

**THE BIG WALNUT LOCAL SCHOOL DISTRICT BOARD OF EDUCATION REQUEST
FOR QUALIFICATIONS FOR DESIGN PROFESSIONAL SERVICES**

Dated: November 18, 2024

Project Owner: Big Walnut Local School District Board of Education

Project Name: Facilities Master Planning Project

Project Location: Various locations throughout the District

Delivery Method: To be determined

Deadline to Submit Qualifications: 12:00 p.m. local time, **December 20, 2024**

The **Big Walnut Local School District Board of Education** (the "District" or "Owner"), is soliciting Statements of Qualifications ("SOQs") from qualified individuals or firms to provide Design Professional Services for its **Facilities Master Planning Project** (the "Project").

The District seeks assistance with master planning and design services, including construction administration, for some or all of the improvements identified in the master plan. At the conclusion of the master planning phase, and availability of funds to proceed with some or all of the improvements identified, if the Board is satisfied with the services provided by the firm selected, it will negotiate an agreement for design services and compensation for those services with the firm. The Board reserves the right to not proceed with the selected firm for the design of improvements; in that case, the amount paid for master planning services will be the total amount owed to the selected firm, as provided in the master planning agreement between the parties.

Qualifications received may be retained in a file maintained by the District for design professional qualifications, unless the firm specifically requests not to be included in this file. The file may be used for projects or design needs for which design fees are estimated to be less than \$50,000. Each firm is requested to provide annual updates to the qualifications to keep them current.

NOTICE: ANY RESPONSE TO THE DISTRICT'S REQUEST FOR QUALIFICATIONS THAT INCLUDES PROVISION FOR OR REFERENCE TO BOND OR LEVY CAMPAIGN SERVICES OR SUPPORT WILL AUTOMATICALLY BE DISQUALIFIED FROM CONSIDERATION. PURSUANT TO OHIO REVISED CODE 9.03, PUBLIC FUNDS MAY NOT BE USED TO SUPPORT OR OPPOSE A BOND OR LEVY ISSUE.

Submittals:

Interested individuals or firms must submit **1 hard copy and 1 electronic copy in PDF format**, before the submittal deadline above.

Submit the **hard copy** of the SOQ, enclosed in a sealed envelope. The envelope shall be plainly marked on the outside "**BIG WALNUT LOCAL SCHOOLS – FACILITIES MASTER PLANNING PROJECT - DESIGN PROFESSIONAL QUALIFICATIONS.**" Hard copies of the SOQs must be delivered to the following address, before the submittal deadline above:

Big Walnut Local School District Board of Education
ATTN: Scott Gooding, Interim Treasurer/ CFO
110 Tippet Court

Sunbury, Ohio 43074

Hand deliveries to this location may be made during the District's operating hours, which Respondents are responsible for confirming.

Submit the electronic copy of the SOQ to the following ShareFile link:

<https://bricker.sharefile.com/r-r69b18629c65f49e482b3da8b1442406c>

(To access simply enter the ShareFile link above into your web browser, enter your email address and name and then "drag and drop" your electronic file into the folder or use the browse function to locate the file.)

The District 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.

Anticipated Scope:

The Project is anticipated to include the evaluation of existing District facilities and projected enrollment to assist with the future design and construction of various improvements throughout the District, with a focus on improving the efficiency of the District's existing facilities.

Questions, Clarifications and Addenda:

All questions concerning this RFQ shall be directed in writing via email to **James Hall, Director of Facilities**, at jameshall@bwls.net, with a copy to **Scott Gooding, Interim Treasurer/ CFO**, at scottgooding@bwls.net by 5:00 p.m., 5 calendar days prior to the submittal deadline. Questions will be reviewed, and the District 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.

Qualifications:

Submittals should include the following:

1. Firm's History– Information about the firm's history (number of years in business, etc.).
2. Education & Technical Training/Experience – Identify your firm's assigned team for the master planning phase, design phase, and construction administration phase. Provide the education, technical training, and experience of the principal in charge of the Project and the Project Manager, as well as any other individuals assigned to the Project, and proposed consultants, if any. Detail the assigned team's experience in providing substantially similar services (i.e., master planning, programming/program evaluation, estimating, design/construction administration services for similar facilities and similar projects with an emphasis on similar school construction and educational planning projects) and the team's experience working together on similar projects. Describe:
 - a. Describe your firm's overall process for school district Master Planning.

- b. Be very specific in detailing your firm's process of engaging the community in the Master Planning process. List 3 references that articulate clearly what your firm did for them in this area.
 - c. Describe the team's experience with educational planning initiatives, including experience with 21st Century learning principles.
 - d. List the firm's experience with "partnering" with community groups, i.e., YMCA/YWCA, city governments, booster groups, libraries, etc.
 - e. Experience, planned approach, and specific expertise in assisting with Project planning, estimating, and schedule development. Include the team's experience leading and participating in meetings with the public entity boards on similar projects.
 - f. Approach to incorporating practical, tested, energy efficiency and sustainability features into similar projects that will enhance the design, be easy/economic to maintain and contribute to energy conservation and savings for the long-term maintenance and operations;
 - g. Experience and approach to obtaining all applicable permits and governmental approvals (including approval of plans) from the Authorities Having Jurisdiction, including but not limited to interpreting requirements/obtaining approval for zoning and the design review board.
3. Workload – Describe the current workload and availability of the firm and personnel assigned to the Project team, the available equipment and facilities, and the team's ability to perform the required professional design services competently and expeditiously (i.e., are resources currently available or committed to other projects).
4. Proposed Schedule –
 - a. Proposed design phase milestones for completion of the Design Professional's services including completion dates or durations in calendar days for master planning, programming, design documents, and construction documents, as well as an anticipated timeline for the bidding, construction and close-out phases of the Project. Provide a detailed narrative demonstrating the firm's ability to manage the Project schedule during the design phase and construction phase.
5. Past Performance based on References – Past performance as reflected in evaluations of previous and current clients for which the firm has provided or is providing similar services; please include a list of at least five (5) relevant projects involving similar services performed by the firm during the past five years. Include the following information for each project:
 - a. Project owner, name of project and location;
 - b. Brief description of the project, including size of project (e.g., square footage/area) and project delivery model (e.g., general contractor, construction manager at risk, design-build, etc.);
 - c. The initial scheduled completion date and the actual date services were completed or the current anticipated completion date;

- d. Construction budget, change order amounts, and actual construction cost;
 - e. Your firm's assigned team members for the project;
 - f. Other relevant information about the project and the firm's services; and
 - g. Reference contact person and phone number.
6. Past Performance with Owner – Describe the firm's past experience with the Owner, if any.
7. Proximity to the Site – The firm's location and proximity to the site for purposes of site visits and attending meetings with the Owner.
8. Project Estimates and Budget
 - a. Describe the firm's procedures for Project budget development, including but not limited to, procedures for initial budget development with the Owner and the process for reviewing and evaluating the budget in coordination with the Owner at various stages of the design process; and
 - b. Describe the firm's experience over the past five years with preparing or evaluating project estimates and construction costs, monitoring project costs, and completing a project within the initial budget with emphasis on any experience with general contractor projects.
9. Unique Qualities and/or Expertise of the Assigned Team – Identify the unique competence, qualities, and/or expertise that set the firm's assigned team apart from other firms and teams as it relates to the required services for the Project. List a maximum of four specific and unique qualities that set your team apart from others in relation to the Owner's Project.
10. Professional Liability Insurance Coverage & Claims History – Include:
 - a. The coverage amounts and types of insurance coverage, particularly the firm's commercial general liability and professional liability limits;
 - b. Specific information about any claims asserted against the firm or its professional liability carrier within the last ten (10) years, including the resolution of the claim(s);
 - c. Any statistics kept internally on change order history, project completion, and budget considerations, recognizing that each change order is unique as to its causes. The Owner is interested in information that will show consideration of budget requirements; and
 - d. Specific information about any claims asserted by the firm within the last ten (10) years, including the resolution of the claim(s).
11. Construction Phase Services – The firm's practices with respect to site visits and oversight of the Project are subject to the Architect Agreement requirements. Generally, does the

frequency of visits typically change based upon the stage of construction? What amount of time is spent on average on site during the construction phase? What is the background of the individuals who would be visiting the Project during construction? What documentation of such site visits is prepared and maintained?

Pre-Submittal Site Visit:

During the RFQ phase, Respondents may submit a written request to visit the site(s). Such written request must be made by email to **James Hall, Director of Facilities, at jameshall@bwls.net, with a copy to Scott Gooding, Interim Treasurer/ CFO, at scottgooding@bwls.net**. The District reserves the right to have a representative present during the visit.

Evaluation & Selection:

Firms submitting SOQs for the available contract will be evaluated and the District will select and rank at least three firms which it considers to be the most-qualified to provide the required services. However, if the District determines that fewer than three qualified firms are available, it will select and rank those firms. Such evaluation and selection is subject to the District's absolute right to stop the process and refrain from entering into any contract. The District may require additional information from one or more Respondents to supplement or clarify the SOQs submitted. The individual project teams from select firms may be asked to meet with District representatives to present the firm's qualifications and proposed approach for the Project before final ranking and selection is made. The individual team members that will be involved with the Project must attend such meeting.

Upon selection of the firm determined to be most qualified to provide the requested services for the Project, the District reserves the right to negotiate the price for services to be provided, with such firm. If the District and the selected firm agree to a price and scope of services, the form of agreement or agreements between the District and the selected firm will be proposed by the District for consideration and negotiation with the selected firm, subject to approval and acceptance by the District in its sole discretion.

Qualifications received may be retained in the file maintained by the District for design professional qualifications; each firm is requested to provide annual updates to the qualifications to keep them current.

Attachments:

None