

**INDIAN HILL EXEMPTED VILLAGE SCHOOL DISTRICT
REQUEST FOR QUALIFICATIONS FOR
CONSTRUCTION MANAGER AT RISK SERVICES
Dated January 13, 2021**

Project Owner: Indian Hill Exempted Village School District Board of Education

Project Name: Capital Improvements Project

Project Location: Various

Delivery Method: Construction Manager at Risk, in accordance with the Ohio Revised Code

Deadline to Submit Qualifications: 3:00 p.m. local time, **February 12, 2021**

Introduction:

The Indian Hill Exempted Village School District (the Owner) intends to contract for Construction Manager at Risk (CMR) services in connection with its Capital Improvements Project (the Project).

As required by Ohio Revised Code Section 9.33, et seq., the Owner requests statements of qualifications from experienced firms to provide CMR services to the Owner in connection with the Work for the Project. This Request for Qualifications (RFQ) includes criteria against which qualifications submitted will be reviewed and evaluated to develop the short-list of firms from which proposals will be requested in the second phase of the selection process. The short-listed firms will be asked to provide both pricing and technical proposals, which will be reviewed and evaluated to determine the firm that will provide the best value to the Owner for the Project.

Submittals:

Interested individuals or firms must submit **1 electronic copy in PDF format** of the SOQ's directly to Mick Davis, Treasurer at. Place your firm's name followed by "Statement of Qualifications for Construction Manager Services" in the subject line.

Electronic submittals should be combined into one PDF file named with the project name 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.

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

The Owner reserves the right to waive any defect or technicality in any SOQ received or to eliminate any firm that submits an incomplete or inadequate SOQ or that is not responsive to the requirements of this RFQ.

Communication Protocol:

All questions concerning this RFQ shall be directed in writing via email to Mick Davis, Treasurer at by **5pm 10 calendar days prior to the submittal deadline**. Questions will be reviewed and the Owner will determine whether any addenda should be issued as a result of any pertinent or substantive inquiries. Addenda will be issued to all firms that have requested the RFQ for the Project. Firms shall not rely on any oral instructions or answers. Respondents should not seek to discuss any information directly relating to this procurement with any Owner personnel or anyone affiliated with the Project, except during scheduled site visits, or as otherwise provided for in the RFQ. Violation of this provision may result in disqualification from eligibility for selection.

Project Overview, Schedule, and Owner Budget:

- A.** This Project is anticipated to include:
- a. Renovation of the Indian Hill Primary School. The project will include site improvements to the parking, access drives, and outdoor play spaces as well as renovations and additions to the main entries, front offices, cafeteria and kitchen, multi-purpose room, auditorium, common areas, and other related components. There will also be improvements to the building systems and existing infrastructure, including HVAC, electrical, plumbing, and life safety.
 - b. Renovation and expansion of the Indian Hill Elementary School. The project will include site improvements to the parking, access drives, and outdoor play spaces as well as improvements to the main entry and replacement of a portion of the building. The new addition will include music and art classrooms, commons areas, and a multi-purpose Gymnasium and Auditorium. There will also be improvements to the building systems and existing infrastructure, including HVAC, electrical, plumbing, and life safety.
 - c. Replacement of the Indian Hill Middle School. The project will include a new Middle School building along with related site improvements and amenities. The existing Middle School Gymnasium will be maintained with minor modifications.
 - d. Renovation of the Indian Hill High School. The project will include site improvements to the parking, access drives, and outdoor spaces as well as improvements to the performing arts and indoor athletic spaces. There will also be improvements to the building systems and existing infrastructure, including HVAC, electrical, plumbing, and life safety.
- B.** Reference Documents, titled Indian Hill School District Facility Master Plans, dated February 2020, are attached as **Exhibit A**. Such document(s) are for reference only. The Owner neither makes any representation nor warranty with respect to, nor assumes any responsibility for the completeness or the accuracy of, such document(s). Respondents must not rely upon the completeness of such document(s) for their purposes.
- C.** The Owner's estimated total budget for the Project (including all construction costs, design fees, and construction manager at risk fees) is **\$77 Million**.
- D.** The Owner anticipates commencement of pre-construction services immediately.
- E.** Design Professional services are being procured separately, per the Ohio Revised Code.

Scope of Services:

CMR services for the Project will include, but not be limited to, design review and pre-construction services, participation in developing the budget and updated construction cost estimates, participation in preparing the construction schedule (including identification of significant milestones for completion of the Work), prequalification of subcontractors to perform the required Work, construction, and close-out phases of the Project. CMR services will be defined in an agreement with the Owner; the form of agreement, including general conditions of the contract for construction, will be provided to the short-listed firms during the RFP phase. The scope of the selected firm's services will likely include, but may not be limited to, the following:

A. Pre-Construction Services

1. Participate in regularly-scheduled design progress meetings with the Design Professional, the various consultants, and the Owner. The CMR shall provide ongoing input with respect to constructability, construction costs, material selection/evaluations, construction duration and phasing, sequence of construction, and other scheduling services, along with construction means and methods.
2. Coordinate/participate in meetings with the Owner and Design Professional, utility companies, and regulatory agencies to expedite the design/permit process.
3. Identify and detail construction phasing and scheduling that will minimize interruptions to Owner operations, if applicable.
4. Facilitate long-lead procurement studies and initiate procurement of long-lead items.
5. Develop comments, suggestions and cost estimates throughout the phases of design.
6. Develop constructability and value engineering suggestions at all design phases – considering different design/material/life cycle elements.
7. Permit Acquisition/Approval.
8. Develop prequalification criteria for subcontractors and prequalify subcontractors for the Work, in accordance with Ohio law.
9. Develop potential subcontractor bidders' lists.
10. Develop a detailed, open book cost model and updates based on interim submittals for the Guaranteed Maximum Price (GMP) proposal based on the nearly complete Construction Documents.

B. Construction Services

1. Coordinate with the Owner, the Design Professional, and other stakeholders as necessary.
2. Bond and insure the construction per Ohio law and the Contract Documents.
3. Arrange for procurement of materials.
4. Schedule and manage construction operations.
5. Bid, award (with Owner input, per Ohio law), and manage all construction-related subcontracts.
6. Provide quality control and construction supervision.
7. Progress Scheduling/compliance with Schedule.
8. Regular progress meetings.
9. Address all construction related permitting requirements.

10. Maintain safe work site.
11. Project closeout including documentation (final wage reports, lien releases, O&M manuals, as-builts, etc.)

C. Post-Construction Services

1. Warranty obligations.
2. Other post-construction services.

Procurement Process:

As defined in the Ohio Revised Code and Ohio Administrative Code, the selection process will be conducted in two phases.

1. RFQ. The first phase includes review and evaluation of qualifications submitted by firms interested in providing the required CMR services by the Owner’s Evaluation Committee, in accordance with Ohio law. The Evaluation Committee will review and evaluate the qualifications received. A minimum of three short-listed firms that are determined to be qualified to provide the required CMR services will be identified, unless it is determined that there are less than three qualified firms.
2. RFP. Technical and pricing proposals will be requested from the short-listed firms, using a request for proposals. The technical and pricing proposals received will be reviewed and evaluated and, considering both qualifications and technical/pricing information, the firm determined to provide the best value for the Project will be selected.

Pre-Submittal Site Visit:

During the RFQ phase, Respondents may visit the site, after submitting a written request that is approved in advance. Such written request must be made by email to Mick Davis at. Visits will only be allowed from the general public’s perspective. The Owner reserves the right to have a representative present.

Anticipated Procurement Schedule:

RFQ PHASE	DATE
Short-List of Qualified Firms Announced	February 18, 2021
RFP PHASE	DATE
Request for Pricing and Technical Proposals issued to Short-Listed Firms	February 19, 2021
Optional Pre-Proposal Submission Meeting(s)	February 25, 2021
Deadline for Submitting Pricing and Technical Proposals	March 5, 2021

Interviews	Week of March 8, 2021
Selection of "Best Value" Proposal	March 2021

All dates subject to change in Owner's sole discretion.

Rights of the Owner:

This RFQ constitutes only an invitation to present qualifications. The rights reserved by the Owner, which shall be exercised in its sole and absolute discretion, include without limitation the right to:

1. Require additional information from one or more Respondents to supplement or clarify the SOQs submitted including, but not limited to, conducting interviews with Respondents if Owner, in Owner's sole discretion, deems such interviews to be helpful.
2. Conduct investigations with respect to the qualifications and experience of each Respondent.
3. Visit and examine any of the facilities referenced in the SOQs and to observe and inspect the operations at such facilities.
4. Waive any defect or technicality in any SOQ received.
5. Determine which Respondents are qualified to be short-listed to receive the RFP and submit Proposals in response to the RFP.
6. Eliminate any Respondent that submits an incomplete or inadequate SOQ or is not responsive to the requirements of this RFQ.
7. Supplement, amend, or otherwise modify this RFQ, prior to the date of submission of the SOQs.
8. Issue one or more amendments to this RFQ extending the due date for the SOQs.
9. Receive questions concerning this RFQ from Respondents and to provide such questions, and the Owner's responses, to all Respondents.
10. Cancel this RFQ or the RFP in whole or in part with or without substitution of another RFQ or RFP if determined to be in the best interest of the Owner.
11. Take any action affecting the RFQ process, the RFP process, or the Project that would be in the best interest of the Owner.
12. Make public any and all documents associated with the Project, including documents submitted to the Owner by Respondents.
13. The Owner only intends to award the contract for Preconstruction Services at this time. The Owner reserves the right to allow other pre-screened Construction Management Contractors to submit for consideration for Construction Phase Construction Management Services.

SOQ Required Format and Information:

A. SOQ Format

The format of the SOQ must be as outlined below. Narrative pages are to be 8-1/2 inches by 11 inches. All information provided shall be bound into a single volume. A clear and concise presentation of information is encouraged with a maximum page limit of 50 single-sided pages (or 25 double-sided pages), not including resumes of key staff, standard brochures, and financial information and supporting data. Audiovisual materials will not be accepted. Sales brochures are not desired unless directly related to the response and referenced in the text. Below is additional information about the submission requirements to this RFQ.

Only those persons or firms who have obtained an official copy of this RFQ from the Owner will receive any official addenda to this RFQ. Receipt of all addenda shall be acknowledged by Respondents in a transmittal letter with the SOQ.

B. SOQ Required Information

Provide the following information for consideration by the Owner as part of the evaluation of Respondent's qualifications. The SOQ must be separated into tabbed sections as follows:

1. **Competence and Services.** When providing the following information, if the firm is a national firm with a branch office in Ohio, provide information limited to the firm's Ohio office projects and experience.
 - a. Provide a summary of the firm's history and philosophy. What is the firm's approach to the CMR delivery method? What is it that makes the firm unique? How long has the firm been in business, and how long have key employees and principals been associated with the firm?
 - b. Identify the CMR team (the firm's proposed employees who would be assigned to perform services for the Project) including key consultants, if any.
 - c. Describe the proposed CMR team in more detail – i.e., credentials, technical training, experience with BIM, education, and experience of the CMR team, in-house, full-time employees and in-house professional disciplines. Provide bios for Project Executive/Project Manager, Project Administrator (Site Level), and Construction Technical Staff (Estimating, Budgeting, Scheduling) only. Include consultants to be used for the Project and the firm's experience with each on past projects. Limit bios to one page in length.
2. **Ability to Provide the Required Services.**
 - a. What is the capacity of the firm and members of the CMR team to provide the required services for the Project in terms of workload and availability? Include a list of current projects and the status of each and relevant information (i.e., budget, type of work, stage of completion, committed staff, and consultants).
 - b. Identify the firm's and CMR team members' representative project experience and CMR delivery method on similar projects, with an emphasis on public projects in the State of Ohio:

- (1) List the firm's relevant projects within recent history with an emphasis on Ohio K-12 school facility experience and other projects of any type that are similar in size or budget, if any. Include a brief description of the project, including size of project (e.g., square footage) and project delivery model (e.g., general contractor, construction manager at risk, design-build, etc.). Describe experience with use of space, technology, and systems that support K-12 facility functions.
 - (2) Identify projects on which a significant number of the individual team members have collaborated previously.
- c. Proximity of the firm's primary office where the majority of the Project work will be managed/performed to the Project site – List distance in miles, straight-line method.

3. Past Performance.

- a. Budget management success by firm on projects with similar construction costs for which original estimates/pricing were prepared by the firm. Show comparison of original estimates versus actual final construction costs and variance in percentage only, up to 10 projects may be listed.
- b. Schedule management success by the firm on projects with similar construction costs for which actual completion dates were significantly shortened versus original contracted completion date or original completion dates were held despite a challenging, unexpected schedule issue that occurred. List a brief summary for each of the circumstances, up to 5 projects may be listed.
- c. References for the firm with an emphasis on Ohio public K-12 school facility experience providing:
 - (1) Project name, location, completion year
 - (2) Project owner, owner contact name, owner contact phone number/email
 - (3) Design Professional and Owner's Representative, if any
 - (4) Brief description of the project and its relevance to this RFQ – include construction budget, project size (e.g., square footage), and project delivery model (e.g., general contractor, construction manager at risk, design-build, etc.)
 - (5) Individual team members associated with project and their role on the project
 - (6) Construction budget, change order amounts, and actual construction cost
 - (7) Quality of Work performed
 - (8) Dispute Resolution (dealing with subcontractor and supplier issues)
 - (9) Administration of subcontractors and suppliers

- (10) The initial scheduled completion date and the actual date services were completed or the current anticipated completion date
4. **Financial Responsibility.** Demonstrate firm's bonding capacity as evidenced by a recently dated letter from the firm's surety agent listing current available bonding capacity, as well as total maximum bonding capacity. The letter should also state the surety agent's commitment to provide the required payment and performance bonds in accordance with OAC 153:1-4-02, if the firm is determined to be the firm that will provide the best value for the Project.
5. **History of Performance with goals of diversity and inclusion.** Describe the firm's history of performance with goals of diversity and inclusion. Identify all projects where the firm has been denied a contract for failure to meet goals for Disadvantaged Business Enterprise ("DBE") or other diversity and inclusion participation or to demonstrate good faith compliance towards meeting DBE goals.
6. **Other qualifications consistent with the scope and needs for the Project.**
 - a. **Firm's Average Revenue.**
 - (1) Firm's annual revenue associated with similar construction projects for the past 7 years.
 - (2) Firm's total annual revenue for each of the past 7 years.
 - b. **Insurance Coverage & Claims History.**
 - (1) Professional Liability coverage of the firm, including claims history for the last 10 years.
 - (2) Commercial General Liability coverage of the firm, including claims history for the last 10 years.
 - (3) Specific information about any claims asserted by or against the firm within the last 10 years, including the resolution of the claim(s).
 - (4) Claims asserted against the firm's performance or payment bond(s) on other projects within the last 10 years, including the resolution of the claim(s).
 - c. **Value Added Experience.** Demonstrate the firm's/team's past success in providing past construction manager at risk projects with value added components thru the firm's/team's creative or innovative value engineering, construction technique or other similar methods. For each example, provide a brief one paragraph summary. Include recommendations that enhanced the cost effectiveness and functionality of similar facilities.
 - d. **Prior Performance with the Owner.** Has the firm or any of CMR team ever worked on Projects for the Owner in the past? Was the relationship successful?
 - e. **Familiarity with Local Area.** Knowledge of the local area and working relationships with local subcontractors and suppliers.

SOQ Evaluation Process:

The Owner's Evaluation Committee will review the qualifications received and will notify firms if they are included on the short-list of qualified firms.

A. Conformance Review

Respondent shall be considered responsive if the SOQ responds to the RFQ in all material respects and contains no irregularities or deviations from the RFQ. Each Respondent that is rejected as nonresponsive will be notified of the finding that it was nonresponsive and the reasons for the finding in writing.

B. Qualifications Criteria

The qualifications criteria which may be the basis for evaluation of submitted SOQs are:

1. Competence to perform the required management services as indicated by the technical training, education, and general experience of the CMR's personnel, especially the technical training, education, and experience of the CMR's employees and consultants who will be assigned to the Project;
2. Ability in terms of workload and the availability of qualified personnel, equipment, and facilities to perform the required services competently and expeditiously, and experience working on similar types of projects (specifically experience with Ohio K-12 school facility construction projects);
3. Past performance of the firm as reflected by the evaluation of previous clients with respect to factors such as control of costs, quality of work, dispute resolution, administration of subcontracts, meeting deadlines;
4. Financial responsibility including evidence of the capability to provide the payment and performance bonds in accordance with OAC 153:1-4-02;
5. History of performance with meeting goals of diversity and inclusion programs required by a public authority or by applicable law, and compliance with applicable affirmative action programs. For public improvement projects subject to section 9.47 of the Revised Code, a valid certificate of compliance shall be submitted; and
6. Other qualifications that are consistent with the scope and needs of the Project, including, but not limited to:
 - a. Average revenue
 - b. Insurance and claims history
 - c. Value added experience
 - d. Prior performance with the Owner
 - e. Knowledge of the local area and working relationships with local subcontractors and suppliers

Additional Instructions:

All SOQs and subsequent Proposals received in response to the procurement documents will become the property of the Owner and will not be returned. Note that all information submitted in

response to this RFQ and to any subsequent RFP for CMR services is a public record, which will be made available for inspection as required by ORC 149.43 upon request at the conclusion of the selection process. Respondents recognize and agree that the Owner will not be responsible or liable in any way for any losses that the Respondent may suffer from the disclosure of information or materials to third parties.

Each CMR firm submitting qualifications or any other information as part of this selection process is responsible for all costs associated with preparing the submission and participating in the selection process.

The Owner may reject any or all qualification statements received or cancel this process at any time for any reason and the Owner will have no liability for taking such action. The Owner reserves the right to waive minor variations in the selection process.

The Owner appreciates your interest in the Project and looks forward to reviewing your qualifications for the Project.

Attachments:

Exhibit A - Indian Hill School District Facility Master Plans, dated February 2020