

# Request for Qualifications (Planning Services)

## State of Ohio Standard Forms and Documents

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**Administration of Project:** Local Higher Education

Project Name	<u>Stone Lab Master Plan</u>	Response Deadline	<u>3/27/2019</u>	<u>2:00 p.m.</u> local time
Project Location	<u>South Bass Island</u>	Project Number	<u>OSU-190493</u>	
City / County	<u>Put-in-Bay / Ottawa</u>	Project Manager	<u>Kimberly Moss</u>	
Owner	<u>The Ohio State University</u>	Contracting Authority	<u>Local Higher Education</u>	
No. of paper copies requested (stapled, not bound)	<u>0</u>	No. of electronic copies requested (PDF)	<u>1</u>	

Submit the Statements of Qualifications (Form F110-330) via email to [330Submittals@osu.edu](mailto:330Submittals@osu.edu). In the subject line, include the project number and name for the RFQ you are responding to. See Section H of this RFQ for additional submittal instructions.

Submit all questions regarding this RFQ in writing to Kimberly Moss at [moss.58@osu.edu](mailto:moss.58@osu.edu) with the project number and name 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.

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### Project Overview

#### A. Project Description

Stone Lab, The Ohio State University's island campus, conducts operations on two Lake Erie Islands (Gibraltar and South Bass Islands). In its current location since the early 1920s, Stone Lab has been recognized as the research, education, and outreach hub for Lake Erie. Stone Lab leadership reports through the university's Office of Research (OR) and the College of Food, Agricultural, and Environmental Sciences (CFAES). As a university and state asset, it has access to leading scientists and educators across the Great Lakes region enabling the program to share research findings with decision-makers, citizens, business owners, and future leaders.

Program leadership manages Stone Lab's ~20 buildings on ~15 acres across two islands. In addition to buildings the program maintains and operates dock infrastructure and the utilities required to connect the two islands (i.e. electric, water and sewage lines). Lakeside dockage is critical as the program directs its own fleet of research vessels. The above asset portfolio, both facilities and lakefront dockage, allows Stone Lab to respond immediately to historic and emerging Lake Erie issues. Some of these facilities are strictly dedicated to research and education objectives while some are designed to engage interested stakeholder groups (i.e. state and federal legislature, coastal county commissioners and mayors, regional media outlets, charter captains, coastal property owners, watershed residents, and individuals visiting this popular tourism destination). Stone Lab's unique assets provide an amazing opportunity to learn by expanding the classroom from four walls to the entire outdoors.

The Stone Lab Master Plan will recommend a strategic, flexible road map for the Lab's future capital investments. It will not only direct leadership decisions on capital improvements but will serve as a communication resource during stakeholder engagement and fundraising efforts. In addition to meeting the research and education facility needs, the master plan must consider how the island campus is viewed and utilized by nontraditional stakeholders wanting to access research findings and educational opportunities. Further, planning/placement of facilities should promote collaborative growth within The Ohio State University (i.e. multiple colleges, departments, and centers) and outside the university (i.e. regional universities, private industry and both state and federal agencies). Finally, the master plan must include new structures **and** investments in existing infrastructure.

#### B. Scope of Services

A highly qualified, interdisciplinary team will assemble a comprehensive and customized master plan to meet the program's research and formal educational needs while enhancing its informal educational/outreach opportunities. Stone Lab regularly engages researchers, students (K-graduate school), and an informal audience (i.e., lay public) requiring the facilities to have specialty, niche designs.

## Request for Qualifications (Architect / Engineer) continued

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A vision plan will be created that supports the overarching Stone Lab mission and goals for the facilities to support the research, education and outreach needs. This will include a programmatic study and condition assessment of all existing facilities, development and location of new facilities, phasing strategy and conceptual cost estimates for the recommendations.

The A/E team selected to complete the plan will develop the scope of work detail to include the following tasks:

- Convene a series of team meetings and presentations including user groups, stakeholders, university centers, other university colleges and OSU leadership
- Coordinate and confirm consistency with the College of Food Agriculture and Environmental Science (CFAES) Master Plan (currently in progress) and the strategic plan
- Develop a master plan and facility strategy to stabilize and improve all university facilities at Lake Erie
  - Determine current utilization and develop a strategic plan to meet current and future programmatic needs
  - Develop a conceptual space program for all facilities (functions, key adjacencies, square footage space allocations)
  - Formulate recommendations for: research facilities (i.e. research labs, teaching labs, and controlled environments), classrooms, meeting/conference space, event space, dining facility, and housing (i.e. student and family friendly faculty/staff accommodations).
  - Develop a strategy for program expansion and implementation (capital expense, operations/maintenance, staffing)
  - Determine and evaluate potential sites for research and education (“back-of-house” operations) and opportunities for informal outreach programs to highlight our efforts (“front-of-house” operations”).
  - Confirm siting location for additional research space at Peach Point (needed by June 2019)
- Explore alternative uses, visions and economic analysis for potential uses of the South Bass Island Lighthouse and Cooke Castle Residence
- Provide narrative on infrastructure analysis and capacity
- Develop a phasing plan for replacing facilities
- Determine enabling projects needed and create narratives explaining the details of the projects (stormwater, utilities, parking, infrastructure, demolitions, relocations, swing space)
- Develop conceptual plans/images to include building massing diagrams, site plans, and phasing diagrams
- Develop conceptual, master planning level cost estimates and timeline/phasing for implementation
- Provide recommendations for nontraditional funding sources to specifically include but not be limited to potential grants, public-private-partnerships, and smart cities

The selected Consultant, as a portion of its required Scope of Services and prior to submitting its proposals, will discuss and clarify with the Owner and/or Contracting Authority, the cost breakdown of the 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: Master Planning, Facility Condition Assessment, Program Development, Meeting Facilitation, Conceptual Estimating, Phasing and Budgeting, and any Additional Services as agreed upon as provided by the Consultant and their sub-consultants.

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. **Physical master plans** for research, education, housing and dining facilities on an academic campus including siting confirmation, renovations, new construction and phased implementation
2. Research, education, housing and dining **facility programming** in a university setting
3. Research, education, housing and dining **facility utilization assessments** in a university setting
4. **Planning or Design Excellence** as determined by the university and supported by third party endorsement (i.e. design awards)

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## State of Ohio Standard Forms and Documents

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### C. Funding / Estimated Budget

Total Project Cost	<u>\$95,000</u>	State Funding	<u>\$Dollar Amount</u>
		Other Funding	<u>\$95,000</u>

### D. Services Required (see note below)

Primary	<u>Campus Planner</u>
Secondary	<u>Architect</u>
	<u>Landscape Architect</u>
	<u>Cost Estimator</u>
	<u>Civil Engineer</u>
Others	<u></u>

### E. Anticipated Schedule

Planning Services Start	<u>05 / 19</u>
Planning Services Completed	<u>12 / 19</u>

### F. EDGE Participation Goal

Percent of <i>initial</i> TOTAL A/E Fee	<u>5.0%</u>
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### G. Evaluation Criteria for Selection

- Demonstrated ability to meet Owner's 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.
- Proximity of prospective firms to the project site.
- Proposer's apparent resources and capacity to meet the needs of this project.
- Selection Criteria 4b (LEED Registered/Certified consultant participation) will not be scored.

**Pre-interview site visit** to Stone Lab for short-listed firms will occur on **Tuesday, April 16, 2019**.

Interested 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 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 Technical Proposal. Both forms can be accessed via the OFCC website at <http://ofcc.ohio.gov>.

The **EDGE Participation Statement of Intent to Contract and Perform** from Section H. Additional Information must also be submitted. Please identify the EDGE-certified Business Enterprises, by name, which will participate in the delivery of the proposed professional services solicited in the RFQ.

### H. 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>.

**PDF file:** 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.

Firms are requested to identify professional registrations, memberships, 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.

# Planning Services Selection Rating Form

## State of Ohio Standard Forms and Documents

Project Name Stone Lab Master Plan Proposer Firm \_\_\_\_\_  
 Project Number OSU-190493 City, State, Zip \_\_\_\_\_

Selection Criteria		Value	Score
<b>1. Primary Firm Location, Workload and Size (Maximum 15 points)</b>			
a. Proximity of firm to project site	Less than 150 miles	5	
	150 miles to 300 miles	2	
	More than 300 miles	0	
b. Amount of fees awarded by Contracting Authority in previous 24 months	Less than \$200,000	5	
	\$200,000 to \$1,000,000	2	
	More than \$1,000,000	0	
c. Number of relevant professionals	Less than 2 planning professionals	0	Max = 5
	2 to 10 planning professionals	3	
	More than 10 planning professionals	5	
<b>2. Primary Firm Qualifications (Maximum 30 points)</b>			
a. Master planning lead	Experience / ability of lead master planner to manage visioning / capital improvement plans	0 - 10	Max = 20
b. Assessment lead	Experience / ability of lead to manage assessors of various disciplines	0 - 5	
c. Planning staff	Experience / ability of planning staff to develop long range master plans	0 - 10	
d. Technical staff	Experience / ability of assessors to accurately collect data and evaluate systems and components	0 - 5	
<b>3. Sub-Consultant Qualifications (Maximum 10 points)</b>			
a. Key discipline leads	Experience / ability of key consultants to perform effectively and collaboratively	0 - 10	
<b>4. project Team Qualifications (Maximum 15 points)</b>			
a. Previous team collaboration	Less than 2 sample projects (Low)	0	Max = 5
	2 to 4 sample projects (Average)	2	
	More than 4 sample projects (High)	5	
b. LEED* Registered / Certified consultant participation	No projects	0	Max = 5
	Registered	2	
	Certified	5	
d. Team organization	Clarity of responsibility / communication demonstrated by table of organization	0 - 5	
<b>5. Overall Team Experience (Maximum 30 points)</b>			
a. Criteria development and prioritization	Performance in establishing owner criteria for capital improvement plans	0 - 10	
b. Experience with similar planning projects	Less than 3 projects (Low)	0 - 3	
	3 to 6 projects (Average)	4 - 6	
	More than 6 projects (High)	7 - 10	
c. Past Performance	Level of performance as indicated by past evaluations / letters of reference	0 - 10	
* LEED = Leadership in Energy & Environmental Design developed by the U.S. Green Building Council		<b>Subtotal</b>	

Notes:

Evaluator:

Name \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_