Request for Qualifications

Department of Administrative Services
General Services Division ▪ State Architect's Office
4200 Surface Road ▪ Columbus, Ohio 43228

Capital Improvements
http://ci.oaks.ohio.gov
v: 614.466.4761 ▪ f: 614.644.7982

Project Name	Energy and Commissioning Consultant List	Response Deadline	02/17/2011 5:00 p.m. local time
Project Location	Various	Project Number	DAS-11N777
City / County	Various / Various	SAO Project Manager	Various
Agency/Institution	Various	Contracting Authority	State Architect's Office
No. of Paper Copies (stapled, not bound)	0	No. of Electronic Copies on CD (PDF)	1

Mail or deliver the requested number of Statements of Qualifications (SAO Form F110-330) directly to the State Architect's Office (Attention: Program Services) at the address above. Submit all questions regarding this RFQ in writing to StateArchOff@das.state.oh.us with the project number included in the subject line. See Section H for additional submittal instructions.

Project Overview

A. Project Description

The State Architect's Office (SAO) intends to pre-qualify firms to provide energy and commissioning services for projects that are not advertised through the Ohio Register. In order for any firm on the FY10-FY11 list to be considered in the pre-qualification process for future projects, they must reapply.

This pre-qualification process will determine the list of firms that will be eligible for award of contracts for the period beginning July 1, 2011 and ending June 30, 2013. The current Consultant List expires on June 30, 2011.

Services are in support of the SAO design and management of projects, as well as to support state agency administration of projects. Consultants are generally utilized for small projects or specialized tasks in which the usual Ohio Register selection process would be cumbersome. All firms submitting a proposal in response to this RFQ will be eligible for consulting services opportunities.

Upon completion of the selection process, SAO will seek Controlling Board approval for total contract awards to each pre-qualified firm up to the amount of $250,000 for the two-year period. Fees for each individual assignment will usually range in the amount of $25,000 - $75,000 per project. However, there may be exceptions where fees for an individual assignment will exceed $75,000.

The number of pre-qualified energy and commissioning consultants selected through this process is within the discretion of SAO. While pre-qualified status means that a firm is eligible for award of contracts, SAO does not guarantee that a firm will be awarded any work or make a representation of the amount of work a firm may receive within the two-year period.

B. Scope of Services

Work assignments may include:

- Energy auditing services
- Energy conservation design
- Commissioning/Retro-commissioning
- Lighting consulting
- Maintenance planning
- Manual and document preparation
- Assist with performance contract RFP development
- Assist with utility bill data entry, analysis, management, auditing and reporting services

Services will be provided in accordance with a standard form of consultant agreement. As a project is identified for energy and commissioning services, SAO will notify a pre-qualified firm or firms of the project and provide a scope of work. Only the firm selected for an assignment will be requested to provide a fee proposal. The scope of work and schedule for a specific project will be described in an exhibit document attached to the agreement.

SAO will initiate contract negotiations directed toward:

(1) Ensuring that the firm and the agency have a mutual understanding of the essential requirements involved in providing the required services;

(2) Determining that the firm will make available the necessary personnel, equipment, and facilities to perform the services within the required time; and

(3) Agreeing upon fair and reasonable compensation, taking into account the estimated value, scope, complexity, and nature of the services.

Upon failure to negotiate a contract with an identified pre-qualified firm, SAO will inform the firm in writing of the termination of negotiations and enter into negotiations with another firm on the pre-qualified list.

C. Funding / Estimated Budget

Total Project Cost	Varies	State Funding	Varies
Construction Cost	Varies	Other Funding	Varies
Estimated Design Fee	Varies		

NOTE: The design fee percentage for this project includes all professional design services, and any necessary reimbursable expenses and allowances necessary for proper completion of the Basic Services for the successful completion of the project, including but not limited to: review and verification of the scope of services provided by the Owner, validation of existing site conditions (but not subsurface or hidden conditions), preparation of cost estimates and design schedules for the project. Reimbursable expenses and allowances may be negotiated and allocated for Additional Services (e.g., creation of a Program of Requirements, extensive evaluation or validation of site conditions, extensive pre-design investigations, code-required special inspection and testing, Quality Assurance testing during the construction period, and testing due to unforeseen conditions).

D. Services Required

Primary	Energy Conservation Design
Secondary	Commissioning
	Retro-Commissioning
	Energy Auditing
	Lighting Design
	Maintenance Planning
	Utility Bill Analysis
Other	Specialty for various assignments.

E. Anticipated Schedule

A/E Services Start (mm/yy)	07/11
Construction Contracts Start (mm/yy)	Varies
A/E Services Completed (mm/yy)	Varies
Construction Contracts Completed (mm/yy)	Varies

F. EDGE Participation Goal

Percent of *initial* TOTAL A/E Fee	0

G. Evaluation Criteria for Selection

Demonstrated ability to meet Owner's programmed project vision, scope, budget, and schedule on previous projects. Relevant past performance of prospective firm.

Qualifications and experience of individual firm's staff. Specification writing credentials and experience. Experience and capabilities of creating or using Alternative Dispute Resolution. Proposer's apparent resources and capacity to meet the needs of a typical project. The selected firm must have the capability to use the Internet within their normal business location(s) during normal business hours.

Prior to executing the Agreement, the selected firm must represent and warrant that it has not provided any material assistance, as that term is defined in O.R.C. Section 2909.33(C), to an organization that is identified by, and included on, the United States Department of State Terrorist Exclusion List and that it has truthfully answered "no" to every question on the Declaration Regarding Material Assistance/Non-Assistance to a Terrorist Organization, and that it has provided or shall provide such to the Contracting Authority and/or the Ohio Business Gateway (https://ohiobusinessgateway.ohio.gov/OBG/Membership/Security.mvc).

Prior to executing the Consultant Agreement, the selected firm must represent and warrant that it will not perform any of its services outside of the United States.

All questions regarding this Request for Qualifications are to be submitted in writing (absolutely no answers will be provided to phone inquires) to the attention of "RFQ-DAS-11N777" at StateArchOff@das.state.oh.us. Questions will be answered and posted to the OAKS Capital Improvements Web site at http://ci.oaks.ohio.gov on a regular basis until one week before the time of proposal submittal. The name or firm of the party submitting a question will not be included on the Question and Answer Document posted by SAO.

Anticipated Schedule:

Response Deadline: Feb. 17, 2011
Announce List for Presentations: March 2011
Presentations in Columbus: March-April 2011
Pre-Qualification will be effective for the period covering July 1, 2011 – June 30, 2013

H. Submittal Instructions

Firms are required to submit a current SAO-F110-330 Statement of Qualifications (blank forms are available as a free download from the SAO website at http://ohio.gov/sao). A CD-ROM with all pages consolidated into a single PDF file must be submitted enclosed in an envelope, sealed, addressed, and mailed or delivered to the State Architect's Office, Attn: Program Services, 4200 Surface Road, Columbus, Ohio 43228-1395. Label the CD-ROM with the project number listed on the RFQ and your firm's name.

Paper copies or submittals that are e-mailed or faxed will NOT be accepted.

Electronic submittals must 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 Professional or similar software for creating a PDF rather than using a scanner. If possible, please reduce the file size of the PDF. In Adobe Acrobat Professional, go to Advanced, then PDF Optimizer.

The following special instructions apply to completing the SAO-F110-330 form for this selection:

- Firms are requested to list the Project No. (indicated on Page 1 of this RFQ) on the first page of Part I and on Part II of the SAO-F110-330.
- Firms are requested to indicate their EDGE-certified business status as either "Certified" or Non-certified" on Part I Section C (Proposed Team).
- Firms performing current Consultant List projects should identify those projects on Page 1 of Section F (Example Projects Which Best Illustrate Proposed Firm's Qualifications for this Contract).
- Do not submit Page 2 of Section F (Relevant Projects Experience Matrix).
- Do not submit Page 3 of Section H (Commitment to Participate in the EDGE Business Assistance Program).
- Firms are requested to identify their experience, preparedness, software, and training relevant to their use of energy modeling and analysis tools. Provide in narrative form in Section H of the SAO-F110-330 form.
- Firms are requested to identify professional registrations, memberships, and certifications including but not limited to: CCCA, CCM, CCS, CDT, CEM, LEED (Green Associate), LEED AP (legacy), LEED AP+ (with

specialty), and any other appropriate design and construction industry certifications.* Identify this information on the resume page for each individual in Block 22, Section E the SAO-F110-330 form.

* CCCA: Certified Construction Contract Administrator (Construction Specifications Institute (CSI))
CCM: Certified Construction Manager (Construction Management Association of America)
CCS: Certified Construction Specifier (CSI)
CDT: Construction Documents Technologist (CSI)
CEM: Certified Energy Manager (Association of Energy Engineers (AEE))

LEED Credentials: Leadership in Energy & Environmental Design (Green Building Certification Institute)

GA: Green Associate
AP: LEED AP (Legacy LEED Accredited Professional without specialty)
AP +: (see below)
- LEED AP BD+C (Building Design and Construction specialty)
- LEED AP ID+C (Interior Design and Construction specialty)
- LEED AP O+M (Operations and Maintenance specialty)
- LEED AP ND (Neighborhood Development specialty)
- LEED AP Homes (Specialty for residential LEED construction)

I. Additional Information

Following this submission, SAO will evaluate the proposals submitted and identify a list of firms for pre-qualification presentations. These presentations are designed to familiarize SAO staff with the qualifications of firms by further exploring their proposals and the scope and nature of the consulting services they provide. SAO will seek Controlling Board approval of all submitting firms for contracting eligibility through June 30, 2013.

Consultant Selection Rating

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Project Name: Energy and Commissioning Consultant List
Project Location: Various
Project Number: DAS-11N777
Proposer Firm: _____
City, State, Zip: _____

Selection Criteria			Value	Score
1. Firm Location and EDGE Status				
Location of firm and EDGE-certified status	Out of State		0	
	Ohio Firm		5	
	EDGE Certified		10	
2. Firm Size				
Number of professional staff within primary firm available to perform the work.	Small = Less than 6 professionals		4 - 5	
	Medium = 6 to 8 professionals		2 - 3	
	Large = More than 8 professionals		0 - 1	
3. Current Workload				
Amount of fees awarded by the Contracting Authority to the primary firm in the previous 24 months (exclude projects on hold)	Less than $100,000.00		4 - 5	
	$100,000.00 to $300,000.00		2 - 3	
	More than $300,000.00		0 - 1	
4. Primary Firm Qualifications				
a. Project Management Lead	Experience / ability of project manager to manage scope / budget / schedule / quality		0 - 10	
b. Project Design Lead	Experience / creativity of lead designer to meet needs of owner		0 - 10	
c. Technical Staff	Experience / ability of technical staff to develop quality construction documents		0 - 10	
d. Construction Administration	Experience / ability of field representative to identify / solve issues during construction		0 - 10	
5. Project Team Qualifications				
a. Previous Team Collaboration (Internal) Number of projects that a majority of the team members have worked together	Less than 4 projects (Low)		0 - 1	
	4 to 7 projects (Average)		2 - 3	
	More than 7 projects (High)		4 - 5	
b. LEED* Experience within Team	LEED AP Credentials** (Maximum of 3 points)	GA	1	
		AP	2	
		AP+	3	
	LEED Registered (RP) projects -OR- LEED Certified (CP) projects (Maximum of 2 points)	RP	1	
		CP	2	
	Satisfies ALL above Criteria		Sum = 0 - 5	
c. Team Organization	Clarity of responsibility / communication demonstrated by table of organization		0 - 5	
6. Overall Project Team Experience				
a. Budget & Schedule Management	Performance in completing projects within original budget and schedule limitations		0 - 5	
b. Experience with SAO Consultant List Projects in the previous 24 months	Less than 2 projects (Low)		7 - 10	
	2 to 3 projects (Average)		4 - 6	
	More than 3 projects (High)		0 - 3	
c. Past Performance	Level of performance as indicated by past evaluations / letters of reference		0 - 5	
d. Knowledge of State of Ohio Capital Project Administration Process	Less than 2 projects (Low)		0 - 3	
	2 to 3 projects (Average)		4 - 6	
	More than 3 projects (High)		7 - 10	
			Subtotal	

* LEED = Leadership in Energy & Environmental Design developed by the U.S. Green Building Council
** See list of LEED credentials in Section H of the RFQ

Notes:

SAO Evaluation:

Name _____

Signature _____ Date _____