**REQUEST FOR QUALIFICATIONS FOR**
**CONSTRUCTION MANAGER-AT-RISK SERVICES ("RFQ")**

December 27, 2023

## 1. INTRODUCTION

The Board of Education of the Lakewood City School District, Ohio ("Owner"), in accordance with Ohio Revised Code Sections 9.33 through 9.335 and Ohio Administrative Code 153:1, is seeking statements of qualifications from firms to provide construction manager-at-risk services for (1) the transition of the Franklin School of Opportunity from its current location at 13465 Franklin Boulevard, Lakewood, Ohio, to Lakewood High School at 14100 Franklin Boulevard, Lakewood, Ohio, (2) renovations and additions at Lakewood High School for the West Shore Career Technical District (which is supported with Career Technical Construction Program grant funding from the Ohio Facilities Construction Commission), and (3) such additional and reasonably related improvements as may be deemed necessary by the Owner (the "Project").

If your firm is interested in being considered, please respond by submitting your statement of qualifications as instructed in Part 5 of this RFQ.

## 2. PROJECT DELIVERY/SERVICES

The Project will be constructed using the "construction manager-at-risk" project delivery format generally described below. The Owner is in the process of selecting a professional design firm to provide professional design services for the Project (the "Professional Design firm"). The Professional Design Firm will develop the requirements for the Project.

The Pre-construction and Construction Phase Services of the construction manager-at-risk ("Construction Manager") are generally described below and shall be set forth in more detail in the agreement between the Owner and Construction Manager to be issued to the short-listed firms during the Request For Proposals Phase (See Part 3.B of this RFQ).

A. Pre-Construction Phase Services. The Construction Manager will work cooperatively with the Owner, Professional Design Firm and any other consultants to the Project that may be retained by the Owner, and Construction Manager will provide, among other services, cost estimating, budgeting, value engineering, constructability review, Guaranteed Maximum Price ("GMP") proposal, permits, scheduling and pre-construction planning throughout the Pre-Construction Phase (including the schematic design, design development and construction documents phases).

B. Construction Phase Services. The Construction Manager shall construct the Project pursuant to the construction documents and in accordance with the Owner's schedule requirements under a Guaranteed Maximum Price. Selection of subcontractors shall be based on competitive pricing submitted by prequalified subcontractors in accordance with criteria approved by the Owner and in accordance with the requirements of Ohio Revised Code 153.502 and Ohio Administrative Code 153:1-7-01. The Construction Manager shall hold all subcontracts and shall be fully responsible for the means and methods of construction, Project safety, and Project completion within the agreed-upon schedule for the Project.

## 3. INTERVIEWS AND SELECTION

The Construction Manager shall be selected using (i) a qualification-based selection process during this initial RFQ phase to develop a short list of construction management firms, and then (ii) a subsequent competitive "best value" selection process during the Request for Proposals ("RFP") Phase for the final Construction Manager selection from among the short-listed firms.

A. Request for Qualifications ("RFQ") Phase/Short-Listing of Firms. Each firm responding to this RFQ by submitting a statement of qualifications will be evaluated based on its qualifications and the qualifications and experience of the particular individuals identified as the firm's proposed team for the Project. Qualifications include competence to perform the required construction management services; ability to manage the required workload and provide qualified personnel, equipment, and facilities; past performance as reflected by the evaluation of previous clients with respect to factors such as control of costs, quality of work, and meeting deadlines; financial responsibility as evidenced by the capability to provide a performance bond and payment bond equal to one hundred per cent of the contract sum; and other similar factors. The Owner may hold discussions with individual firms to explore further their qualifications, the scope and nature of the services they would provide, and the various technical approaches they may take regarding the Project, or alternatively, the Owner, at its sole option, may evaluate the qualification of the firms based solely on the statements of qualifications that are submitted. After evaluating the responses to this RFQ, Owner will select a short list of no fewer than three firms that the Owner considers to be the most qualified to perform the services for the Project or for a component of the Project, except if Owner determines that fewer than three firms are qualified, it will only select the qualified firms. The Owner reserves the right to short-list firms for components of the Project rather than the entire Project in any manner the Owner deems appropriate. The actual ranking of the short-listed firms will take place during the RFP stage.

B. Request for Pricing and Technical Proposals ("RFP") Phase/Selection of Construction Manager. Following the conclusion of this RFQ Phase, the Owner will issue a Request for Proposals ("RFP") to the short listed firms that will invite the short-listed firms to submit technical and pricing proposals containing the firm's proposed technical approach to the Project, the proposed preconstruction stage compensation (fee, personnel costs and reimbursable expenses), and components of the proposed construction stage compensation (personnel costs, general conditions costs, contingency percentage and fee percentage). The short-listed firms will also receive (i) a description of the Project, including the most recent design detail; (ii) a description of the timing and methodology of how the Guaranteed Maximum Price ("GMP"), under an open book pricing method, shall be determined, including the estimated level of design detail upon which the GMP shall be based (although the Owner reserves the right to solicit an up-front GMP for all or a portion of the Project at the time the technical and pricing proposals are submitted); (iii) the form of the Owner/Construction Manager Agreement (which shall be a form permitted by Ohio Administrative Code 153:1-2-01, but shall include Owner and Project-specific terms and conditions); (iv) a proposed Project schedule; and (v) such additional information as deemed pertinent by the Owner. The following is a description of the general process that is expected following the issuance of the RFP:

i. Pre-Proposal Meeting. Prior to submitting a proposal in response to the RFP, the short-listed firms may, at the Owner's option, be invited to meet individually or jointly with the Owner as determined by the Owner. The purpose of the pre-proposal meeting is to permit the short-listed firms to ask the Owner questions to help the firms prepare their responses to the RFP and to tour the Project site.

ii. Interview with CMR Firms/Post-Proposal Meeting. After submitting a proposal in response to the RFP, the short-listed firms will be interviewed by the Owner. The purpose of the interview will be to discuss the Construction Manager's proposal, meet the Construction Manager's proposed Project team, become familiar with key personnel, understand the Project approach and ability to meet the Owner's stated objectives for the Project, and discuss with specificity the firm's capacity to perform the work in compliance with the Owner's timetable and budget. The Owner, in its discretion, may conduct additional post-proposal interviews as the Owner deems necessary.

iii. Selection of the Construction Manager and Negotiation of the Owner/Construction Manager Agreement. After the interviews are conducted, the Owner shall negotiate the Owner/Construction Manager Agreement with the firm whose proposal the Owner determines to be the best value. Contract negotiations shall be directed toward: (i) ensuring that the Construction Manager and Owner mutually understand the essential requirements involved in providing the required services, including the provisions for the use of contingency funds and the possible distribution of savings in the final costs of the Project; (ii) ensuring that the Construction Manager will be able to provide the necessary personnel, equipment, and facilities to perform the services within the required timeline; and (iii) agreeing upon a procedure and schedule for determining the GMP (unless a GMP is solicited simultaneously with the proposals).

C. Selection Schedule. Owner's schedule for selection of the Construction Manager is as follows (however, the selection schedule may be changed at the Owner's sole discretion and at any time prior to and subsequent to the deadline for submitting a statement of qualifications):

RFQ Stage:

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| January 19, 2024 | Deadline for Submitting Questions regarding this RFQ |
| January 26, 2024 | Deadline for Submitting Statements of Qualifications |
| February 2, 2024 | Short-Listing of Firms |

RFP Stage:

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| February 6, 2024 | RFP Issued to Short-listed Firms |
| TBD | Pre-Proposal Meetings with Short-listed Firms |
| TBD | Deadline for Submitting Questions regarding the RFP |

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| TBD | Deadline for Owner Response to Questions regarding the RFP |
| TBD | Deadline for Submitting Proposals in Response to the RFP |
| TBD | Interviews with CMR Firms |
| TBD | Owner Selection of Firm |

## 4. REQUESTED SUBMISSIONS

Firms are requested to submit the following information when submitting a statement of qualifications in response to this RFQ:

A. Cover Letter. Cover letter must include: (a) name, address and phone number of the office where the personnel assigned to the Project will be based, and (b) name, title and phone number of the principal contact person.

B. Firm Profile. The firm profile must include: (a) years of existence; (b) legal form of firm, (c) location of home office; and (d) general firm history. If the proposed form of entity is a joint venture, please identify each venturer and their respective percentage of participation. Provide a summary, on three pages or less, describing why your firm/team is the most qualified for the Project.

C. Bonding/Insurance. Provide evidence of capacity to provide bonding 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, umbrella and professional liability.

D. Similar Experience. Relevant projects of similar nature. Include: (a) description of the project and the services your firm provided for the project; (b) start and completion dates for each project; and (c) name, title and telephone number of the client contact most familiar with your services on the project.

E. Personnel/Staffing. Provide an organizational chart containing the names and titles of the proposed staff for the Project. At a minimum, the chart should include at least three (3) officers or senior employees (e.g., Project Executive, Principal-in-Charge, Project Manager, Project Superintendent or similar designation) who will be available for work on the Project. For every person listed on the chart, provide a one-page resume highlighting relevant experience and identify the phase(s) of the Project to which the individual will be assigned and the percentage of that individual's time to be devoted to the Project.

F. Management Systems. Describe the record keeping, reporting, monitoring and other information management systems that the firm would propose to use for the Project. Describe the scheduling and cost control systems the firm would propose to use for the Project.

G. Self-Performed Work. Indicate whether the firm intends to self-perform any work on the Project through an acceptable competitive process and, if so, the nature of the work and capability to self-perform.

H. Estimating & Value Engineering. Demonstrated capability of in-house estimating on projects and value engineering comparable to the Project.

I. Scheduling. Demonstrated track record of performance of managing projects to the original schedule

J. Safety Programs. Describe the firm's in-house safety program.

K. Employee Screening/Security Programs. Describe any employee workplace screening programs.

L. Prior Defaults. Complete listing of any public or private construction projects for which the firm has been declared in default.

M. Legal Compliance. The firm's history of compliance with federal, state and local laws, rules and regulations, and any EPA, OSHA or other regulating entity issues or citations in the last ten (10) years.

N. Liquidated Damages. Describe the firm's willingness to accept liquidated damages and experience with such provisions on other similar projects.

O. Prior Construction Management-at-Risk Experience. Describe any prior experience with the Construction Management-at-Risk/GMP delivery method.

P. Sustainability. Describe the firm's experience related to sustainability initiatives. Include pertinent details of past projects where your firm successfully implemented sustainable practices in demolition and construction waste management; energy savings during demolition, construction or renovation projects; and energy conservation measures during similar past projects.

Q. Local Experience. Describe the firm's experience with the governmental and quasi-governmental entities that will have jurisdiction over the Project and the requirements of those entities.

R. Coordinating Bidding with Guaranteed Maximum Price (GMP) Packages. Describe the firm's experiences with coordinating the subcontractor selection process with the process for establishing a GMP

S. Building Information Modeling (BIM). Describe the firm's experience with BIM, the level of training and understanding of staff related to BIM, and the firm's recommendation on how BIM should be implemented on the Project.

## 5. INSTRUCTIONS FOR SUBMISSIONS

A. Submission/Response Deadline. By not later than 4:00 p.m. on the Deadline for Submitting Statements of Qualifications as set forth in the Selection Schedule of 3.C herein, one electronic copy of the firm's statement of qualifications must be submitted by e-mail to:

Kent R. Zeman, CFO/Treasurer
Lakewood City School District
Email: kent.zeman@lakewoodcityschools.org

The subject line of the e-mail should clearly read "Statement of Qualifications for Construction Management Services". Statements of Qualifications received after the Deadline for Submitting Statements of Qualifications will not be considered.

B. Questions; Inquiries. By not later than 4:00 p.m. on the Deadline for Submitting Questions regarding this RFQ as set forth in the Selection Schedule of 3.C herein, questions regarding this RFQ must be directed by e-mail to:

Kent R. Zeman, CFO/Treasurer
Lakewood City School District
Email: kent.zeman@lakewoodcityschools.org

The subject line of the e-mail should clearly read "Request for Qualifications for Construction Management Services". No phone calls.

C. Updates and Amendments to RFQ. Updates to this RFQ, including answers to any questions, shall be in writing and shall be posted by addendum on the Owner's webpage at:

https://www.lakewoodcityschools.org

The Owner will also endeavor to notify firms who are on record with Owner as having received a copy of this Request for Qualifications when an update has been posted to the Owner's webpage. It is therefore imperative that firms provide full and accurate contact information to the Owner, including e-mail addresses, and updates will be deemed to have been validly given if emailed or otherwise furnished to each firm's contact person of record. Notwithstanding the foregoing, all firms will be presumed to have actual knowledge of all information and updates posted on Owner's webpage relating to this Request for Qualifications, and firms shall not avail themselves of incomplete knowledge and/or lack of familiarity of this Request for Qualifications and any updates thereto resulting from the firm's failure to register with and provide accurate contact information to Owner and/or a firm's failure to check the Owner's webpage. Interpretations, corrections and changes of the Request for Qualifications which are made in any manner other than an addendum will not be binding. The name of the party submitting questions will not be identified in the answers.

D. Communications. Firms considering responding to this RFQ are strictly prohibited from communicating with any member of Owner's staff other than as directed in Part 5.B herein, as all questions must be directed to the person and in the manner identified in Part 5.B.

E. Public Records. All documents submitted to Owner in response to this RFQ are public and will be available for inspection as set forth under ORC 149.43 and Ohio Administrative Code 153:1-6-01. The following information shall, to the extent included with the statement of qualifications, remain confidential except under proper order of a court: (1) surety letters showing bonding capacity, (2) insurance certificates and policies, and (3) financial capacity.

F. Cancellation; Rejection. Owner reserves the right at any and all times to reject all statements of qualifications, to cancel this RFQ or any portion of this RFQ, to cancel any phase of the Project, or to pursue a different construction delivery method. Owner shall have no liability to

any firm arising out of such cancellation or rejection. Owner reserves the right to waive minor variations in the selection process.

G. Preparation Costs. Owner assumes no responsibility for costs incurred in the preparation, presentation or submission of the statements of qualifications.

H. Amendments to RFQ. At its discretion, the Owner may amend this RFQ at any time prior to the deadline for receipt of statements of qualifications and to distribute the amendments in any medium as determined by the Owner.