

**SYMMES TOWNSHIP BOARD OF TRUSTEES
HAMILTON COUNTY, OHIO**



**REQUEST FOR STATEMENT OF QUALIFICATIONS (“RFQ”)
FOR A CONSULTANT TO PROVIDE DESIGN SERVICES FOR THE
RENOVATION OF THE MEADE HOUSE**

**Township Administrator – Kim Lapensee
Public Works Director – Bill Pitman**

RFQ #001-2021

OWNER: Symmes Township Board of Trustees
Hamilton County, Ohio

ISSUED: April 14, 2021

STATEMENTS DUE: May 28, 2021

CONTACT: Kim Lapensee, Township Administrator
9323 Union Cemetery Road
Symmes Township, OH 45410
klapensee@symmestownship.org
Fax: (513) 683-6626

REQUEST FOR STATEMENT OF QUALIFICATIONS (“RFQ”) FOR A CONSULTANT TO PROVIDE DESIGN SERVICES FOR THE RENOVATION OF THE MEADE HOUSE

SECTION 1
INTRODUCTION

The Symmes Township Board of Trustees, Hamilton County, Ohio (hereinafter referred to as the “Owner”) hereby gives notice of its intent to contract (hereinafter referred to as the “Agreement”) for professional services. The selected professional services firm will serve as the Architect/Engineer (“A/E”) to the Board of Trustees and will provide Design Services related to the renovation of the Meade House located in the Meade Historic Preserve Park (11887 Lebanon Road 45140) in Symmes Township, Ohio (“Project”).

The renovated Meade House has an estimated project budget of \$750,000, and construction will commence in 2021.

The Owner invites interested parties to submit Statements of Qualifications (SOQs) for consideration by the Owner. SOQs will be reviewed, and an A/E firm will be selected.

Below is the schedule of the selection process:

Task	DATE
Initial RFQ Public Advertisement	April 21, 2021
Second RFQ Public Advertisement	April 28, 2021
Deadline for Receiving Final RFQ Questions	May 21, 2021 <i>by 12 Noon</i>
Deadline for Issuing Final RFQ Answers	May 28, 2021 <i>by end of business day</i>
Deadline for SOQs to be Received by Issuing Officer NOTE: Due to Covid-19, Proposals must be mailed or emailed. Please see Section 9 – Conclusion for details	June 4, 2021 by 11 AM
Proposal Review Completed (Approximately)	July 2, 2021
Written Decision Issued (Approximately)	July 9, 2021
Contract Negotiations/Contract Executed	August 3, 2021
Estimated Project Start-Up	September 1, 2021

SECTION 2
PROJECT OVERVIEW

This Project will require the Design Services (including pre-construction assistance, bidding assistance, construction administration and commissioning) for the renovation of the Meade House, a 1906 Greek Revival 2-story structure with an unfinished basement and attic space within the roof framing. The Owner will utilize Design-Bid-Build delivery methodology to manage the design and construction of the Project.

SECTION 3
ANTICIPATED SCOPE OF SERVICES

The A/E will provide Design Services as requested for the Project. As required by the Agreement, and as properly authorized, the A/E shall be capable of providing the following categories of services as required by the Owner (Note: required scope may change in response to project needs):

1. Upgrade building usage from existing “Residential” to “Assembly”, including, but not limited to:
 - Foundation renovations (and associated structural engineering calculations)
 - First floor structural renovations (and associated structural engineering calculations)
 - First floor settlement and deflection renovations
 - Mechanical, Electrical, Plumbing (MEP) renovations
 - Americans with Disabilities Act renovations
 - Fire sprinklers and emergency lighting renovations
 - Termite and organic material abatement
2. Coordination with the Ohio Building Code.
3. Coordination with the Ohio Historic Preservation Office (the Meade House is an Ohio registered historic structure).
4. Prepare cost estimates for design scope elements.
5. Potential coordination of multiple bid packages.
6. Development of technical construction documents (including drawings, technical specifications, and coordination of remaining front end and Division 1 specifications).
7. Assistance with the bidding, pre-award and pre-construction process (including attending pre-bid and post-bid meetings and pre-construction meetings).
8. Application of Good Faith Efforts for 10% Small Business Enterprise goals (firms registered with Hamilton County as SBE).
9. Leading and documenting weekly design coordination meetings.
10. Providing Construction Administration duties (including site visits and site inspections, submittal review and request-for-information review).
11. Reviewing and approving contractor pay requests.
12. Reviewing and approving proposed scope and costs for Change Orders.
13. Assembling contractor punch lists and ensuring satisfactory completion prior to contract closeout.
14. Providing other support staff, as needed, to supplement Township staff activities.

The Owner anticipates executing an Agreement with the selected A/E which sets forth the general terms and conditions governing the relationship as well as the hourly rates and/or fees to be charged for services.

SECTION 4
A/E QUALIFICATIONS

For purposes of this Request, the A/E’s qualifications include, but are not limited to the following:

1. Competence of the A/E firm to perform the required A/E services as indicated by the technical training, education, and experience of the firm’s personnel, especially the technical training, education, and experience of the employees within the firm who would be assigned to perform the services;
2. A/E firm’s demonstrated experience with registered historic building renovations;
3. A/E firm’s adaptive reuse experience and demonstrated knowledge of Ohio Building Code Chapter 34;
4. Ability of the firm in terms of its workload and the availability of qualified personnel, equipment, and facilities to perform the required A/E services competently and expeditiously;
5. Past performance of the firm as reflected by the evaluations of previous clients with respect to factors such as control of costs, quality of work and meeting of deadlines;
6. Other similar factors, including specific relevant experience of the firm and assigned personnel.

SECTION 5
INQUIRIES

All inquiries to this Request may be submitted in writing to:

Kim Lapensee, Township Administrator
9323 Union Cemetery Road
Symmes Township, OH 45410
klapensee@symmestownship.org
Fax: (513) 683-6626

Inquiries should reference specific sections of the Request (including page and paragraph references). All questions and answers to the inquiries will be communicated to all firms or individuals participating in this Request. The Township will not be bound by any responses provided to questions that are not submitted through this process. Inappropriate inquiries may constitute a basis for a negative evaluation.

SECTION 6 STATEMENT FORMAT/CONTENT

The format/content provisions listed below have been established to assist the Owner in its review and evaluation of all A/E SOQs. All statements must comply with the following format to allow the selection committee to fairly evaluate submittals:

COVER LETTER

- An introductory cover letter of not more than one (1) page.

EXECUTIVE SUMMARY

- A two (2)-page summary highlighting the contents of the Qualification Statement.

BACKGROUND/OVERVIEW

- Firm’s name, address, email address, telephone number and name of person to contact.
- Provide a brief firm history including years in existence and geographic office locations.
- Explain the structure of firm ownership (example – corporation, limited partnership etc.).
- Firm’s total number of in-house, full-time employees, their professional disciplines, local presence, and the number of employees in each discipline.
- Provide evidence of the firm’s financial stability, responsibility (submit your firm’s most recent audited financial statement).
- Current and projected workloads for the years 2021, 2022 and 2023 and ability to provide a long-term commitment to the Project.
- Provide your litigation, mediation, and arbitration history over the last five (5) years.

EXPERIENCE/REFERENCES

- List three recently completed projects of similar size and scope to this request. Include the following for each project identified:
 - Brief description and size; services provided by your firm and names of your staff members involved and their responsibilities.
 - Summarize project results in terms of budget, cost and schedule.
 - Owner’s name, address, phone number, email address, and contact person.
- Current and recent experience with Government projects not included above.

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PROJECT APPROACH

Describe your proposed methodology in providing A/E Services for this Project. Include within the description the following:

- ❑ Provide a brief explanation of your firm’s current A/E services.
- ❑ Provide a brief explanation of your firm’s A/E documentation process and reports provided to the owner.
- ❑ Practice with respect to oversight of the Project.
- ❑ Provide a list and description of any consultant(s) your firm proposes to use.

QUALITY CONTROL

- ❑ Provide a brief overview of your firm’s quality assurance plan and how that program is implemented.

COST CONTROL

- ❑ Explain the proposed method and system used by your firm to control the budget as the task progresses through each phase of the Project.

SCHEDULING

- ❑ Indicate the process your firm would use to contribute to the development and oversight of a project schedule and the process used to control this schedule during the design, construction and close-out phases.

PROJECT PERSONNEL

- ❑ Provide an organization chart showing the relationships between your personnel and those of your suggested consultants (if any). Include a one-page resume for each that highlights relevant experience and any professional qualifications for your firm’s proposed A/E personnel. List only individuals who will be assigned to the tasks and their role in the Project.

FINAL STATEMENT AND OPTIONAL INFORMATION

- ❑ Describe why your firm is the best choice for this Project.
- ❑ Include any additional information or description of resources supporting your firm’s qualifications or any other information you find appropriate to the Owner’s selection.

SECTION 7
SELECTION CRITERIA

Owner will review, evaluate and rank all statements of qualifications (see Exhibit A) received based on the following criteria and the qualifications previously described:

1. Competence of the firm to perform the professional A/E services as evidenced by the technical training, education and experience of the personnel within the firm who would be assigned to this Project;
2. Ability of the firm in terms of its workload and the availability of qualified personnel, equipment and facilities to complete the Project competently and on a timely basis;
3. Past performance of the firm as reflected by the evaluations of previous clients, including Owner, with respect to factors such as, but not limited to, control of costs, quality of work and meeting of deadlines;
4. Location of firm in relation to the Project site;
5. Firm's project approach.

SECTION 8
INSURANCE, INDEMNIFICATION AND HOLD HARMLESS

A. Indemnification and Hold Harmless

To the fullest extent permitted by and in compliance with applicable law, A/E shall defend, indemnify and hold harmless Symmes Township Board of Trustees and their employees, officials, agents and volunteers from any and all liability, losses, claims, suits, actions, administrative proceedings, regulatory proceedings / hearings, expenses, judgments, subrogation's (of any party involved in the subject of this contract), attorneys' fees, court costs, defense costs or other injury or damage, whether actual, alleged or threatened, resulting from injury or damages of any kind whatsoever to any business, entity or person (including death), or damage to property (including destruction, loss of, loss of use of resulting without injury damage or destruction) of whatsoever nature, arising out of or incident to in any way, performance of the terms of this contract including, without limitation, by the A/E, its subcontractor(s), the A/E's or its subcontractor's (s') employees and agents, assigns, and those designated by the A/E to perform the work or services encompassed by this contract.

B. Insurance

As required by Ohio Revised Code Section 153.70:

The A/E agrees to procure and maintain for the duration of this contract the following insurance: insurance against claims for injuries to persons or damages to property which may arise from or in connection with the A/E's products or services as described in this contract (commercial general liability); auto liability; professional liability and umbrella / excess insurance. Further, the A/E agrees to procure and maintain for the duration of

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this contract workers' compensation and Employer's Liability (Ohio Stop Gap) insurance. The cost of all insurance shall be borne by the A/E. Insurance shall be purchased from a company licensed to provide insurance in Ohio. Insurance is to be placed with an insurer provided an A. M. Best rating of no less than A: VII. The A/E shall purchase the following coverage and minimum limits:

- Commercial General Liability insurance policy with coverage contained in Insurance Services Office Occurrence with limits of at least \$1,000,000 per occurrence and \$2,000,000 in the aggregate and at least \$300,000 coverage in legal liability fire damage. Coverage will include:
 1. Additional insured endorsement
 2. Blanket contractual liability
 3. Broad form property damage
 4. Severability of interests
 5. Personal injury
 6. Joint venture as named insured (if applicable)
 7. Waiver of Subrogation

- Business auto liability insurance of at least \$1,000,000 combined single limit, on all owned, non-owned, leased and hired automobiles. Coverage will include:
 1. Additional insured endorsement
 2. Waiver of Subrogation
 3. Contractual Liability

- Umbrella and excess liability insurance policy with limits of at least \$5,000,000 per occurrence and in the aggregate, above the commercial general and business auto primary policies and containing the following coverage:
 1. Additional insured endorsement
 2. Pay on behalf of wording
 3. Concurrency of umbrella / excess insurance effective dates with primary effective dates
 4. Blanket contractual liability
 5. Punitive damages coverage (where not prohibited by law)
 6. Aggregate attachments: apply where applicable in the primary policy
 7. Each Umbrella / excess policy follows form of the primary policy, not underlying excess or umbrella policy.
 8. Drop down feature

- Workers' Compensation insurance at the statutory limits required by Ohio Revised Code and Employer's Liability coverage of at least \$1,000,000 per accident for bodily injury or disease for individuals employed by the A/E.

- Professional liability insurance coverage of at least \$2,000,000 per claim

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Further the A/E agrees with the following provisions:

- Symmes Township Board of Trustees and its employees, officials, agents and volunteers will be endorsed as additional insureds on the commercial general, business auto, umbrella / excess and employer liability policies. An endorsement specifying “Symmes Township Board of Trustees and their employees, officials, agents and volunteers” will be attached to the Certificate of Insurance sent to the Symmes Township Administrator.
- A/E shall declare any self-insured retention to Symmes Township pertaining to liability insurance. The A/E shall provide a financial guarantee satisfactory to Symmes Township guaranteeing payment of losses and related investigations, claims administration and defense expenses for any self-insured retention.
- If the A/E provides insurance coverage under a “claims-made” basis, the A/E shall provide evidence of either of the following for each type of insurance which is provided on a claims made basis: unlimited extended reporting period coverage which allows for an unlimited period of time to report claims from incidents that occurred after the policy’s retroactive date and before the end of the policy period (tail coverage), or; continuous coverage from the original retroactive date of coverage. The original retroactive date of coverage means original effective date of the first claims-made policy issued for a similar coverage while the A/E was under contract with the Symmes Township Board of Trustees.
- The A/E will require all insurance policies in any way related to the work and secured and maintained by the A/E to include endorsements stating each underwriter will waive all rights of recovery, under subrogation or otherwise, against Symmes Township Board of Trustees. The A/E will require of subcontractors, by appropriate written agreements, similar waivers each in favor of all parties enumerated in this section.
- The A/E and the Symmes Township Board of Trustees agree to fully cooperate, participate, and comply with all reasonable requirements and recommendations of the insurers and insurance brokers issuing or arranging for issuance of the policies required here, in all areas of safety, insurance program administration, claim reporting and investigating, and audit procedures.
- The A/E’s insurance coverage shall be primary insurance with respect to Symmes Township Board of Trustees and its employees, officials, agents and volunteers. Any insurance maintained by Symmes Township Board of Trustees shall be excess of the A/E’s insurance and shall not contribute to it.
- Each insurance policy required by this clause shall be endorsed to state that coverage shall not be cancelled or materially changed except when thirty (30) days prior written notice, including reasoning, has been given to:
Kim Lapensee, Township Administrator
9323 Union Cemetery Road
Symmes Township, OH 45410
klapensee@symmestownship.org
- A/E shall furnish the Symmes Township Administrator with original certificates and amendatory endorsements effecting coverage required by this clause. All certificates and endorsements are to be received by Symmes Township before

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contract commences. Symmes Township reserves the right at any time to require complete, certified copies of all required insurance policies, including endorsements affecting the coverage required by these specifications.

- Maintenance of the proper insurance for the duration of the contract is a material element of the contract. Material changes in the required coverage or cancellation of the coverage shall constitute a material breach of the contract.

If any or all of the work or services contemplated by this contract is sublet, the A/E will ensure the subcontractor(s) comply with all insurance requirements contained therein.

SECTION 9
CONCLUSION

Following submittal, Symmes Township will rank the firms using the selection criteria set forth in Exhibit A and forward a recommendation for contract award to the Symmes Township Board of Trustees. Upon Symmes Township Board of Trustees approval of the recommendation, the Symmes Township Administrator will negotiate a contract with the highest ranked firm. If the parties are able to successfully negotiate a contract, the Symmes Township Administrator will forward the contract to the Symmes Township Board of Trustees for formal approval. If the parties are unable to successfully negotiate a contract, negotiations will commence with the next highest ranked firm.

One (1) original copy (if mailing) and one (1) electronic copy (CD or Thumb Drive in one printable pdf file) proposal to: klapensee@symmestownship.org of the statements shall be submitted no later than **June 4, 2021 by 11 AM local time**. Statements received after this deadline will not be considered.

Statements shall be submitted to:

Kim Lapensee, Township Administrator
9323 Union Cemetery Road
Symmes Township, OH 45410

NOTE: Due to Covid-19, Proposals must be mailed to address above.

Statements shall be clearly marked:

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**EXHIBIT A
 SYMMES TOWNSHIP SELECTION RATING GUIDE FOR
 PLANNING AND DESIGN SERVICES FOR THE RENOVATION OF THE MEADE HOUSE**

Firm: _____

Evaluator’s Name: _____ Department: _____

Project Name: _____ Date: _____

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		VALUE	RATING	WEIGHT	SCORE
A. FIRM’S LOCATION (Proximity of office where majority of work is to be performed to project site)	0-50 miles	5			
	50-100	3		1	
	100 +	1			
B. PROJECT INTEREST AND UNDERSTANDING	Level of understanding of the project scope	1-5		5	
C. PROPOSED A/E MANAGER	Proposed person with prior similar project experience	1-5		2	
D. OFFICE STAFFING AND AVAILABILITY	Adequate staff available with technical skill	1-5		2	
	Proposed personnel’s prior experience	1-5		2	
E. FIRM’S PAST AND CURRENT PERFORMANCE	Relevant prior experience:				
	Conceptual designs	0-5		4	
	Design & construction administration	0-5		4	
NOTES: 1. Score = rating x weight.				TOTAL SCORE	