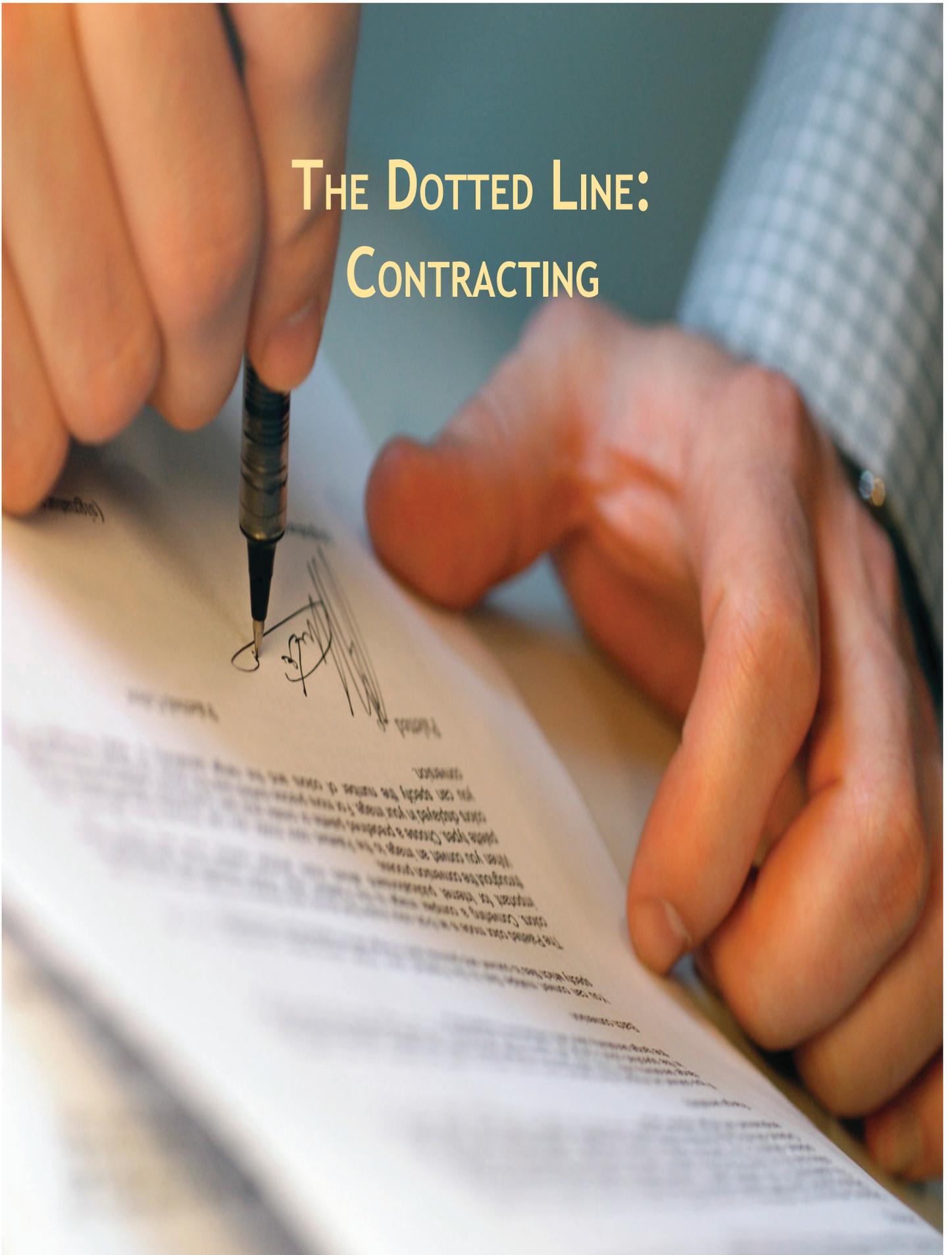


# THE DOTTED LINE: CONTRACTING



# *Contracting*

## **Contents**

### **Overview of the Contracting Phase**

*An excerpt from the Ohio School Design Manual on the contracting phase*

### **Role of the Project Administrator**

*Summary of responsibilities of the OSFC project administrator*

### **Project Contracting Structure**

*Flow chart showing the structure of the contracting process*

### **Financial Reporting**

*Memo with guidance to districts on the project reporting requirements*

### **Partnering**

*A brief overview of the partnering requirement*

### **Construction Management**

*Definition and role of the construction management firm*

### **CM Selection**

*A chart illustrating the process*

### **Sample CM Selection Forms**

## OVERVIEW OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS

### CHAPTER 1: INTRODUCTION

#### C. DETAILS OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS, continued

#### CONTRACTING

##### **State and District Project Agreement**

This standardized Agreement serves as the basis of the relationship between the school district and the OSFC until the Project Completion Certificate is signed. It has been coordinated with three other documents; the Architect's Agreement with the district, the CM's agreement, and the General Conditions or the Contracts for Construction.

##### **Contract for Design Professional**

The selection of the Design Professional to provide services for the Design/Bid/Build process is made by the school district through a publicly-advertised qualifications-based selection process. The typical process involves publicly requesting Statements of Qualifications, review and short-listing of the submitting firms, and final interviews to rank as many as three candidate firms. Only after selecting the top firm does the district enter into fee negotiations. OSFC must approve the DP's contract.

##### **CM Selection and Contract**

While the Architect is selected by the District, the selection of the Construction Management Firm is made by the OSFC with input from the District. The selection process again is a qualifications based open process involving advertisement, short-listing, interviews and final ranking and final selection. The fees are negotiated by the OSFC.

##### **Select Commissioning Agent**

The Commissioning Agent, employed directly by the District, acts independently of the HVAC Designers to assure that the Building Mechanical Systems will function within the parameters established as the basis for their design. Early in the design process the agent establishes a Commissioning Plan to be followed throughout design and construction efforts. The Plan establishes operational objectives, monitors installation procedures, and incorporates functional testing protocols.

***The Cx is an independent third party with no other ties to the project. The Cx cannot be tasked with conducting any subsequent corrective actions beyond that of their Cx role.***

---

---

# **OHIO SCHOOL FACILITIES COMMISSION ROLE OF THE PROJECT ADMINISTRATOR**

---

---

## **OVERALL ROLE**

1. Sole Interface for the School District, Construction Manager and the Architect
2. Accommodate Unique Needs of a School District within Framework of Commission Policies and Procedures
3. Facilitator to Assist Project Team through Resolution of Issues
4. Goodwill/Inspiration/Celebration

## **ROLE IN RELATION TO DESIGN MANUAL COMPLIANCE**

1. Probe and Question School District Initiatives in an Effort to Maximize Project Success
2. Point Out Potential Long and Short Term Issues with Various Options
3. Suggest Positive Alternatives

## **ROLE IN DESIGN PHASE OF THE PROJECT**

1. Focus in review and approval of the **Program of Requirements, Schematic Design Documents and Design Development Documents** is for conformance with the Master Facilities Plan, the Design Manual and overall completeness of submittals according to Phase Submission Requirements listed in Architect's Agreement
2. Probe and Question School District Initiatives; Recommend the Architect and Construction Manager explore alternatives and assist in evaluating alternatives
3. Focus on review and approval of the **Construction Documents** is for completeness, good practices, compliance with legal requirements for bid packaging, conformance with Standard Conditions of Contract and review of proposed Special Conditions

## **ROLE IN CONSTRUCTION PHASE OF THE PROJECT**

1. Project Oversight – The Big Picture
2. Facilitator for Conflict Management, Dispute Resolution and Problem Solving
3. Troubleshooting to Avoid and Minimize Co-Owner Liability

---

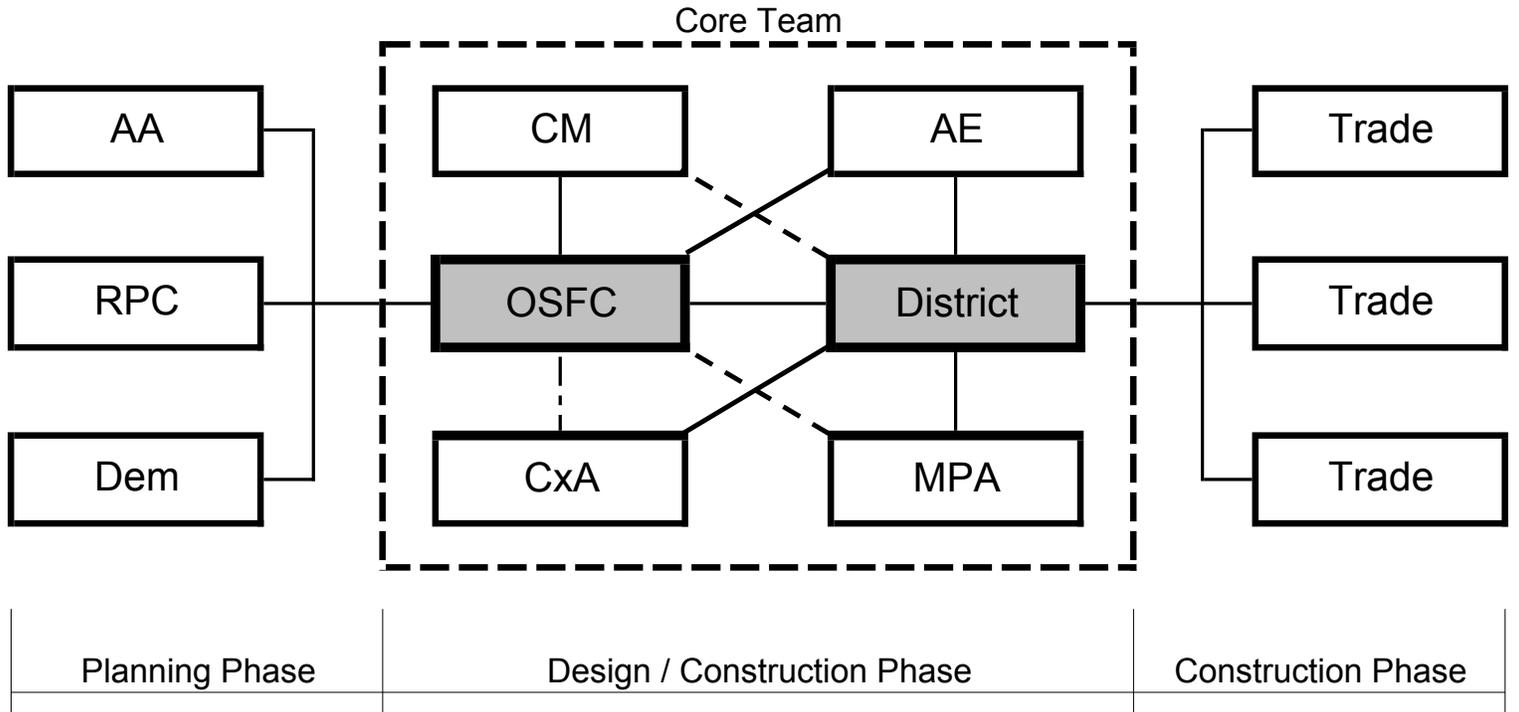
---

# OHIO SCHOOL FACILITIES COMMISSION

## Contracting Structure

---

---



CM = Construction Manager  
AE = Architect / Engineering Firm  
AA = Assessing Architect  
RPC = Regional Program Consultant  
DEM = Demographer (Enrollment Projections)  
CxA = Commission Agent  
MPA = Maintenance Plan Advisor

---

---

# Ohio School Facilities Commission

## Financial Tracking & Reporting Requirements

---

---

The following document briefly reviews the financial reporting requirements as well as some of the other important policies and issues related to participating in OSFC funded programs.

It is important to note that the financial accountability requirements for OSFC programs are relatively high. This is because both the scale of the projects and the nature of the legal partnership between the OSFC and the local school district are significantly different than under any previous program.

### **The Project Construction Fund**

At the heart of the legal partnership mentioned above, are the respective funding contributions of the state and the school district. After negotiating the school district's master plan, receiving voter approval (if necessary), and securing local funding (either through a conventional bond issue or some other source of local moneys), one of the first things that a school district treasurer will need to do is to create the Project Construction Fund (Fund 010), using special cost centers to distinguish between the local and state shares.

The Project Construction Fund will be administered by the school district treasurer and will receive all the construction revenues for the project. There are four specific revenue streams that must be accounted for and individually tracked by the school district:

1. Local Revenue (through bonds or cash from other local sources) – The project agreement specifies that bond or note proceeds be deposited in the project construction fund within thirty days of sale so as to maximize local interest earnings. If a school district is not issuing debt to fund its portion of the project, whatever local funding it is providing should be deposited in the project construction fund as soon as possible.
2. Interest on Local Funds – This is the interest earnings from the investment of local moneys deposited in the local share Project Construction Fund.
3. State Revenue – Commonly received through what are referred to as “drawdowns,” this is the state moneys allocated to the school district quarterly and are based on the cash flow needs of the project.
4. Interest on State Funds – This is the interest earnings from the investment of state moneys received and held in the state share Project Construction Fund.

All of these revenue streams must be deposited into the Project Construction Fund and tracked separately, using special cost centers.

### **Maintenance Fund**

The other major revenue stream that the school district must track comes from the proceeds of the one half mill levy for maintenance (or its equivalent). A separate maintenance fund (Fund 034) must be created to hold the revenue from the required half mill levy or its equivalent as permitted under existing law. District maintenance funds from Fund 034 may not be spent until such time as either an interim or permanent approved maintenance plan for the district's facilities is in place, with the exception of auditor/treasurer fees charged for the collection

of the half mill levy. In developing a maintenance plan, districts may contract with maintenance plan advisors using proceeds from Fund 034.

### **Accounting Requirements**

The Auditor of State Bulletins 2001-7 and 1999-04 address the Uniform School Accounting System (USAS) codes and procedures for accounting for the project. The OSFC provides annual training for treasurers and on-going support through the duration of the project.

By establishing the above funds and satisfying the basic accounting requirements, both the state and the school district will be able to answer such questions as how much state, local, and interest revenue is in the fund. The ability to track these revenues and expenditures will be of particular importance at the time of project close-out.

### **Fund Management – Key Principles**

While the Auditor of State's bulletins outline the accounting requirements, some flexibility is permitted in meeting these requirements. The school district is thus advised to account for the funds in a way that is not only permitted but makes the most sense to them. For example, some districts choose to establish a separate bank account for the construction fund. OSFC strongly urges the use of operational unit codes if there are multiple buildings in the scope of the project. Whatever accounting procedures the district employs they must satisfy the generally accepted accounting principles and audit requirements regarding the tracking of revenues and expenditures.

*Principle #1: State money should be spent first:* This provides for maximum investment opportunities for the local share funds, which when the project is closed will be transferred to the Maintenance Fund, unless needed for budget overruns. An exception to the requirement that state money be spent first is that the school district may spend whatever amounts are necessary from local bond proceeds in order to satisfy Federal Arbitrage requirements. School district bond counsel should discuss with you the details of these requirements and all other aspects of your bond sale.

*Principle #2: Any and All Expenditures from the Project Construction Fund Require OSFC Approval:* The OSFC must ensure that all moneys in the Project Construction Fund, including interest earnings, remain in the fund until such time that the project is completed, any cost overruns have been addressed, and all disputes have been resolved. The OSFC must ensure that all expenditures can be properly linked to the scope of the project budget. The construction manager (CM) and project administrator assigned to your project, and OSFC finance staff will assist the district as questions arise.

*Principle #3: Proportionality:* The so-called "Principle of Proportionality" applies to the disposition of state and local funds in the event that a project does not come in exactly on budget. Specifically, if there are funds remaining in the project construction fund (not including interest earnings) at the close of the project, those moneys must be divided between the school district and the state in the same percentages established in the project agreement. Moneys returned to the school district are to be used in accordance with the requirements of the bond issue, bond documents, and state law (normally these funds are applied to retire the local debt), while funds that are returned to the state are allocated to other school district projects.

## **Other Specifics Regarding Proportionality**

*Proportionality and Disposition of Excess Interest Earnings:* Any interest that accrues on the state share that remains in the Project Construction Fund at the end of the project will be returned to the state. Any interest that accrues on the local share will be retained by the school district and must be transferred to the Maintenance Fund to augment the proceeds of the required one half mill levy.

*Proportionality and Need for Additional Funds:* In the event that all state, local, contingency, and interest moneys from the Project Construction Fund are exhausted, and additional funds are required in order to complete the scope of the original project, or if there is an OSFC approved increase in the scope of the project, the additional cost will be shared by the state and local school district in proportion to their original contribution to the project (i.e. for a school district with a 14 percent local share, an increase of \$1 million would require the state to provide an additional \$860,000 while the school district would have to provide an additional \$140,000).

## **Other Issues and Items**

Below are a few other issues that are relative to participating in the Classroom Facilities Assistance program.

*Land Acquisition:* The acquisition of real property for construction shall not be funded by the state but shall instead be funded entirely by the school district. Any moneys intended for the purchase of land are to be accounted for separately and deposited in Fund 004 if the proceeds are from a bond issue or in another appropriate local fund.

*Spending Schedule:* The school district will receive state funds on a quarterly basis. The construction manager (CM) will develop a spending schedule that covers the projected timeline of the project and that also takes into account local arbitrage and cash flow needs. This schedule will track expenditures and revenues to the fund and the state and local shares of each. Payments to the CM will be made directly by OSFC. The cash flow schedule will be revised quarterly by your CM and the OSFC to reflect the most up to date needs of the project.

*Retainage Escrow:* In addition to the Project Construction and Maintenance Funds, the school district is required to establish an escrow account(s) with a bank in the state of Ohio. As soon as possible after entering into a construction contract, the district should provide an escrow agreement to the contractor for execution. It is the district treasurer's discretion whether an escrow account is established for each contractor or one general escrow account. If one general escrow account is established, the treasurer must maintain a record of interest due each contractor. Retainage is money held back until the project is completed to ensure that contractors maintain a vested interest. Retainage is to be withheld on eight percent of labor during the first fifty percent of the contract price. These funds shall be deposited in the escrow account and released (along with any interest) to the contractor upon final acceptance of the project. The school district may release a portion of the retainage, upon the request of the contractor, while withholding only that amount deemed necessary to assure completion of the project.

*Locally Funded Initiatives:* A locally funded initiative is a scope of work that a school district has elected to fund separately from the projects co-funded by the state. The school district assumes all financial responsibility for the locally funded initiative and that portion of any project is not subject to OSFC approval. Financial transactions for the locally funded initiative are recorded in either a building fund 004 or a permanent improvement fund 003, using special cost centers, depending upon the source of the funds, (i.e., bond issue proceeds, permanent improvement levy or funds on hand). Moneys supporting the locally funded initiative are

not to be deposited in the Project Construction Fund. OSFC however, will approve contracts and change orders that incorporate work related to the locally funded initiative, as long as the financial accounting of the moneys to fund it are maintained separate and distinct from the project funded through the Commission.

*Reconciliation:* It is important to the success of the project that the district treasurer and the CM reconcile the accounting transactions quarterly, at a minimum. OSFC recommends that the parties exchange financial transactions on a monthly basis and a full reconciliation be completed quarterly. In addition to the monthly expenditures, the treasurer should provide the interest earnings and drawdowns received. Likewise, the CM should report the payments received directly from OSFC during the month to the district, as the treasurer is required to record, by way a memo entries, the payments made to the CM within the state project fund.

*Formal Closeout:* OSFC has developed and continues to modify project closeout procedures. The District will be informed of those requirements toward the end of construction. Once a project is completed, the goal is to move quickly to close out the project and move on.

The above is intended as a basic overview of the funding procedures and financial reporting requirements. As questions come up during the course of a project, OSFC project administrators and your construction manager will assist you. Lois Snyder, Deputy Chief of Finance is the Treasurer contact at OSFC and may be contacted at (614) 995-4552 for answers to specific project accounting questions.

---

---

# Partnering

---

---

*(From the standard Project Agreement)*

## **4.4 PARTNERING**

- 4.4.1 In order to most effectively and efficiently accomplish the construction of the Project, the School District Board and the Commission encourage the formation of a cohesive, mutually beneficial partnering arrangement among all Contractors, the School District Board, the Commission, the Architect and the Construction Manager. Such an arrangement will strive to draw on the strengths, skills, and knowledge of each of the entities in an effort to achieve a quality Project, within budget, and on schedule.
- 4.4.2 The purpose of the partnering arrangement is to build cooperative relationships between such persons and avoid or minimize disputes and to nurture a more collaborative ethic characterized by trust, cooperation and teamwork. It is intended that this arrangement be a voluntary, non-binding, but formally structured arrangement among the entities, leading to an attitude that fosters risk sharing.
- 4.4.3 To create and implement the partnering arrangement, all such persons shall meet for the purpose of developing a partnering agreement. The agreement shall identify common goals and objectives, develop a problem solution and dispute resolution strategy, and an implementation plan.
- 4.4.4 Formal contractual relations, responsibilities and liabilities shall not be affected by any partnering agreement. Any cost associated with effectuating partnering or the partnering arrangement will be agreed to among such persons and will be shared equally with no change in Contract price.

---

---

## Definition of a Construction Manager

---

---

*(From the Ohio Revised Code)*

**§ 9.33. Definitions** - As used in sections 9.33 to 9.333 [9.33.3] of the Revised Code:

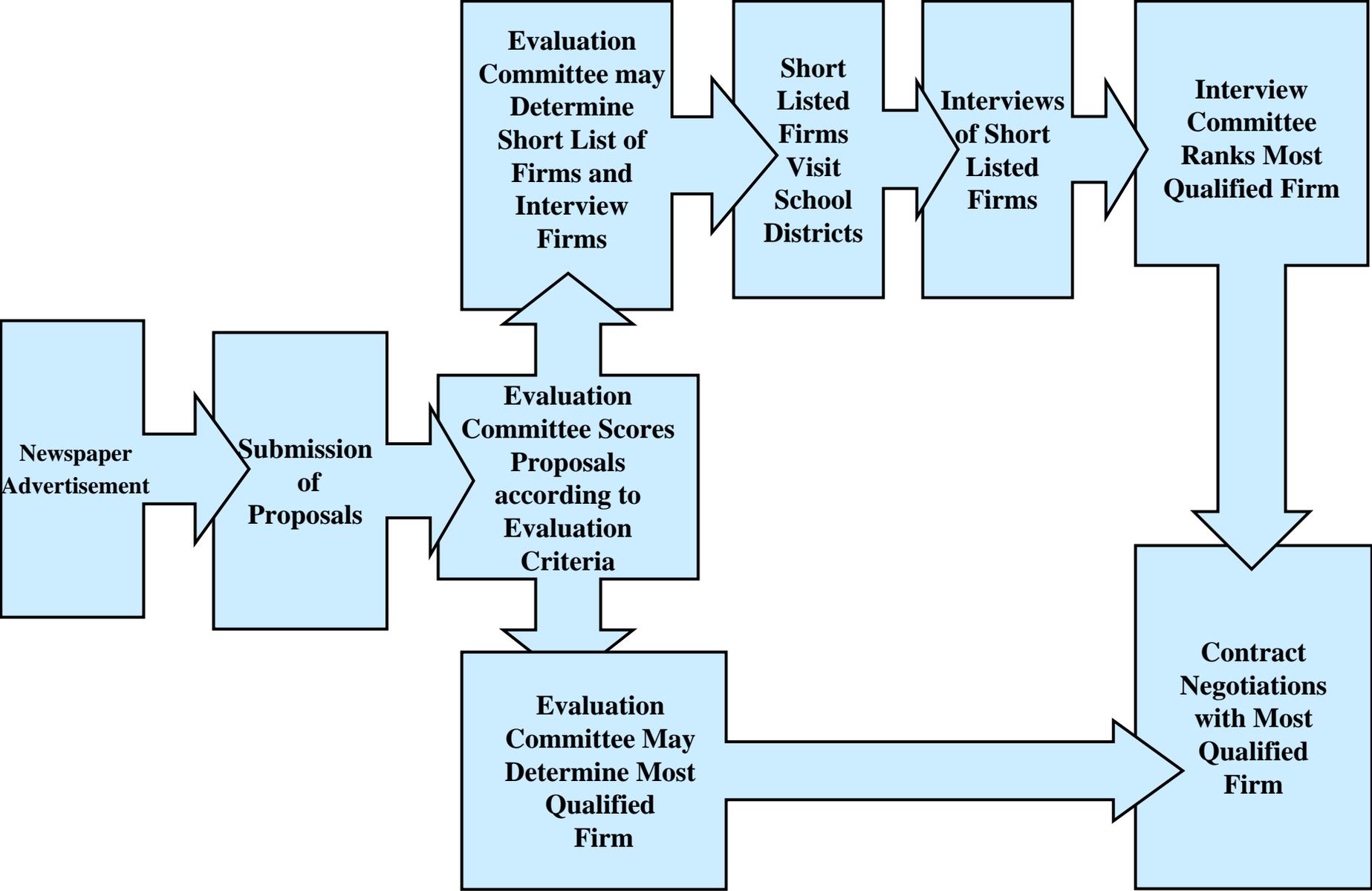
(A) "Construction manager" means a person with substantial discretion and authority to plan, coordinate, manage, and direct all phases of a project for the construction, demolition, alteration, repair, or reconstruction of any public building, structure, or other improvement, but does not mean the person who provides the professional design services or who actually performs the construction, demolition, alteration, repair, or reconstruction work on the project.

(B) "Qualified" means having the following qualifications:

- (1) Competence to perform the required management services as indicated by the technical training, education, and experience of the construction manager's personnel, especially the technical training, education, and experience of the construction manager's employees who would be assigned to perform the services;
- (2) Ability in terms of workload and the availability of qualified personnel, equipment, and facilities to perform the required management services competently and expeditiously;
- (3) Past performance as reflected by the evaluations of previous clients with respect to factors such as control of costs, quality of work, and meeting of deadlines;
- (4) Financial responsibility as evidenced by the capability to provide a letter of credit pursuant to [Chapter 1305](#) of the Revised Code, a surety bond, certified check, or cashier's check in an amount equal to the value of the construction management contract, or by other means acceptable to the public owner;
- (5) Other similar factors.

(C) "Public owner" means the state, or any county, township, municipal corporation, school district, or other political subdivision, or any instrumentality or special purpose district of the state or a political subdivision.

# CM SELECTION PROCESS



THE OHIO SCHOOL FACILITIES COMMISSION

PUBLIC ADVERTISEMENT

---

---

REQUEST FOR CONSTRUCTION MANAGEMENT SERVICES

---

---

The Ohio School Facilities Commission (Commission), 10 West Broad St., Suite 1400, Columbus, Ohio, 43215, intends to employ Construction Managers for the Commission's school facilities projects. Firms interested in being considered for a contract to provide the required services are to provide a proposal for consideration by **Friday, July 20, 2007**. Firms are encouraged to include the participation of EDGE business enterprises in proposals for the work.

The attached list of districts or groups of districts have been or will be offered state funding this fiscal year. No additional districts will be added to the list, however a district may be removed from the list should they inform the Commission they will defer participation. Updates to the Project List will be posted on the website as information is available.

A **Pre-Proposal Conference** will be held on **Friday, June 29, 2007 from 2 p.m. – 4 p.m.** at the Ohio Department of Agriculture, 8995 East Main Street, Reynoldsburg, Ohio. Individuals and firms may elect to attend the Pre-Proposal Conference, where questions about the requirements of this announcement and the required services will be addressed. The Commission requests individuals planning to attend the Pre-Proposal Conference to register online at: <http://forms.osfc.state.oh.us/preProposal/> Minutes of the Pre-Proposal Conference will be posted on the Commission's website.

Proposals should include the names of the firm owners; number of years in business and firm history; office locations, and specifically the address of offices located within Ohio; the education and experience of the Construction Manager's personnel, especially the technical training, education, and experience of the employees who would be assigned to perform the services; availability of staff in terms of workload; current or ongoing projects, specifically distinguishing whether the firm is providing, or provided, construction management services or general construction services; and references.

The evaluation of the statement of qualifications will be based primarily, but not exclusively, on the following: (1) competence of the construction management firm to perform the required management services, as indicated by the technical training, education and experience of the firm's personnel who would be assigned to perform the services; (2) ability in terms of workload and availability of qualified personnel, equipment, and facilities to perform the required management services competently and expeditiously; (3) past performance as reflected by the evaluations of previous clients with respect to factors such as control of costs, quality of work, and meeting of deadlines; and (4) other similar factors. The format of the statement of qualifications is within the discretion of the firm.

The Commission will evaluate the proposals submitted and identify no fewer than three (3) construction management firms that it considers to be qualified to provide the required services for a specific project or group of projects. The Commission intends to interview the identified construction management firms to further explore their proposal, the scope and nature of the services they would provide, and the various technical approaches they may take regarding the project. The estimated timeline for interviews is September 10 – 14, 2007.

Following this evaluation, the Commission will rank one construction management firm that it considers as most qualified to provide the required services for the project. The Commission reserves the right to terminate negotiations with a construction management firm ranked most qualified upon failure to negotiate a contract and enter into negotiations with the construction management firm ranked next most qualified.

**Three (3) individually bound copies** of the Construction Manager's proposal are to be provided for each project or each group of projects the construction management firm desires to be considered to provide services. Proposals shall be submitted to Michael Shoemaker, Executive Director, Ohio School Facilities Commission, Attn: Jill Hoobler, 10 West Broad St., Suite 1400, Columbus, Ohio, 43215. The construction management firm should indicate which project or group of projects a proposal is intended to be submitted for consideration in a cover letter with the proposals. Firms are requested to clearly

---

---

THE OHIO SCHOOL FACILITIES COMMISSION  
10 WEST BROAD STREET – SUITE 1400  
COLUMBUS, OHIO 43215

indicate the firm name, address, contact person, and contact person's phone number/fax number/email address in order to receive information from the Commission about the selection process.

Services will be provided in accordance with a standard form of agreement from the programming phase of the project through construction completion. The form of agreement is available at <ftp://osfc.ohio.gov/CMFiles/Agreements/>. An important term of the contract is that the Construction Manager and any consultants employed by the Construction Manager shall abstain from participation, either directly or indirectly, in any construction related contract let in association with the Commission. Contract negotiations with the selected Construction Manager are contingent upon the school district raising the local share of the project budget within the time period specified by law.

The agreement provides for three categories of compensation: 1) Direct labor costs and fringes for approved personnel; 2) Reimbursable expenses as defined in the Agreement; and 3) Basic Fee covering home office overhead and profit. The Basic Fee portion of compensation is being defined by the Commission as a condition of the proposal submittal process. The Basic Fee portion of compensation shall be 2% of the construction budget as determined at the time of entering into the Agreement, with no representation that additional Basic Fee will be approved if the construction budget changes.

All professionals who submit or intend to submit a proposal for consideration of a contract for professional services with the Commission are reminded that the Commission may not contract through a competitive selection process with an individual, firm, partnership, corporation, business trust, or professional association, whose proprietor, partner or other principal or spouse thereof, or if a corporation, a shareholder of more than 20% of the firm, or the spouse of such shareholder, has made as an individual at any time within the two previous calendar years, one or more contributions totaling in excess of \$1,000.00 to the Governor or to the Governor's campaign committee, consistent with Section 3517.13 of the Ohio Revised Code.

All questions regarding this request for construction management services are to be submitted in writing (absolutely no answers will be provided to phone inquiries) to the attention of Jill Hoobler at [jill.hoobler@osfc.state.oh.us](mailto:jill.hoobler@osfc.state.oh.us). The Commission will compile each question and answer them at the Pre-Proposal Conference and thereafter post minutes of the Pre-Proposal Conference on the Commission's website. The name of the party submitting a question will not be included on the list posted by the Commission. After the date of the Pre-Proposal Conference, questions will be answered and posted on a regular basis until the time of proposal submittal.

**Ohio School Facilities Commission**  
**FY08 District Project List**

<i>Group</i>	<i>District</i>	<i>County</i>	<i>Estimated Construction Cost</i>
<b>1</b>	Pike-Delta-York Local	Fulton	\$17,000,000
	Liberty Center Local	Henry	\$17,100,000
	Crestview Local	Van Wert	\$8,000,000
	Kalida Local	Putnam	\$9,200,000
			\$51,300,000
<b>2</b>	Clyde-Green Springs EV	Sandusky	\$43,000,000
	Lakota Local	Sandusky	\$23,500,000
			\$66,500,000
<b>3</b>	St. Marys City	Auglaize	\$40,400,000
	Wapakoneta City	Auglaize	\$38,200,000
			\$78,600,000
<b>4</b>	Arlington Local	Hancock	\$18,500,000
	Hardin Northern Local	Hardin	\$10,000,000
	Kenton City	Hardin	\$48,900,000
	Ridgemont Local	Hardin	\$12,400,000
			\$89,800,000
<b>5</b>	Pioneer Career JVS	Richland	\$19,100,000
<b>6</b>	Northmor Local	Morrow	\$26,900,000
	Highland Local	Morrow	\$37,200,000
			\$64,100,000
<b>7</b>	Arcanum Butler Local	Darke	\$21,600,000
	Franklin-Monroe Local	Darke	\$20,000,000
	National Trail Local	Preble	\$10,100,000
	Hardin-Houston Local	Shelby	\$18,900,000
	Newton Local	Miami	\$14,700,000
			\$85,300,000
<b>8</b>	Hamilton City	Butler	\$133,400,000
<b>9</b>	Madison Local	Butler	\$14,700,000
	North College Hill City	Hamilton	\$31,900,000
			\$46,600,000
<b>10</b>	Clay Local	Scioto	\$17,000,000
<b>11</b>	Madison Local	Lake	\$64,400,000

<b>12</b>	Elyria City	Lorain	\$47,800,000
<b>13</b>	Barberton City Rittman EV	Summit Wayne	\$59,200,000 \$11,100,000 <hr/> \$70,300,000
<b>14</b>	Springfield Local Brookfield Local	Mahoning Trumbull	\$25,000,000 \$26,400,000 <hr/> \$51,400,000
<b>15</b>	Strasburg-Franklin Carrolton EV	Tuscarawas Carrol	\$10,700,000 \$59,100,000 <hr/> \$69,800,000
<b>16</b>	Lorain City (Phase 2)	Lorain	\$75,000,000
<b>17</b>	Akron City (Segment 3)	Summit	\$104,700,000
<b>18</b>	Dayton (Segment 3)	Montgomery	\$148,400,000

## FY'08 District Information

District	County	Architect	Total Project Cost	Scope of Project
Arcanum Butler Local	Darke	Fanning/Howey	\$25,594,284	Build one new K thru 12 facility to house grades K thru 12; allowance to abate and demolish Arcanum Elementary School, Butler Middle School and Arcanum High School.
Arlington Local	Hancock	Fanning/Howey	\$22,148,877	Build one new PK thru 12 facility to house grades PK thru 12; allowance to abate and demolish the 1923 Original Arlington School, Auditorium & Board Offices, 1949 Gymnasium Expansion, 1959 West Classroom and 1978 North Addition of Arlington High School. No action required for the 1992 South Addition of Arlington High School as the district will utilize for other than PK thru 12 instruction.
Barberton City	Summit	DiMaio	\$77,054,824	Build one new elementary school to house grades PK thru 4 and one new middle school to house grades 5 thru 8; renovations to Woodford Elementary School and UL Light Middle School to house grades PK thru 4 and Barberton High School to house grades 9 thru 12 & Career Tech students; renovations/additions to Johnson Elementary School to house grades PK thru 4; allowance to abate and demolish Memorial, Portage and Santrock elementary schools, Highland Middle School and Decker Family Development Center. (The district project total includes an ELPP credit in the amount of \$4,751,403).
Brookfield Local	Trumbull	GPD Group	\$31,418,701	Build one new K thru 12 facility to house grades K thru 12; allowance to abate and demolish Addison and Stevenson elementary schools, Brookfield Middle School, and Brookfield High School; abandon Brookfield Elementary School (as it is located in Pennsylvania).
Carrollton EV	Carroll	Marr, Knapp & Crawfis	\$71,542,107	Build two new elementary schools (one to house grades PK thru 2 and one to house grades 3 thru 5), one new middle school to house grades 6 thru 8 and one new high school to house grades 9 thru 12; allowance to abate and demolish Augusta, Delroy, Harlem Springs, Kilgore and Willis elementary schools, Bell-Heron Middle School and Carrollton Elementary/High School.
Clay Local	Scioto	Tanner Stone	\$20,072,901	Build one new K thru 12 facility to house grades K thru 12; allowance to abate and demolish Rosemont Primary School, Rubyville Elementary School and Clay Jr/Sr High School.
Clyde-Green Springs EV	Sandusky	Not Yet Selected	\$54,044,928	Build one new elementary school to house grades K thru 5 and one new middle school to house grades 6 thru 8; renovations/additions to South Main Elementary School to house grades K thru 3; renovations/additions to Clyde High School to house grades 9 thru 12; allowance to abate and demolish Green Springs and Vine Street elementary schools and McPherson Middle School.
Crestview Local	Van Wert	Garmann Miller	\$11,835,182	Renovations to Crestview Combination School to house grades K thru 12 and Career Tech students.
Elyria City	Lorain	AVG Architects	\$55,443,850	Renovations/additions to the 1894 building of Elyria High School to house grades 9 thru 12 (Cascade, Crestwood, Eastgate, Ely, Erie, Franklin, McKinley, Oakwood, Prospect, Roosevelt and Windsor elementary schools and Eastern Heights, Northwood and Westwood Jr High schools are not part of this Exceptional Needs plan). Non optional allowance to abate and demolish the 1929 Technical Building, 1929 Boiler Area, 1929 Tunnels, 1954 Lincoln Building, 1955 Auditorium, 1967 Detached and the 1967 Industrial Building of Elyria High School.

## FY'08 District Information

District	County	Architect	Total Project Cost	Scope of Project
Franklin Monroe	Darke	Steed Hammond Paul	\$23,791,412	Build one new K thru 12 facility to house grade K thru 12 and Career Tech students; allowance to abate and demolish Franklin Monroe Elementary School and Franklin Monroe High School.
Hamilton City	Butler	Steed Hammond Paul	\$209,816,144	Build eight new elementary schools to house grades PK thru 6; renovations/additions to Hamilton High School to house grades 10 thru 12 and Career Tech students; renovations to Garfield Jr. High School to house grades PK thru 6; allowance to abate and demolish Adams, Buchanan, Cleveland, Filmore, Grant, Harrison, Hayes, Jefferson, Lincoln, Madison, McKinley, Monroe, Pierce, VanBuren elementary schools and Washington Jr. High School. (The district project total includes an ELPP credit of \$48,235,331).
Hardin-Houston Local	Shelby	Freytag & Associates	\$23,024,191	School and Houston High School.
Hardin Northern Local	Hardin	McDonald Cassel & Basset	\$12,512,635	Renovations/additions to Hardin Northern K thru 12 facility to house grades K thru 12 and Career Tech students.
Highland Local	Morrow	MSA/Burkett Design	\$46,432,042	Build one new high school to house grades 9 thru 12 & Career Tech students; renovations/additions to Central Elementary/Highland Middle School to house grades K thru 5; renovations to Highland High School to house grades 6 thru 8; allowance to abate and demolish Highland North and Highland West elementary schools. No action required for the 2001 Slack Technology Center portion of Highland Middle School as the district will utilize for other than K thru 12 instruction.
Kalida Local	Putnam	Beilharz Architects	\$17,577,236	Addition to the existing 7 thru 12 facility to house grades K thru 12; allowance to abate and demolish Kalida High School. No action required at Kalida Elementary School as this facility is not owned by the district. (The district project total includes an ELPP credit of \$6,577,139).
Kenton City	Hardin	Garmann Miller	\$59,149,648	Build one elementary school to house grades PK thru 5 and one new middle/high school to house grades 6 thru 12; allowance to abate and demolish Westview, Eastcrest, Espy, Hardin Central and Northwood elementary schools, Kenton Middle School and Kenton High School. No action required at Oaklief Elementary School as the district will utilize for other than PK thru 12 instruction.
Lakota Local	Sandusky	Garmann Miller	\$28,928,094	Build one new PK thru 12 facility to house grades PK thru 12; allowance to abate and demolish Lakota Central, Lakota East and Lakota West elementary schools, Lakota Jr High School and Lakota High School.
Liberty Center Local	Henry	Garmann Miller	\$26,938,798	Build one new elementary/middle school to house grades K thru 8; renovations/additions to Liberty Center School to house grades 9 thru 12; non-optional allowance to abate and demolish the 1963 Original, 1960 & 1971 elementary classrooms and the 1974 auditorium, board offices, high school addition & Vo-Ag workshop.
Madison Local	Butler	Cole Russel/Fanning Howey	\$30,218,536	Additions to Madison Jr/Sr High School to house grades 7 thru 12; allowance to abate and demolish Madison Middle School and Madison High School. (The district project total includes an ELPP credit in the amount of \$12,629,498).
Madison Local	Lake	Fanning/Howey - Olshavky/Jaminet	\$77,425,746	Build one new elementary/middle school to house grades PK thru 8; renovations/additions to Madison High School to house grades 9 thru 12; allowance to abate and demolish Homer Nash, North Madison and Red Bird elementary schools, Madison Middle School and the Memorial Complex.

## FY'08 District Information

District	County	Architect	Total Project Cost	Scope of Project
National Trail	Preble	Steed Hammond Paul	\$11,667,927	Renovations to the high school portion of National Trail K thru 12 facility to house grades 9 thru 12. No action required for the elementary/middle school portion as this was built under the 1990 Building Assistance Program.
Newton Local	Miami	Fanning/Howey	\$17,411,129	Build one new K thru 12 facility to house grades K thru 12; allowance to abate and demolish Newton K thru 12 facility.
North College Hill City	Hamilton	SFA Architects	\$38,259,764	Build one new elementary school to house grades PK thru 4; renovations/additions to the 1932 Auditorium section of North College Hill High School to house grades 5 thru 12; non-optional allowance to abate and demolish the 1930 Original Middle, 1932 Original High, 1951 Classroom Addition, 1956 Art/Music/Shop Addition, 1970 Gymnasium and the 2000 Elevator; allowance to abate and demolish Becker, Clovernook and Goodman elementary schools.
Northmor Local	Morrow	MKC Architects	\$32,399,856	Build one new K thru 12 facility to house grades K thru 12; allowance to abate and demolish Iberia and Johnsville elementary schools and Northmor Jr/Sr High School.
Pike Delta York Local	Fulton	Fanning/Howey	\$21,742,852	Build one new elementary school to house grades PK thru 4; renovations to Pike-Delta-York Middle School to house grades 5 thru 8; renovations to Pike-Delta-York High School to house grades 9 thru 12 and Career Tech students; allowance to abate and demolish Delta and York Elementary School. (The district project total includes an ELPP credit in the amount of \$451,618).
Pioneer	Richland	Steed Hammond Paul	\$24,923,212	Renovate the existing Pioneer Career Tech Facility to house 887 students.
Ridgemont Local	Hardin	Steed Hammond Paul	\$14,919,386	Build one new elementary school to house grades PK thru 6; renovations to Ridgemont High School to house grades 7 thru 12; allowance to abate and demolish Ridgemont Elementary School.
Rittman EV	Wayne	MKC Architects	\$21,711,224	Renovations/additions to Rittman High School to house grades 5 thru 12; allowance to abate and demolish North Street Elementary School and Rittman Middle School. No action required for West Hill Elementary School as this facility was built under the Expedited Local Partnership Program. (The district project total includes an ELPP credit in the amount of \$8,332,718).
Springfield Local	Mahoning	Olsavsky Jaminet	\$30,250,448	Build one new middle/high school to house grades 7 thru 12; renovations/additions to Springfield Intermediate/High School to house grades K thru 6; non-optional allowance to abate and demolish the 1967 Original & District Administrative Offices, 1990 Addition and 1995 Bridge Infill at Springfield Local High School/Intermediate School; allowance to abate and demolish Springfield Elementary.
St. Marys City	Auglaize	Fanning/Howey	\$48,331,102	Build one new middle/high school to house grades 6 thru 12 and Career Tech students; renovations to East Elementary School to house grades PK thru 5 and Dennings Vocational School to house 222 Career Tech students; renovations/additions to West Elementary School to house grades 1 thru 5; non-optional allowance to abate and demolish all high school portions of Memorial High, excluding Dennings Vocational portions; allowance to abate and demolish McBroom Junior High School.

## FY'08 District Information

District	County	Architect	Total Project Cost	Scope of Project
Strasburg Franklin Local	Tuscarawas	MKC Architects	\$19,553,595	Addition to the existing K thru 2 facility to house grades K thru 12; allowance to abate and demolish Strasburg Franklin Elementary and Strasburg Franklin High schools. No action required for the K thru 2 section (41,839 sf) as this was built under the Expedited Local Partnership Program. (The district project total includes an ELPP credit in the amount of \$6,555,938).
Wapakoneta City	Auglaize	Garmann Miller	\$50,236,390	Build two new elementary schools to house grades PK thru 4; renovations/additions to Wapakoneta Middle School to house grades 5 thru 7; renovations to Wapakoneta High School to house grades 8 thru 12 and Career Tech students; allowance to abate and demolish Centennial, Cridersville and Northridge elementary schools. (The district project total includes an ELPP credit of \$2,621,005).

**DAYTON CONSTRUCTION MANAGEMENT SERVICES 2007  
QUESTION AND ANSWER LIST**

Date Posted: July 25, 2007

Updated: August 1, 2007

- Q. Why has the deadline been extended for Dayton schools? Are you looking for CM's who didn't submit on this grouping to submit?
- A. The deadline for submitting proposals for Group 18 (Dayton Public Schools) was extended to allow more time for companies interested in submitting on the project to do so. This opportunity is open to all firms.**
- Q. On Segment 2, what is the value (construction cost) of the 8 schools which are scheduled for completion in 2008 (6 K-8, 2 HS)? Is it anticipated that, #4) Field Oversight, will transition by December 31, 2007? How long will the current CM field personnel be on the project sites?
- A. The construction cost budget for the Segment 2 projects scheduled to be completed in 2008 (6 K-8, 2 HS) is approximately \$97,500,000. Field supervision responsibility will transition for all Segment 2 projects (except Thurgood Marshall HS) on October 31, 2007. Thurgood Marshall HS is scheduled to be occupied in December. Transition of any needed field supervision for Thurgood Marshall HS after December would occur on December 31, 2007. Once these transitions occur on these dates, the current CM field personnel will no longer be on those project sites. Program management personnel from the current CM team for Segment 2 & 3 will be assisting the transition of the new CM team through December 31, 2007.**

**OHIO SCHOOL FACILITIES COMMISSION  
Construction Manager Proposal  
Evaluation Form**

**CM Firm:** \_\_\_\_\_

**Group:** \_\_\_\_\_

**Evaluator's Name:** \_\_\_\_\_

		VALUE	SCORE
<b>A. PROFILE - STAFF ASSIGNMENTS</b>  55 Points	Executive	10	
	Project Manager	10	
	Team Organization	5	
	Scheduling	5	
	Design Manual Review Staff	10	
	Information Management Staff	5	
	Availability of Staff (depth)	5	
	Participation of EDGE business enterprises	5	
<b>B. ABILITY TO PROVIDE QUALITY ADMINISTRATION</b> 20 Points	Knowledge of OSFC Policies and Procedures	10	
	Understanding School Construction and Public Owners Requirements	10	
<b>C. CM's PAST PERFORMANCE</b> 25 Points	Performance Evaluations	10	
	Problem Solving and Dispute Resolution	10	
	Web base Project Management Experience or OSFC Website Maintenance	5	
<b>TOTAL SCORE:</b>		<b>100</b>	

**Comments:**

---



---



---



---



---



---



Ted Strickland, Governor

Michael Shoemaker, Executive Director

Commission Members:

J. Pari Sabety, Office of Budget & Management  
Susan Tave Zelman, Ohio Department of Education  
Hugh Quill, Department of Administrative Services

Senator Larry Mumper  
Senator Tom Roberts  
Representative Clyde Evans  
Representative Matthew A. Szollosi

***Ohio School Facilities Commission  
FY '08 Construction Manager Services Selection Process***

***SHORT LIST***

**Group 1 - Pike-Delta-York LSD, Liberty Center LSD, Crestview LSD and Kalida LSD**

- a. Bostleman + G. Stephens
- b. Dick Corporation & R.J. Runge Company, Inc.
- c. Richard L. Bowen + Associates Inc.
- d. URS Corporation

**Group 2 – Clyde-Green Springs EVSD and Lakota LSD**

- a. Bostleman + G. Stephens
- b. Gilbane Building Company
- c. URS Corporation

**Group 3 - St. Marys CSD and Wapakoneta CSD**

- a. Gilbane Building Company
- b. Richard L. Bowen + Associates Inc.
- c. Touchstone CPM

**Group 4 - Arlington LSD, Hardin Northern LSD, Kenton CSD and Ridgemoor LSD**

- a. Gilbane Building Company and Resource International
- b. Smoot Construction, Elford and McDaniel's Construction Corporation
- c. The Quandel Group

**Group 5 - Pioneer Career JVS**

- a. Bovis Lend Lease
- b. R.P. Carbone Company
- c. Regency Construction Services, Inc.

**Group 6 - Northmor LSD and Highland LSD**

- a. Bovis Lend Lease
- b. Resource International/URS
- c. Smoot Construction and McDaniel's Construction Company
- d. The Quandel Group

**Group 7 - Arcanum Butler LSD, National Trail LSD, Hardin-Huston LSD and Newton LSD**

- a. Barton Malow
- b. Bovis Lend Lease and Bruns Wolgast, Inc.
- c. The Skillman/Wise Team
- d. The Quandel Group

**Group 8- Hamilton CSD**

- a. Dick Corporation, R.J. Runge Company, Inc. & G. Stephens Inc.
- b. The Quandel Group
- c. Turner Construction Company and Megan Construction Company

**Group 9 - Madison LSD and North College Hill CSD**

- a. Megen Construction Company
- b. The Quandel Group
- c. Turner Construction Company and DAG Construction Company

**Group 11- Madison LSD**

- a. Hammond Construction
- b. Project and Construction Services, Inc.
- c. R.P. Carbone Company
- d. Richard L. Bowen + Associates Inc.

**Group 12 - Elyria CSD**

- a. Amec E&C Services, Inc.
- b. Regency construction Services, Inc.

**Group 13 - Barberton CSD and Rittman EVSD**

- a. R.P. Carbone Company
- b. Richard L. Bowen + Associates Inc.
- c. Ruhlin/Thomarios/Jenkins

**Group 14 - Springfield LSD and Brookfield LSD**

- a. Project and Construction Services, Inc.
- b. Richard L. Bowen + Associates Inc.
- c. URS Corporation

**Group 15 - Strasburg-Franklin LSD and Carrolton EVSD**

- a. Hammond Construction
- b. R.P. Carbone Company
- c. Regency . Knoch An Association

**Group 16 - Lorain CSD - Phase 2**

- a. Hammond Construction
- b. Heery International, Inc.
- c. R.P. Carbone Company

**Group 17 - Akron CSD - Segment 3**

- a. Kenmore Construction Company, Inc., URS Corporation and G. Stephens, Inc.
- b. R.P. Carbone Company
- c. Ruhlin/Panzica/Jenkins CM Team

**Group 18 - Dayton CSD - Segment 3**

- a. Bovis Lend Lease/Bruns Wolgast
- b. Shook/Touchstone
- c. Turner Construction Company, The Quandel Group Inc and Wise Construction