

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

**Dated: JULY 22, 2024**

**Project Owner:** BIG WALNUT LOCAL SCHOOL DISTRICT

**Project Name:** BACK-UP GENERATOR AT GENERAL ROSECRANS ELEMENTARY SCHOOL

**Project Location:** 301 SOUTH MILLER DR. SUNBURY, OHIO

**Delivery Method:** General Contractor per the Ohio Revised Code

**Deadline to Submit Qualifications:** **3:00 p.m.** local time, August 9, 2024

The BIG WALNUT LOCAL SCHOOL DISTRICT (the "District"), is soliciting Statements of Qualifications ("SOQs") from qualified individuals or firms to provide Design Professional Services for its BACK-UP GENERATOR AT GENERAL ROSECRANS ELEMENTARY SCHOOL (GRE) Project (the "Project"). The District reserves the right to add additional scope and services if further improvements are identified and funds are available. The District anticipates that it will use a general contractor for the construction of the Project and statutory competitive bidding as required by law.

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.

**Submittals:**

Interested individuals or firms must submit **3 hard copies and 1 electronic copy in PDF format** on CD-DVD or flash drive, of their SOQs, enclosed in a sealed envelope. The envelope shall be plainly marked on the outside "**BIG WALNUT LOCAL SCHOOL DISTRICT BACK-UP GENERATOR AT GENERAL ROSECRANS ELEMENTARY SCHOOL PROJECT DESIGN PROFESSIONAL QUALIFICATIONS.**"

SOQs must be delivered to the following address, before the submittal deadline above:

BIG WALNUT LOCAL SCHOOL DISTRICT

ATTN: James Hall  
110 Tippett Court  
Sunbury, Ohio 43074  
jameshall@bwls.net

**Hand deliveries to this location may be made at the above address between 7:00 a.m. and 3:00 p.m. and must be made before the deadline. However, Respondents are responsible for confirming current operating hours at The Big Walnut Local School District Board Office.**

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.

**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 by **4:00 p.m., 7 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.

**Background and Project Description:**

- A. The Project is anticipated to include the design and construction administration for the design and installation of a backup generator. The selected firm will be given access to any blueprints or plans the District may have in its records.
- B. The Design Professional will assist with budget development, subject to the District's approval.
- C. The District anticipates that the Design Professional will assist the District in program development/evaluating the program for the Project. The District anticipates the Design Professional will provide cost estimating (for base bid scope and individual alternates), design phase services, and construction administration services.
- D. The selected design professional will provide cost estimating (for base bid scope and individual alternates), design phase services, bid phase services including assistance with bid tabulation/evaluation and scope review with bidder(s), and construction administration services.
- E. The District anticipates that the Design Professional will assist with developing the schedule for the Project.

**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 Project. 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., programming/program evaluation, estimating, design/construction administration services for similar facilities and similar projects with an emphasis on similar public K-12 educational facility projects) and the team's experience working together on similar projects. Describe:

- a. 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.
  - b. 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;
  - c. 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 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 District, 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 District – Describe the firm's past experience with the District, 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 District.

8. Project Estimates and Budget

- a. Describe the firm's procedures for Project budget development and cost estimates, including but not limited to, procedures for initial budget development with the District, cost estimating, and the process for reviewing and evaluating the budget in coordination with the District 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 District'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 five 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 District 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 five (5) 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?

12. Proposed Modification to Agreement Terms – The Architect Agreement, which is a modified AIA Document B104-2017 Standard Abbreviated Form of Agreement Between District and Architect, is attached hereto as **Exhibit A** (the "Architect Agreement"). If your firm would like to propose any deviation from the terms of the Architect Agreement, you must identify those terms and submit your proposed modified language in detail in your SOQ in a section clearly titled "Proposed Modification to Agreement Terms". Failure to do so shall be deemed to be a waiver of the right to negotiate the terms. Modifications may be accepted in the District's sole discretion and may be taken in to account by District when ranking the most-qualified firms.

**Pre-Submittal Site Visit:**

During the RFQ phase, firms may visit the Project site from the general public's perspective.

**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 between the District and the selected firm will be the attached Architect Agreement with modifications proposed in accordance with this RFQ, if accepted by the District in its sole discretion. Any modifications to the attached Architect Agreement will be in the District's sole discretion, and the District at its option may accept or reject the proposed modifications. The District reserves the right to take any action affecting the RFQ process or the Project that it deems to be in its best interest.

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:**

Exhibit A – Architect Agreement