME OF FIRM (LEGAL NAME ON FILE WITH THE OHIO SECRETARY OF STATE)			
7. TELEPHONE NUMBER	8. FAX NUMBER	9. E-MAIL ADDRESS	
10. COUNTY	11. FTID NUMBER	12. WEB ADDRESS	
C. PROPOSED TEAM			
(Complete this section for the lead firm or joint venture partners, and all key consultants.)			
(Check)	13. FIRM NAME	14. ADDRESS	15. ROLE IN THIS CONTRACT
Lead Firm			
JV Partner			
Consultant			
a.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Check if EDGE certified	<input type="checkbox"/> Check if branch office Miles from project site	
b.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Check if EDGE certified	<input type="checkbox"/> Check if branch office	
c.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Check if EDGE certified	<input type="checkbox"/> Check if branch office	
d.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Check if EDGE certified	<input type="checkbox"/> Check if branch office	
e.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Check if EDGE certified	<input type="checkbox"/> Check if branch office	
f.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Check if EDGE certified	<input type="checkbox"/> Check if branch office	

Selection Rating Form

- Last page of RFQ
- Completing this form is evaluators goal
 - Please make it easy!

Architect / Engineer Selection Rating Form State of Ohio Standard Forms and Documents

Project Name Project Name Proposer Firm _____
 Project Number Project Number 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 aa miles	5
	aa miles to bb miles	2
	More than bb miles	0
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than \$cc	2
	\$cc to \$dd	1
	More than \$dd	0
c. Number of licensed professionals	Less than ee professionals	gg
	ee to ff professionals	hh
	More than ff professionals	ii
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 design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - ii
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - kk
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - ll
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 point for every 2 percent increase in professional services over the EDGE participation goal	0 - 5
4. Overall Team Qualifications (Maximum 10 points)		
a. Previous team collaboration	Less than mm sample projects	1
	mm to nn sample projects	2
	More than nn sample projects	3
b. LEED** Registered / Certified project experience	Registered projects	1
	Certified projects	2
c. BIM project experience	Training and knowledge	1
	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 oo projects	0 - 3
	oo to pp projects	4 - 6
	More than pp 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 qq projects	0 - 1
	qq to rr projects	2 - 3
	More than rr projects	4 - 5
		Subtotal

* Must be comprised of professional design services consulting firm(s) and NOT the lead firm

** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute

1a. Proximity of Firm to Project Site

Architect / Engineer Selection Rating Form State of Ohio Standard Forms and Documents

Project Name Project Name Proposer Firm _____
 Project Number Project Number 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 100 miles	5
	100 miles to 200 miles	2
	More than 200 miles	0

2. Primary Firm Qualifications (Maximum 30 points)			
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10	Max = 20
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - 11	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - 11	
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - 11	
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 point for every 2 percent increase in professional services over the EDGE participation goal	0 - 5	
4. Overall Team Qualifications (Maximum 10 points)			
a. Previous team collaboration	Less than <u>mm</u> sample projects	1	Max = 3
	<u>mm</u> to <u>nn</u> sample projects	2	
	More than <u>nn</u> 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	
	Less than <u>oo</u> projects	0 - 3	
	<u>oo</u> to <u>pp</u> projects	4 - 6	
b. Experience with similar projects / delivery methods	More than <u>pp</u> projects	7 - 10	
	Performance in completing projects within original construction budget and schedule	0 - 5	
c. Budget and schedule management	Less than <u>qq</u> projects	0 - 1	
	<u>qq</u> to <u>rr</u> projects	2 - 3	
	More than <u>rr</u> projects	4 - 5	
d. Knowledge of Ohio Capital Improvements process			
			Subtotal

* Must be comprised of professional design services consulting firm(s) and NOT the lead firm

** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute

1a. Proximity of Firm to Project Site

- Lead Firm's Address (Section C, 14a)
- Roadway miles measured from Lead Firm's office to Project location
- Office where work will be performed, not closest office
- Verified with Google Maps, Map Quest, etc.
 - We may arrive at a different distance
 - If multiple sites, use the furthest location

1b. Amount of Fees Awarded

Architect / Engineer Selection Rating Form State of Ohio Standard Forms and Documents

Project Name Project Name Proposer Firm _____
 Project Number Project Number City, State, Zip _____

Selection Criteria	Value	Score
1. Primary Firm Location, Workload and Size (Maximum 10 points)		
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than \$200,000	2
	\$200,000 to \$500,000	1
	More than \$500,000	0

2. Primary Firm Qualifications (Maximum 30 points)			
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10	Max = 20
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - 11	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - 11	
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - 11	
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 point for every 2 percent increase in professional services over the EDGE participation goal	0 - 5	
4. Overall Team Qualifications (Maximum 10 points)			
a. Previous team collaboration	Less than <u>mm</u> sample projects	1	Max = 3
	<u>mm</u> to <u>nn</u> sample projects	2	
	More than <u>nn</u> 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 <u>oo</u> projects	0 - 3	
	<u>oo</u> to <u>pp</u> projects	4 - 6	
	More than <u>pp</u> 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 <u>qq</u> projects	0 - 1	
	<u>qq</u> to <u>rr</u> projects	2 - 3	
	More than <u>rr</u> projects	4 - 5	
* Must be comprised of professional design services consulting firm(s) and NOT the lead firm ** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute			Subtotal

1b. Amount of Fees Awarded

- Total revenues in past 2 years
- Revenues awarded by Contracting Authority
- Workload for A/E, C-A/E, and CMA based on value of fees
- Workload for CMR and DB based on total contracts

1b. Amount of Fees Awarded

- Fee Ranges (SOQ Form, Part II)

11. TOTAL REVENUES FOR LAST 2 YEARS <i>(Insert revenue index number shown at right)</i> <i>*For OFCC administration, include contracts administered by OFCC, SAO, and OSFC</i>		REVENUE INDEX NUMBER	
a. Work for this Contracting Authority*	<input type="text"/>	1. Less than \$50,000	6. \$1,000,000 to less than \$2,000,000
b. Other State Work <i>(see instructions)</i>	<input type="text"/>	2. \$50,000 to less than \$100,000	7. \$2,000,000 to less than \$5,000,000
c. Total State Work	<input type="text"/>	3. \$100,000 to less than \$200,000	8. \$5,000,000 to less than \$10,000,000
		4. \$200,000 to less than \$500,000	9. \$10,000,000 to less than \$20,000,000
		5. \$500,000 to less than \$1,000,000	10. \$20,000,000 to less than \$50,000,000

- Revenues may be verified (database)
 - We may arrive at a different total

1c. Number of Licensed Professionals

Architect / Engineer Selection Rating Form State of Ohio Standard Forms and Documents

Project Name Project Name Proposer Firm _____
 Project Number Project Number City, State, Zip _____

Selection Criteria	Value	Score
1. Primary Firm Location, Workload and Size (Maximum 10 points)		
c. Number of licensed professionals	Less than 5 professionals	1
	5 to 20 professionals	3
	More than 20 professionals	2
		Max = 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 design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - 11	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - 11	Max = 20
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - 11	
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 point for every 2 percent increase in professional services over the EDGE participation goal	0 - 5	
4. Overall Team Qualifications (Maximum 10 points)			
a. Previous team collaboration	Less than mm sample projects	1	Max = 3
	mm to nn sample projects	2	
	More than nn sample projects	3	
b. LEED** Registered / Certified project experience	Registered projects	1	Max = 2
	Certified projects	2	
	Training and knowledge	1	
c. BIM project experience	Direct project experience	3	Max = 3
	Clarity of responsibility / communication demonstrated by table of organization	0 - 2	
d. Team organization			
5. Overall Team Experience (Maximum 30 points)			
a. Previous team performance	Past performance as indicated by evaluations and letters of reference	0 - 10	
	Less than oo projects	0 - 3	
	oo to pp projects	4 - 6	
b. Experience with similar projects / delivery methods	More than pp projects	7 - 10	
	Performance in completing projects within original construction budget and schedule	0 - 5	
c. Budget and schedule management	Less than qq projects	0 - 1	
	qq to rr projects	2 - 3	
	More than rr projects	4 - 5	
d. Knowledge of Ohio Capital Improvements process			
			Subtotal

* Must be comprised of professional design services consulting firm(s) and NOT the lead firm

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1c. Number of Licensed Professionals

- RFQ Section D: Services Required, lists Primary and Secondary services requested

D. Services Required (see note below)



Primary	<u>Architecture</u>
Secondary	<u>Mechanical Engineering</u>
	<u>Electrical Engineering</u>
	<u>Structural Engineering</u>
	<u> </u>
	<u> </u>
	<u> </u>
Others	<u>Other Discipline(s)</u>

2a-d. Primary Firm Qualifications

Architect / Engineer Selection Rating Form State of Ohio Standard Forms and Documents

Project Name Project Name Proposer Firm _____
 Project Number Project Number 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 <u>aa</u> miles	5
	<u>aa</u> miles to <u>bb</u> miles	2
	More than <u>bb</u> miles	0

2. Primary Firm Qualifications (Maximum 30 points)				
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10	Max = 20	
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - 5		
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - 5		
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - 10		

a. Previous team collaboration	Less than <u>mm</u> sample projects	1	Max = 3	
	<u>mm</u> to <u>nn</u> sample projects	2		
	More than <u>nn</u> 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 <u>oo</u> projects	0 - 3		
	<u>oo</u> to <u>pp</u> projects	4 - 6		
	More than <u>pp</u> 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 <u>qq</u> projects	0 - 1		
	<u>qq</u> to <u>rr</u> projects	2 - 3		
	More than <u>rr</u> projects	4 - 5		
* Must be comprised of professional design services consulting firm(s) and NOT the lead firm ** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute			Subtotal	

2a-d. Primary Firm Qualifications

- 2a. Project Management Lead
- 2b. Project Design Lead/Project Admin. Lead
- 2c. Technical Staff
- 2d. Construction Administration Staff

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 design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - 5	Max = 20	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - 5		
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - 10		

- NOTE: use roles as listed in SOQ Instructions

2a-d. Primary Firm Qualifications

- Resume will be evaluated using criteria in Selection Rating Form

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT					
<i>(Complete one Section E for each key person. Limit one page per person)</i>					
16. NAME		17. ROLE IN THIS CONTRACT		18. YEARS EXPERIENCE	
[REDACTED]		[REDACTED]		a. TOTAL	b. WITH CURRENT FIRM
[REDACTED]		[REDACTED]		[REDACTED]	[REDACTED]
19. FIRM NAME AND LOCATION (City and State)		20. EDUCATION (Degree and Specialization)		21. CURRENT OH PROF REGISTRATIONS (List Discipline)	
[REDACTED]		[REDACTED]		[REDACTED]	
22. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)					
[REDACTED]					
23. RELEVANT PROJECTS (Up to a maximum of 5 samples)					
(1) Title, Client & Location (City, State)	(2) Building Type, Size & Project Cost / Performance	(3) Type of Construction, Delivery Model & Services	(4) Date Completed		(5) Example Project Key No.
			Design	Construction	
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
a. (6) Role (Benefit / Value to Client)			<input type="checkbox"/> Check if project performed with current firm		
[REDACTED]			[REDACTED]		

2a-d. Primary Firm Qualifications

- Education level and professional licenses
- Experience in project role
- Similar projects completed
- Review SOQ Section H to find additional relevant information about key team members
- Review first page of Resume (**1 pg. max**)
 - Subsequent pages will not be evaluated

2a-d. Primary Firm Qualifications

- **Project Management Lead**
 - managing scope, schedule, and budget
- **Project Design Lead**
 - creative, effective, efficient design solutions
- **Technical Staff**
 - communication, timely admin. of processes
- **Construction Administration Staff**
 - identify issues, timely problem solving

2a-d. Primary Firm Qualifications

Common Challenges:

- Resume does not include information directly related to scoring criteria
- Section H does not include specific information addressing scoring criteria
- Example Project pages do not include information directly related to scoring criteria
 - How are evaluators going to score criteria?

3a. Key Consultant Qualifications

Architect / Engineer Selection Rating Form State of Ohio Standard Forms and Documents

Project Name Project Name Proposer Firm _____
 Project Number Project Number 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 <u>aa</u> miles	5
	<u>aa</u> miles to <u>bb</u> miles	2
	More than <u>bb</u> miles	0
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than \$ <u>cc</u>	2
	\$ <u>cc</u> to \$ <u>dd</u>	1
	More than \$ <u>dd</u>	0
c. Number of licensed professionals	Less than <u>ee</u> professionals	<u>gg</u>
	<u>ee</u> to <u>ff</u> professionals	<u>hh</u>
	More than <u>ff</u> professionals	<u>ii</u>
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 design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - <u>jj</u>
c. Technical staff	Experience / ability of technical staff to create fully-detailed construction documents	0 - <u>kk</u>

3. Key Consultant Qualifications (Maximum 20 points)		
a. Key discipline leads	Experience / ability of key consultants to perform effectively and collaboratively	0 - 15

4. Overall Team Qualifications (Maximum 10 points)		
a. Previous team collaboration	Less than <u>mm</u> sample projects	1
	<u>mm</u> to <u>nn</u> sample projects	2
	More than <u>nn</u> sample projects	3
b. LEED** Registered / Certified project experience	Registered projects	1
	Certified projects	2
c. BIM project experience	Training and knowledge	1
	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 <u>oo</u> projects	0 - 3
	<u>oo</u> to <u>pp</u> projects	4 - 6
	More than <u>pp</u> 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 <u>qq</u> projects	0 - 1
	<u>qq</u> to <u>rr</u> projects	2 - 3
	More than <u>rr</u> projects	4 - 5
* Must be comprised of professional design services consulting firm(s) and NOT the lead firm ** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute		Subtotal

3a. Key Consultant Qualifications

- Summary of all key disciplines
- Includes qualifications of EDGE partners
- Review Resumes ([Section E](#))
- Similar evaluation as Lead Firm's Qualifications

3a. Key Consultant Qualifications

- Education level and professional licenses
- Experience in project role
- Similar projects completed
- Review SOQ Section H to find additional relevant information about key team members
- Review first page of Resume (**1 pg. max**)
 - Subsequent pages will not be evaluated

3b. EDGE Consultant Participation

Architect / Engineer Selection Rating Form State of Ohio Standard Forms and Documents

Project Name Project Name Proposer Firm _____
 Project Number Project Number 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 <u>aa</u> miles	5
	<u>aa</u> miles to <u>bb</u> miles	2
	More than <u>bb</u> miles	0
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than <u>\$\$\$</u>	2
	<u>\$\$\$</u> to <u>\$\$\$</u>	1
	More than <u>\$\$\$</u>	0
c. Number of licensed professionals	Less than <u>gg</u> professionals	<u>gg</u>
	<u>gg</u> to <u>ff</u> professionals	<u>ff</u>
	More than <u>ff</u> professionals	<u>ff</u>
2. Primary Firm Qualifications (Maximum 30 points)		
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10
	Experience / creativity of project designer to	- -

3. Key Consultant Qualifications (Maximum 20 points)		
b. Proposed EDGE-certified Consultant participation*	One point for every 2 percent increase in professional services over the EDGE participation goal	0 - 5

4. Overall Team Qualifications (Maximum 10 points)		
a. Previous team collaboration	Less than <u>mm</u> sample projects	1
	<u>mm</u> to <u>nn</u> sample projects	2
	More than <u>nn</u> sample projects	3
b. LEED** Registered / Certified project experience	Registered projects	1
	Certified projects	2
c. BIM project experience	Training and knowledge	1
	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 <u>oo</u> projects	0 - 3
	<u>oo</u> to <u>pp</u> projects	4 - 6
	More than <u>pp</u> 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 <u>qq</u> projects	0 - 1
	<u>qq</u> to <u>rr</u> projects	2 - 3
	More than <u>rr</u> projects	4 - 5
* Must be comprised of professional design services consulting firm(s) and NOT the lead firm ** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute		Subtotal

3b. EDGE Consultant Participation*

- * Must be comprised of professional services consulting firm(s) and NOT lead firm
- Is there a fully executed Statement of Intent to Contract and Perform?
- Is the proposed EDGE commitment over the goal advertised in Section F of RFQ?

F. EDGE Participation Goal

Percent of *Initial* TOTAL A/E Fee

5.0%

EDGE Commitment / Statement of Intent

Errors/Omissions

- EDGE Cert. #
- Scope of Services
- % Participation
- Signatures

— Is certification still valid for vendor?

H. ADDITIONAL INFORMATION

344. PROVIDE ANY ADDITIONAL INFORMATION REQUESTED BY THE CONTRACTING AUTHORITY. USE THE NEXT PAGE OR ATTACH ADDITIONAL SHEETS AS NEEDED.

**EDGE PARTICIPATION
STATEMENT OF INTENT TO CONTRACT AND PERFORM**

Project Name _____ Project Number _____
Vendor Name _____

EDGE-certified Business Enterprise ("EBE")

EBE Name _____ Phone _____
Address _____ Fax _____
City, State ZIP _____ E-mail _____
EBE Certification Number _____

Briefly describe services, work or supplies to be provided by the EBE (may use industry codes):

Percentage of proposed EBE participation: _____% Anticipated cost or fee payable to EBE firm: \$ _____

*If indicating less than the advertised EDGE participation, the Vendor must request a waiver and provide a "Demonstration of Good Faith Effort" form and supporting documentation that the Vendor attempted to meet the advertised participation goal established for this project by the Director of the Ohio Department of Administrative Services pursuant to Section 123.152 of the Ohio Revised Code.

Certified by EBE and by the Vendor
The Vendor certifies that it intends to contract with the EBE for the portion of the agreement described above related to this project. The named EBE certifies that it intends to contract with the named Vendor and intends to provide the portion of the Vendor's scope of services as described above and for the anticipated cost or fee as indicated above.

If the Vendor is not selected to provide services for this Project, this Statement of Intent shall be null and void.

For CM at Risk and Design-Build contracts, please indicate Stage(s) of Project that EDGE services will be performed:

Preconstruction Stage Services Construction Stage Services Construction Stage Subcontracted Work

EDGE-certified Business Enterprise **Vendor**

Name _____ Name _____
Signature _____ Date _____ Signature _____ Date _____

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3b. EDGE Consultant Participation

- Calculate EDGE points. 1 point for every 2% increase over published goal

- **EXAMPLE:**

5% = 0 Pts.

9% = 2 Pts.

13% = 4 Pts.

6% = 0 Pts.

10% = 2 Pts.

14 % = 4 Pts.

7% = 1 Pt.

11% = 3 Pts.

15 % = 5 Pts.

8% = 1 Pt.

12% = 3 Pts.

- < 5.0% does not meet goal

4a. Overall Team Qualifications

Architect / Engineer Selection Rating Form State of Ohio Standard Forms and Documents

Project Name Project Name Proposer Firm _____
 Project Number Project Number 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 <u>aa</u> miles	5
	<u>aa</u> miles to <u>bb</u> miles	2
	More than <u>bb</u> miles	0
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than \$ <u>cc</u>	2
	\$ <u>cc</u> to \$ <u>dd</u>	1
	More than \$ <u>dd</u>	0
c. Number of licensed professionals	Less than <u>ee</u> professionals	<u>gg</u>
	<u>ee</u> to <u>ff</u> professionals	<u>hh</u>
	More than <u>ff</u> professionals	<u>ii</u>
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 design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - <u>jj</u>
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - <u>kk</u>
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - <u>ll</u>
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 point for every 2 percent increase in professional services over the EDGE	0 - 5

4. Overall Team Qualifications (Maximum 10 points)			
a. Previous team collaboration	Less than 4 sample projects	1	Max = 3
	4 to 6 sample projects	2	
	More than 6 sample projects	3	

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 <u>oo</u> projects	0 - 3	
	<u>oo</u> to <u>pp</u> projects	4 - 6	
	More than <u>pp</u> 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 <u>qq</u> projects	0 - 1	
	<u>qq</u> to <u>rr</u> projects	2 - 3	
	More than <u>rr</u> projects	4 - 5	
* Must be comprised of professional design services consulting firm(s) and NOT the lead firm ** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute			Subtotal

4a. Previous team collaboration

- Review Section G. Matrix
- Typical key members include:
 - Project Management Lead
 - Project Design Lead/Project Admin. Lead
 - Technical Staff
 - Construction Administration Lead
 - Key Consultant Leads
- How many projects from Section F have listed team members worked together?

4a. Previous team collaboration

G. KEY PERSONNEL PARTICIPATION IN EXAMPLE PROJECTS

30. NAMES OF KEY PERSONNEL (From Section E, Block 16)	31. ROLE IN THIS CONTRACT (From Section E, Block 17)	32. EXAMPLE PROJECTS LISTED IN SECTION F (Fill in "Example Projects Key" section below before completing table. Place "X" under project key number for participation in same or similar role.)										
		1	2	3	4	5	6	7	8	9	10	
Justin Charge	Project Management Lead	X	X	X	X	X	X	X	X	X		
Dee Sine	Project Design Lead	X	X									
Mark Upt	Technical Staff (Proj Arch)	X	X		X		X	X	X			
Robert Builder	Construction Admin. Lead	X	X				X	X	X			
H. Cooley	Proj. Mgmt. Lead (PME)	X		X			X			X	X	

- Majority of **key** team members collaborating equals half of identified team
- **EXAMPLE:** half of team members have worked together on 5 of 10 projects

4b. LEED Project Experience

Architect / Engineer Selection Rating Form State of Ohio Standard Forms and Documents

Project Name Project Name Proposer Firm _____
 Project Number Project Number 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 <u>aa</u> miles	5
	<u>aa</u> miles to <u>bb</u> miles	2
	More than <u>bb</u> miles	0
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than \$ <u>cc</u>	2
	\$ <u>cc</u> to \$ <u>dd</u>	1
	More than \$ <u>dd</u>	0
c. Number of licensed professionals	Less than <u>ee</u> professionals	<u>gg</u>
	<u>ee</u> to <u>ff</u> professionals	<u>hh</u>
	More than <u>ff</u> professionals	<u>ii</u>
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 design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - <u>jj</u>
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - <u>kk</u>
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - <u>ll</u>
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 point for every 2 percent increase in professional services over the EDGE	0 - 5

4. Overall Team Qualifications (Maximum 10 points)			
b. LEED** Registered / Certified project experience	Registered projects	1	Max = 2
	Certified projects	2	

5. Overall Team Experience (Maximum 30 points)			
a. Previous team performance	Past performance as indicated by evaluations and letters of reference	0 - 10	
	Less than <u>oo</u> projects	0 - 3	
	<u>oo</u> to <u>pp</u> projects	4 - 6	
b. Experience with similar projects / delivery methods	More than <u>pp</u> projects	7 - 10	
	Performance in completing projects within original construction budget and schedule	0 - 5	
c. Budget and schedule management	Less than <u>qq</u> projects	0 - 1	
	<u>qq</u> to <u>rr</u> projects	2 - 3	
	More than <u>rr</u> projects	4 - 5	
* Must be comprised of professional design services consulting firm(s) and NOT the lead firm ** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute			Subtotal

4b. LEED Project Experience

- Key team members with LEED certification (LEED AP, LEED AP BD+C)
- Key team members with experience implementing/administering LEED projects
- Projects registered with USGBC
- LEED certified projects
- Volume/number of LEED registered/certified projects?

4c. BIM Project Experience

Architect / Engineer Selection Rating Form State of Ohio Standard Forms and Documents

Project Name Project Name Proposer Firm _____
 Project Number Project Number 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 <u>aa</u> miles	5	
	<u>aa</u> miles to <u>bb</u> miles	2	
	More than <u>bb</u> miles	0	
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than \$ <u>cc</u>	2	
	\$ <u>cc</u> to \$ <u>dd</u>	1	
	More than \$ <u>dd</u>	0	
c. Number of licensed professionals	Less than <u>ee</u> professionals	<u>gg</u>	Max = 3
	<u>ee</u> to <u>ff</u> professionals	<u>hh</u>	
	More than <u>ff</u> professionals	<u>ii</u>	
2. Primary Firm Qualifications (Maximum 30 points)			
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10	Max = 20
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - <u>jj</u>	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - <u>kk</u>	
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - <u>ll</u>	
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 point for every 2 percent increase in professional services over the EDGE	0 - 5	

4. Overall Team Qualifications (Maximum 10 points)			
c. BIM project experience	Training and knowledge	1	Max = 3
	Direct project experience	3	

5. Overall Team Experience (Maximum 30 points)			
a. Previous team performance	Past performance as indicated by evaluations and letters of reference	0 - 10	
	Less than <u>oo</u> projects	0 - 3	
	<u>oo</u> to <u>pp</u> projects	4 - 6	
b. Experience with similar projects / delivery methods	More than <u>pp</u> projects	7 - 10	
	Performance in completing projects within original construction budget and schedule	0 - 5	
c. Budget and schedule management	Less than <u>qq</u> projects	0 - 1	
	<u>qq</u> to <u>rr</u> projects	2 - 3	
	More than <u>rr</u> projects	4 - 5	
d. Knowledge of Ohio Capital Improvements process	Less than <u>qq</u> projects	0 - 1	
	<u>qq</u> to <u>rr</u> projects	2 - 3	
	More than <u>rr</u> projects	4 - 5	
* Must be comprised of professional design services consulting firm(s) and NOT the lead firm ** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute		Subtotal	

4c. BIM project experience

- Key team members with BIM experience
- BIM training/knowledge vs. BIM experience
- Depth of BIM experience
 - Design
 - Use of 3D presentation materials
 - Systems modeling/analysis
 - Clash detection
 - Quantity take-offs/estimating
 - Shop drawings
 - Construction administration

4d. Team organization

Architect / Engineer Selection Rating Form State of Ohio Standard Forms and Documents

Project Name Project Name Proposer Firm _____
Project Number Project Number 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 <u>aa</u> miles	5	
	<u>aa</u> miles to <u>bb</u> miles	2	
	More than <u>bb</u> miles	0	
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than \$ <u>cc</u>	2	
	\$ <u>cc</u> to \$ <u>dd</u>	1	
	More than \$ <u>dd</u>	0	
c. Number of licensed professionals	Less than <u>ee</u> professionals	<u>gg</u>	Max = 3
	<u>ee</u> to <u>ff</u> professionals	<u>hh</u>	
	More than <u>ff</u> professionals	<u>ii</u>	
2. Primary Firm Qualifications (Maximum 30 points)			
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10	Max = 20
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - <u>jj</u>	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - <u>kk</u>	
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - <u>ll</u>	
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 point for every 2 percent increase in professional services over the EDGE	0 - 5	

4. Overall Team Qualifications (Maximum 10 points)			
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	
	Less than <u>oo</u> projects	0 - 3	
	<u>oo</u> to <u>pp</u> projects	4 - 6	
b. Experience with similar projects / delivery methods	More than <u>pp</u> projects	7 - 10	
	Performance in completing projects within original construction budget and schedule	0 - 5	
c. Budget and schedule management	Less than <u>qq</u> projects	0 - 1	
	<u>qq</u> to <u>rr</u> projects	2 - 3	
	More than <u>rr</u> projects	4 - 5	
* Must be comprised of professional design services consulting firm(s) and NOT the lead firm ** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute		Subtotal	

4d. Team organization

- Organizational chart included
- Roles and responsibilities defined:
 - Owner/Agency
 - Contracting Authority
 - Key team members (identify Consultants & EDGE)
- Clear lines of communication
- Main points of contact identified
- Defined transition of leadership between project phases

5a. Previous team performance

Architect / Engineer Selection Rating Form State of Ohio Standard Forms and Documents

Project Name Project Name Proposer Firm _____
 Project Number Project Number 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 <u>aa</u> miles	5	
	<u>aa</u> miles to <u>bb</u> miles	2	
	More than <u>bb</u> miles	0	
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than \$ <u>cc</u>	2	
	\$ <u>cc</u> to \$ <u>dd</u>	1	
	More than \$ <u>dd</u>	0	
c. Number of licensed professionals	Less than <u>ee</u> professionals	<u>gg</u>	Max = 3
	<u>ee</u> to <u>ff</u> professionals	<u>hh</u>	
	More than <u>ff</u> professionals	<u>ii</u>	
2. Primary Firm Qualifications (Maximum 30 points)			
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10	Max = 20
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - <u>jj</u>	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - <u>kk</u>	
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - <u>ll</u>	
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 point for every 2 percent increase in professional services over the EDGE participation goal	0 - 5	
4. Overall Team Qualifications (Maximum 10 points)			
a. Previous team collaboration	Less than <u>mm</u> sample projects	1	Max = 3
	<u>mm</u> to <u>nn</u> sample projects	2	
	More than <u>nn</u> 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	

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

5a. Previous team performance

- Materials included in SOQ Sect. E, F, and H:
 - Excerpts/quotes
 - Letters of reference
 - Performance evaluations
- Specificity of comments
- Individuals specifically praised
- Level of service provided
- Date of reference provided
- Individual providing references

5b. Experience with similar projects

Architect / Engineer Selection Rating Form State of Ohio Standard Forms and Documents

Project Name Project Name Proposer Firm _____
 Project Number Project Number 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 <u>aa</u> miles	5	
	<u>aa</u> miles to <u>bb</u> miles	2	
	More than <u>bb</u> miles	0	
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than \$ <u>cc</u>	2	
	\$ <u>cc</u> to \$ <u>dd</u>	1	
	More than \$ <u>dd</u>	0	
c. Number of licensed professionals	Less than <u>ee</u> professionals	<u>gg</u>	Max = 3
	<u>ee</u> to <u>ff</u> professionals	<u>hh</u>	
	More than <u>ff</u> professionals	<u>ii</u>	
2. Primary Firm Qualifications (Maximum 30 points)			
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10	Max = 20
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - <u>jj</u>	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - <u>kk</u>	
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - <u>ll</u>	
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 point for every 2 percent increase in professional services over the EDGE participation goal	0 - 5	
4. Overall Team Qualifications (Maximum 10 points)			
a. Previous team collaboration	Less than <u>mm</u> sample projects	1	Max = 3
	<u>mm</u> to <u>nn</u> sample projects	2	
	More than <u>nn</u> 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	

5. Overall Team Experience (Maximum 30 points)			
b. Experience with similar projects / delivery methods	Less than 4 projects	0 - 3	
	4 to 6 projects	4 - 6	
	More than 6 projects	7 - 10	

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

5b. Experience with similar projects

- Review Relevant Project Experience Matrix F

F. RELEVANT PROJECT EXPERIENCE MATRIX

		Major Scope of Work requirements as identified in the project advertisement.									
		Scope	Scope	Scope	Scope	Scope	Scope	Scope	Scope	Scope	Scope
Example Project Name (Place "X" under Project Scope)											
1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- How many projects have a majority of similar scopes of work?
- Also review Section H for additional information

5c. Budget and Schedule Management

Architect / Engineer Selection Rating Form State of Ohio Standard Forms and Documents

Project Name Project Name Proposer Firm _____
 Project Number Project Number 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 <u>aa</u> miles	5	
	<u>aa</u> miles to <u>bb</u> miles	2	
	More than <u>bb</u> miles	0	
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than <u>ccc</u>	2	
	<u>ccc</u> to <u>ddd</u>	1	
	More than <u>ddd</u>	0	
c. Number of licensed professionals	Less than <u>ee</u> professionals	<u>gg</u>	Max = 3
	<u>ee</u> to <u>ff</u> professionals	<u>hh</u>	
	More than <u>ff</u> professionals	<u>ii</u>	
2. Primary Firm Qualifications (Maximum 30 points)			
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10	Max = 20
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - <u>jj</u>	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - <u>kk</u>	
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - <u>ll</u>	
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 point for every 2 percent increase in professional services over the EDGE participation goal	0 - 5	
4. Overall Team Qualifications (Maximum 10 points)			
a. Previous team collaboration	Less than <u>mm</u> sample projects	1	Max = 3
	<u>mm</u> to <u>nn</u> sample projects	2	
	More than <u>nn</u> 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)			
c. Budget and schedule management	Performance in completing projects within original construction budget and schedule	0 - 5	

* Must be comprised of professional design services consulting firm(s) and NOT the lead firm ** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute	Subtotal	
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5c. Budget and Schedule Management

- Review Project Management Lead Resume
- Review Example Project pages
- Review Section H for additional information
 - Are there tables summarizing performance?
 - Are the performance metrics on relevant projects?
 - Are the performance metrics recent?
 - How biased are the chosen metrics?

5d. Knowledge of Ohio Process

Architect / Engineer Selection Rating Form State of Ohio Standard Forms and Documents

Project Name Project Name Proposer Firm _____
 Project Number Project Number 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 <u>aa</u> miles	5	
	<u>aa</u> miles to <u>bb</u> miles	2	
	More than <u>bb</u> miles	0	
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than \$ <u>cc</u>	2	
	\$ <u>cc</u> to \$ <u>dd</u>	1	
	More than \$ <u>dd</u>	0	
c. Number of licensed professionals	Less than <u>ee</u> professionals	<u>gg</u>	Max = 3
	<u>ee</u> to <u>ff</u> professionals	<u>hh</u>	
	More than <u>ff</u> professionals	<u>ii</u>	
2. Primary Firm Qualifications (Maximum 30 points)			
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10	Max = 20
b. Project design lead	Experience / creativity of project designer to achieve owner's vision and requirements	0 - <u>jj</u>	
c. Technical staff	Experience / ability of technical staff to create fully coordinated construction documents	0 - <u>kk</u>	
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - <u>ll</u>	
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 point for every 2 percent increase in professional services over the EDGE participation goal	0 - 5	
4. Overall Team Qualifications (Maximum 10 points)			
a. Previous team collaboration	Less than <u>mm</u> sample projects	1	Max = 3
	<u>mm</u> to <u>nn</u> sample projects	2	
	More than <u>nn</u> 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	

5. Overall Team Experience (Maximum 30 points)			
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 professional design services consulting firm(s) and NOT the lead firm		Subtotal	
** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute			

5d. Knowledge of Ohio Process

- Do the Project Management Lead, Project Admin. Lead, and Construction Admin. Staff have previous knowledge of State of Ohio capital improvement processes?
 - Use of Standard Agreements
 - Use of Standard Forms
 - Use of Standard Processes
 - Use of OAKS CI

Disclosure of Past Performance

- Has firm been responsive to past clients?

H. ADDITIONAL INFORMATION

34e. PROVIDE ANY ADDITIONAL INFORMATION REQUESTED BY THE CONTRACTING AUTHORITY. ATTACH ADDITIONAL SHEETS AS NEEDED.

DISCLOSURE OF PAST PERFORMANCE

The Lead Firm or Joint Venture and all Consultants identified in Section C shall disclose any lawsuits or claims initiated by public owners or requests to address issues on past projects by responding to the following questions. Summarize all team member firms on one page. Please indicate "none" for each firm when appropriate.

1. List any lawsuits, claims, or demands, related to the company or organization's participation on any public contract, during the past 5 years, whether the lawsuit, claim or demand was initiated by the public owner against the company or organization or initiated against the company or organization in its capacity as a subcontractor.

■

2. In the past five years, has the company or organization been requested by a public owner to return to address construction workmanship, performance, or installation issues. If yes, please state the project and type of contract, and describe your response to the request.

■

I. AUTHORIZED REPRESENTATIVE

All of the foregoing in Part I is a statement of facts.

35. SIGNATURE

36. DATE

37. NAME AND TITLE

General Challenges

- Lack of info. directly related to criteria
- Confusing or inconsistent info. within SOQ
- Incomplete forms/submission
 - EDGE Statement of Intent to Contract & Perform
- Overall submission length

Questions?

Jeff Kring, jeff.kring@ofcc.ohio.gov

Professional Service Agreement Highlights

Presenter Name

Title, Agency Name

Agreement Highlights

- Enter text here

Questions?

Name, email address

Delivery Expectations

Presenter Name

Title, Agency Name

Delivery Expectations

- Enter text here

Questions?

Name, email address

Delivery Schedules

Presenter Name

Title, Agency Name

Delivery Expectations

- Enter text here

Questions?

Name, email address

Questions?