

Request for Qualifications (CM at Risk Contract)

State of Ohio Standard Forms and Documents

Administration of Project: Local Agency

Project Name	<u>Warren Commons</u>	Response Deadline	<u>February 10, 2022 5:00pm</u>	local time
Project Location	<u>2011 Franklin Avenue</u>	Project Number	<u>MH-TBD</u>	
City / County	<u>Toledo/Lucas</u>	Project Manager	<u>Laurie Sutherland</u>	
Owner	<u>Warren Commons, LLC (c/o Community Housing Network, Inc.)</u>	Contracting Authority	<u>Community Housing Network, Inc.</u>	
Delivery Method	<u>CM at Risk</u>	Prevailing Wages	<u>Federal/Project Labor Agreement</u>	
No. of paper copies requested (stapled, not bound)	<u>0</u>	# electronic copies requested on USB drive or web based file sharing system (PDF)	<u>1</u>	

Submit the requested number of Statements of Qualifications (Form F110-330) directly to Laurie Sutherland, Senior Development Project Manager at Community Housing Network, Inc., 1680 Watermark Drive, Columbus, Ohio 43215. See Section G of this RFQ for additional submittal instructions.

Submit all questions regarding this RFQ in writing to Laurie Sutherland, Development Manager at Community Housing Network, 1680 Watermark Drive, Columbus, Ohio 43215 with the project number included in the subject line (no phone calls please). Questions will be answered and posted the Community Housing Network's website at:

<https://www.chninc.org/press-releases> on a weekly 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.

Project Overview

A. Project Description

Build a 46 unit, 3-story multifamily apartment building, known as Warren Commons, and a 23 space parking lot on a site located at 2011 Franklin Avenue, Toledo, Ohio 43620. The site is vacant and approximately 2.12 acres.

Professional design services are being acquired by the Owner under a separate contract with Berardi + Partners Architects. Berardi + Partners Architects will develop the Program of Requirements (POR), except that the following items will be submitted by the CM at Risk or its Subcontractors as a Deferred Submittal:

- Fire Alarm System Construction Documents (Delegated Design / Shop Drawings) per section 907.1.1 Ohio Building Code 2011, the national fire alarm code (NFPA-72) and HUD MAP Chapter 5 Guidelines; provided by a licensed Fire Alarm Contractor bearing their registration number.
- Elevator System Plans specifications and details (elevator machinery and cab assemblies, door assemblies, related controls and components, hoistway details, communications, service connections, fireman's service, ect.) shall be required per section 3001.0 Ohio Building Code 2011, the American Society of Mechanical Engineers (ASME A171.1) and HUD MAP Chapter 5 Guidelines;
- Automatic Fire Suppression System Construction Documents (Delegated Design / Shop Drawings) per Section 106.1.1.1 Ohio Building Code 2011, standards for the installation of sprinkler systems (NFPA-13 & 13-R) and HUD MAP Chapter 5 Guidelines; provided by a licensed Fire Suppression Contractor bearing their registration number; and,
- Certified (Wood) roof truss and floor joist truss details per section 2303.4.1 Ohio Building Code 2011 and HUD MAP Chapter 5 Guidelines; sealed by a licensed engineer.

All aspects of the project and related issues will be implemented and operated consistent with the Contracting Authority (Community Housing Network, Inc.) and Owner's policies and procedures.

Total Building Square Footage: 44,334

All 46 units are one-bedroom units.

Building is to be an R-2 use group, 3 story apartment building designed for residents with special needs, including mental illness, low-incomes and disability. Handicap accessibility shall be in conformance with the Fair Housing Amendment and FHAG (Fair Housing Accessibility Guidelines) and conform to the requirements for Type 'B' units under ANSI 117.1. Five percent of the units shall be in accordance with the Uniform Federal Accessibility Standards (UFAS) and conform to the requirements for type 'A' units under ANSI 117.1. Two percent of the units shall be designed under the UFAS code for

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sensory impairment. Public spaces including the lobbies, corridors, and public restrooms, shall comply with the Americans with Disabilities Act and ADAAG (Americans with Disabilities Act Design Guidelines).

The project will be designed to meet Energy Star Multifamily New Construction standards.

B. Scope of Services

The selected Construction Manager at Risk (CMR), as a portion of its required Scope of Services and prior to submitting its proposal, will discuss and clarify with the Contracting Authority and/or 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 Construction Document stage; 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 Stages; and Warranty Period.

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 on the a best value practice proposed by the CM at Risk that will be reviewed and approved by the Contracting Authority and/or Owner, the A/E and the CM. The Contracting Authority and/or 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 Contracting Authority and/or Owner, A/E and Project Team, and will provide, among other services, cost estimating, budgeting, value engineering, constructability review, scheduling and preconstruction planning throughout the preconstruction stages. The drawings and specifications (Basis Documents) are substantially complete at the time of this RFQ.

Upon selection from the RFP process, the Basis Documents shall be provided to the CM together with Addendums that outline changes from the RFP's Basis Documents, the A/E's detailed listing of any material incomplete design elements and the A/E's statement of intended scope with respect to such incomplete elements (the "Design Intent Statement"). The CM shall submit to the Contracting Authority and/or Owner and the A/E their proposed CM at Risk Fees (the "Revised Contract Fees") and its qualifications and assumptions based upon the Basis Documents, Addendums, and the Design Intent Statement. The CM, the Contracting Authority and/or Owner and the A/E (along with selected engineers and consultants) shall meet to reconcile any questions, discrepancies or disagreements relating to the qualifications and assumptions, the Basis Documents, Addendums or the Design Intent Statement. The reconciliation shall be documented by an addendum to the qualifications and assumptions that shall be approved in writing by the Contracting Authority and/or Owner, the A/E and the CM.

The CM shall then acquire subcontractor bids and compile a detailed construct cost and submit to the Contracting Authority, for approval, the CM's proposed Final Contract Sum based upon the Basis Documents, the approved qualifications and assumptions and the Design Intent Statement. Contingent upon the Contracting Authority's approval of the Final Contract Sum, the parties will enter into an amendment to the Agreement establishing the Final Contract Sum (GMP Amendment). The Final Contract Sum shall not exceed the Project Budget established for construction. If the proposed Final Contract Sum exceeds such budget (not including any changes approved by the Owner) then the Contracting Authority may terminate the agreement with the CM and seek from other firms, bids 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 monitoring compliance with all HUD Section 3 Clause of HOME program, MBE/WBE goals, Project Labor Agreements, equal employment, and prevailing wage requirements, and submitting monthly reports of these activities to the Contracting Authority and Owner. All subcontracts shall be on the subcontract form prescribed by OAC Section 153:1-03-02. The Contracting Authority and/or Owner and the Architect reserve 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. Ohio Housing Finance Agency (OHFA) Low-Income Housing Tax Credit experience, including # projects, # of units, and Contract Amounts, if available.

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2. Multifamily residential apartment buildings within a cost range of \$6 million to \$10 million, including project name, location, date completed, developer and developer contact information, if available.
3. Energy Star Multifamily New Construction documentation experience.
4. Publicly funded projects that require Project Labor Agreements meeting Lucas County's standard and documentation experience with Federal Davis-Bacon wage rates.
5. Construction Manager at Risk projects.
6. Experience working in the City of Toledo.
7. Staff experience with construction of multifamily tax credit development and specifically the planned superintendent's experience.
8. The capacity of the CM at Risk for incorporating the project into its existing and planned projects based on the schedule outlined below.
9. Principal office is located within 25 miles of the project site.

C. Funding / Estimated Budget

Total Project Cost	<u>\$12,804,798</u>
Construction Cost*	<u>\$9,000,000</u>
Estimated CM Fees	<u>\$1,000,000</u>
State Funding	<u>\$1,050,000</u>
Other Funding	<u>\$11,800,800</u>

*Includes Site Work, FFE, Construction Insurance, Tap Fees, Building Permits and CM Fees (General Conditions, Overhead, and Profit)

D. Anticipated Schedule

CM Services Start (mm/yy)	<u>06/2022</u>
GMP Approval (mm/yy)	<u>07/2022</u>
Construction Stage Start (mm/yy)	<u>08/2022</u>
Construction Stage Completed (mm/yy)	<u>10/2023</u>
CM Services Completed (mm/yy)	<u>11/2023</u>

D. Evaluation Criteria for Selection

Selection Criteria:

The CM will be selected using (i) a qualification based selection process during the initial Request for Qualifications (RFQ) stage to develop a short list of three to five qualified CM at Risk agents and (ii) a best value selection process during the final Request for Proposal stage for the final CM at Risk selection. The qualifications-based selection criteria for the RFQ are included in this announcement. The best value criteria used in evaluating proposals from the short listed firms will include such factors that are determined to derive or offer the greatest value to the State and the Owner, combining qualifications, and CM-at-Risk fees.

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 Contracting Authority will select a short list of no fewer than three candidates and no more than five that it considers to be the most qualified, except if the Contracting Authority 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 profit, overhead, and general conditions fees, including, construction stage personnel costs, construction stage itemized general conditions cost percentage, construction stage contingency percentage and construction stage fee percentage. The short-listed candidates will also receive (i) a form of the Agreement with the Owner/Contracting Authority containing the contract terms and conditions, (ii) a set of the most recent design documents and (iii) a 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 Contracting Authority and/or Owner. The purpose of the pre-proposal meeting is to permit the short-listed firms an opportunity to ask the Contracting Authority and/or Owner questions in an individual setting to help the firms prepare their responses to the RFP. The Contracting Authority will notify each short-listed firm to schedule individual times for the pre-proposal meetings.

Interview:

After submitting responses to the RFP, the short-listed firms will be interviewed by the Contracting Authority and representatives of the Owner. The purpose of the interview will be to meet the proposed Project team, become familiar

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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, budget and funder's requirements. The Contracting Authority will notify each short-listed firm to schedule individual times for the interviews.

Selection Schedule:

Tentative schedule is subject to change.

RFQ Posted and Advertised	January 18, 2022
Qualifications Due	February 10, 2022
RFQ Selections for RFP	February 17, 2022
Request for Proposal and Pricing (Fee Structure) - "RFP" Issued to short listed CMs with Basis Documents	February 21, 2022
Pre-Proposal Meeting	February 28, 2022
RFP Response Due	March 7, 2022
Interviews	March 21, 2022
Selection of CM	March 28, 2022

Cancellation and Rejection:

The Contracting Authority 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 Contracting Authority shall have no liability to any proposer arising out of such cancellation or rejection. The Contracting Authority reserves the right to waive minor variations in the selection process.

E. Submittal Instructions

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 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. Also, please label the USB drive with the project number and firm name.

Facsimile or e-mailed copies of the Statement of Qualifications will not be accepted. Dropbox, Sharepoint, and other web-based file sharing services will be accepted, in lieu of a USB drive.

Unless otherwise noted or exempt, all documents submitted to the Contracting Authority in response to this RFQ or 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 project budget 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.
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.

Firms are requested to identify professional registrations, memberships and credentials including but not limited to: LEED GA, LEED AP, LEED AP+, CCCA, CCM, CCS, CDT, DBIA, CPE, 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.

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

GA: Green Associate

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)

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AP: LEED AP (Legacy LEED Accredited Professional without specialty)
AP +: (see below):

Other Industry Credentials

ACEC: American Council of Engineering Companies
AIA or FAIA: American Institute of Architects
CCCA: Certified Construction Contract Administrator (CSI)
CCM: Certified Construction Manager (CMAA)
CCS: Certified Construction Specifier (CSI)
CDT: Construction Document Technologist (CSI)
CMAA: Construction Management Association of America

LEED AP Homes (Specialty for residential LEED construction)
CPE: Certified Professional Estimator (American Society of Professional Estimators)
CSI or FCSI: Construction Specifications Institute
DBIA or Associate DBIA: Design-Build Institute of America (list credentials, not memberships)
NCARB: National Council of Architectural Registration Boards (list certification only)
NCIDQ: National Council for Interior Design Qualification
NSPE: National Society of Professional Engineers

CM at Risk Selection Rating Form

State of Ohio Standard Forms and Documents

Project Name Warren Commons Proposer Firm _____
 Project Number MH-TBD City, State, Zip _____

Selection Criteria		Value	Score
1. Primary Firm Location and Workload (Maximum 12 points)			
a. Proximity of firm to project site	Less than 25 miles	5	
	26 miles to 50 miles	1	
	More than 50 miles	0	
b. Provide firms analysis of proposed project team's capacity based on staff current workload by project and contract values	Number projects and value of contracts assigned to proposed project team at time of Construction	0-1	
c. Amount of contracts awarded in Lucas County in previous 24 months	Less than \$5,000,000	0	
	\$5,000,000 to \$15,000,000	3	
	More than \$15,000,000	4	
2. Primary Qualifications (Maximum 20 points)			
a. Project management lead	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 5	Max = 15
b. Project administration lead	Experience / ability to effectively administer project controls and processes	0 - 5	
c. Technical staff	Experience / ability of technical staff to develop accurate estimates and schedules	0 - 5	
d. Construction administration staff	Experience / ability of field representative to identify and solve issues during construction	0 - 5	
3. Overall Team Qualifications (Maximum 10 points)			
a. Previous collaboration with Architect	Less than 5 sample projects	1	Max = 3
	5 to 9 sample projects	2	
	More than 9 sample projects	3	
b. Energy Star for MF Registered / Certified project experience	1 to 3 projects	1	Max = 2
	More than 3 projects	2	
c. Experience with MBE/WBE targets	Past performance as indicated by self-evaluation and letters of reference	0-6	
d. Experience with Section 3 Labor Participants	Past performance as indicated by self-evaluation and letters of reference	0-6	
e. Team organization	Clarity of responsibility / communication demonstrated by submittal	0 - 6	
4. Overall Team Experience (Maximum 50 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 5 projects	0 - 3	
	5 to 9 projects	4 - 6	
	More than 9 projects	7 - 10	
c. Budget and schedule management	Performance in completing projects within original construction budget and schedule	0 - 10	
d. Completion of Ohio Housing Finance Agency multifamily program requirements	Less than 2 projects	0	
	2 to 5 projects	5	
	More than 5 projects	10	
e. Experience implementing Lucas County Project Labor Agreements	0 projects	0	
	1 to 3 projects	5	
	4 or more projects	10	
f. TEAM: Evaluation of overall qualifications and capability of proposed team for this project		0-10	
		Subtotal	

Notes:

Evaluator:

Name _____

Signature _____

Date _____