

# Request for Qualifications (CM at Risk Contract)

## State of Ohio Standard Forms and Documents

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Project Name	<u>Marion LSD New Building</u>	Response Deadline	<u>Date 2-16-24 Time 10:00 a.m.</u> local time
Project Location	<u>7956 State Route 119</u>	Project Number	<u>N/A</u>
City / County	<u>Maria Stein / Mercer</u>	Project Manager	<u>N/A</u>
Owner	<u>Board of Education</u>		
Delivery Method	<u>CM at-Risk</u>	Prevailing Wages	<u>N/A</u>
No. of paper copies requested (stapled, not bound)	<u>0</u>	No. of electronic copies requested (PDF)	<u>1</u>

Submit the requested number of Statements of Qualifications (Form F110-330) directly to Mike Pohlman, Superintendent at pohlmanm@marionlocal.org. See Section F of this RFQ for additional submittal instructions.

Submit all questions regarding this RFQ in writing to Mike Pohlman, Superintendent at pohlmanm@marionlocal.org. with the project number included in the subject line (no phone calls please). Questions will be answered and posted to the District website at <https://www.marionlocal.org/Default.aspx>, 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

The Board is interested in erecting a new building consisting of nine classrooms, a competitive gym, locker rooms, a cafeteria, an industrial arts & agricultural educational facility, and administrative offices. The new building will be connected to the existing elementary building by a corridor. The new building is to be approximately 64,205 sq. ft. An early-site GMP package is anticipated in the fall of 2024 with another building GMP package anticipated in the spring of 2025.

Professional design services are being acquired by the Owner under a separate contract.

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

All aspects of the project and related issues will be implemented and operated consistent with the Owner and/or Owner's policies and procedures.

#### B. Scope of Services

The selected Construction Manager at Risk ("CM"), as a portion of its required Scope of Services and prior to submitting its proposal, will discuss and clarify with the Owner, the breakdown of the Agreement detailed cost components, to address the Owner's project requirements and refine the project schedule.

As required by the Agreement, and as properly authorized, provide the following categories of services: provide constructability review comments on documents produced by the A/E during the Schematic Design, Design Development, and Construction Document stages; develop and maintain estimates of probable construction cost, value engineering, project schedules, and construction schedules; lead and manage the Subcontractor Prequalification and Bidding process, Construction and Closeout Stage.

The preconstruction and construction services are generally described below. Subcontracts including but not limited to Plumbing, Fire Protection, HVAC, Electrical and AV/Technology will be awarded by the CM to prequalified vendors using a competitive process. The parties will engage in an "open book" pricing method in which all subcontracted work shall be based upon competitive pricing that will be reviewed by the Owner and the A/E. The Owner shall have access to all books, records, documents and other data in the CM's possession related to itself, its subcontractors and material suppliers pertaining to bidding, pricing or performance of the Agreement.

Preconstruction Services: The CM will work cooperatively with the Owner and A/E, and will provide, among other services, schedule development, estimate development, Guaranteed Maximum Price ("GMP") proposal, subcontractor prequalification and bidding, constructability review, permits, budgeting, value engineering, and preconstruction planning throughout the preconstruction stages. When the drawings and specifications are at the stage of

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completion specified in the Agreement, such partially completed documents (the "Basis Documents") shall be provided to the CM, together with the A/E's detailed listing of any incomplete design elements and the A/E's statement of intended scope with respect to such incomplete elements (the "Design Intent Statement"). Contingent upon the Owner's approval of the GMP, the parties will enter into an amendment to the Agreement establishing the Contract Sum ("GMP Amendment"). If the proposed Contract Sum exceeds the Project Budget established for construction, then the Owner may terminate the agreement with the CM and seek proposals from other firms for completion of the Project.

**Construction Services:** The CM shall construct the Project pursuant to the construction documents and in accordance with the schedule requirements. The CM shall hold all subcontracts and shall be fully responsible for the means and methods of construction, project safety, project completion within the schedule agreed upon in the preconstruction phase, compliance with all applicable laws and regulations including, equal employment requirements, and submitting monthly reports of these activities to the Owner. All subcontracts shall be on the subcontract form prescribed by OAC Section 153:1-03-02 (Document 00 52 34). The Owner reserves the right to approve the CM's selection of subcontractors and any supplemental terms to the form subcontract.

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. Project Delivery Method (CMR)
2. Role on Project (CMR)
3. K-12 Education Building Project

### C. Funding / Estimated Budget

Total Project Cost	<u>\$23,313,800</u>	State Funding	<u>N/A</u>
Construction Cost	<u>\$20,049,868</u>	Other Funding	<u>\$3,263,932</u>

### D. Anticipated Schedule

CM Preconstruction Services Start	<u>03 / 2024</u>
Construction Stage Notice to Proceed	<u>09 / 2024</u>
Substantial Completion of all Work	<u>07 / 2026</u>
CM Services Completed	<u>08 / 2026</u>

### E. Evaluation Criteria for Selection

**Selection Criteria:** The CM will be selected using (i) qualifications-based process during the Request for Qualifications ("RFQ") stage to develop a short list and (ii) best value process during the Request for Proposal stage. The qualifications-based criteria for the RFQ is included in this announcement. The best value criteria used in evaluating proposals from short listed firms will include such factors that are determined to derive or offer the greatest value to the Owner, combining both qualifications and fee.

**Short List:** Each firm responding to this RFQ will be evaluated and selected based on its qualifications and the qualifications and experience of the particular individuals identified as the candidate's proposed team for the Project. After evaluating the responses to this RFQ, the Owner will select a short list of no fewer than three candidates that it considers to be the most qualified, except if the Owner determines that fewer than three firms are qualified, it will only select the qualified firms.

**Request for Proposal:** The short-listed firms shall be sent a Request for Proposal ("RFP") that will invite the firms to submit pricing proposals containing their proposed preconstruction stage compensation, construction stage personnel costs, itemized construction stage general conditions costs, construction stage contingency percentage, and construction stage fee percentage. The short-listed candidates will also receive (i) form of Agreement with the Owner containing the contract terms and conditions, (ii) set of the most recent design documents and (iii) proposed Project schedule.

**Pre-Proposal Meeting:** Prior to submitting a response to the RFP, the short-listed firms will be invited to meet individually with the Owner. The purpose of the pre-proposal meeting is to permit the short-listed firms an opportunity to ask the Owner questions in an individual setting to help the firms prepare their responses to the RFP. The Owner will notify each short-listed firm to schedule individual times for the pre-proposal meetings.

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Interview: After submitting responses to the RFP, the short-listed firms will be interviewed by the Owner. The purpose of the interview will be to meet the proposed Project team, become familiar with key personnel, and understand the project approach and ability to meet the stated objectives for the Project. Please be prepared to discuss with specificity the firm's capacity to conduct this work in compliance with the timetable and budget. The Owner will notify each short-listed firm to schedule individual times for the interviews.

Selection Schedule: Tentative schedule is subject to change.

RFP issued to the Short-Listed Firms	Date TBD
Interviews	Date TBD
Selection of CM	Date TBD

Cancellation and Rejection: The Owner reserves the right to reject all proposals and cancel at any time for any reason this solicitation, any portion of this solicitation or any phase of the Project. The Owner shall have no liability to any proposer arising out of such cancellation or rejection. The Owner reserves the right to waive minor variations in the selection process.

Interested CM firms must indicate on their *Statement of Qualifications*, the locations where their services will be performed in the spaces provided or by attachment in accordance with the requirements of Executive Order 2019-12D related to providing services only within the United States and the requirements of Executive Order 2022-02D prohibiting purchases from or investment in any Russian institution or company. Failure to do so may cause their *Statement of Qualifications* to be rejected.

### F. Submittal Instructions

Firms are required to submit the current version of *Statement of Qualifications* (Form F110-330) available via the District website at <https://www.marionlocal.org/Default.aspx>.  *CM Comment: I went to the district's website and I did not see where this form is available online.*

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.

Facsimile copies of the *Statement of Qualifications* will not be accepted.

**Statements of Qualifications must be submitted electronically by email. Submittals are limited to one email with a maximum file size of 25 MB.**

Unless otherwise noted or exempt, all documents submitted to the Owner in response to this RFQ and subsequent RFP are public and will be available for inspection at the conclusion of the selection process. The following information shall remain confidential and will not be released: (1) Proposal Form(s), except for cost category subtotals which will be transferred to the Best Value Rating Form; (2) Financial Capacity; and (3) Bonding/Insurance.

Proposers are requested to submit the following information in response to this RFQ within Section H of Form F110-330.

1. Summary: Provide a summary, on one page or less, describing why your firm/team is the most qualified for the Project.
2. Bonding/Insurance: Provide evidence of capacity to provide bonding in the amount of the construction budget (e.g. a letter from your Surety agent stating that one or more Sureties will issue Bonds in the amount of the construction budget if your team is selected) and a copy of the firm's certificate of insurance showing the firm's current limits of liability for commercial general liability, employer's liability, business automobile liability, and professional liability insurance.
3. Management Systems: Describe the scheduling and cost control systems the firm would propose to use for the Project
4. Self-Performed Work: Indicate whether the firm intends to self-perform any work on the Project through a competitive process and, if so, the nature of the work and capability to self-perform.
5. Estimating: Demonstrated track record of performance of in-house estimating on projects comparable to the Project.
6. Scheduling: Demonstrated track record of performance of managing projects to the original schedule.

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Firms are requested to identify professional registrations, memberships and credentials including but not limited to: CCCA, CCM, CCS, CDT, CPE, DBIA, and any other appropriate design and construction industry credentials. Identify that information on the resume page for individual in Block 22, Section E of the F110-330 form.

# CM at Risk Selection Rating Form

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Project Name Marion LSD New Building  
 Project Number N/A

Proposer Firm \_\_\_\_\_  
 City, State, Zip \_\_\_\_\_

Selection Criteria		Value	Score
<b>1. Primary Firm Location and Workload</b> (Maximum 10 points)			
a. Proximity of firm to project site	Less than 50 miles	5	
	50 miles to 100 miles	2	
	More than 100 miles	0	
<b>2. Primary Qualifications</b> (Maximum 40 points)			
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 10	Max = 30
b. Project administration lead	Experience / ability to effectively administer project controls and processes	0 - jj	
c. Technical staff	Experience / ability of technical staff to develop accurate estimates and schedules	0 - kk	
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - ll	
<b>3. Key Consultant Qualifications</b> (Maximum 10 points)			
a. Key consultants	Experience / ability of key consultants to perform effectively and collaboratively	0 - 10	
<b>4. Overall Team Qualifications</b> (Maximum 10 points)			
a. Previous team collaboration	Less than 2 sample projects	1	Max = 3
	2 to 6 sample projects	2	
	More than 6 sample projects	3	
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	
<b>5. Overall Team Experience</b> (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 2 projects	0 - 3	
	2 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	
		<b>Subtotal</b>	

Notes:

Evaluator:

Name \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_