

# REQUEST FOR QUALIFICATIONS AND PROPOSALS

GENERAL CONTRACTOR, CONSTRUCTION MANAGER, CONSULTANT SERVICES

PRECONSTRUCTION PHASE SERVICES  
CONSTRUCTION PHASE SERVICES

JEFFERSON HIGH SCHOOL DISTRICT  
BOULDER, MONTANA

FEBRUARY/MARCH 2022

**REQUEST FOR QUALIFICATIONS & PROPOSALS  
FOR GENERAL CONTRACTOR CONSTRUCTION MANAGER (GCCM) CONSULTANT SERVICES**

Pre-Construction and Construction Phase Services

**TO:** Prospective General Contractor Construction Manager (GCCM) Consultant Firms

**FROM:** Tim Norbeck, Superintendent  
Jefferson High School District #1  
Boulder, MT 59632

**SUBJECT:** The procurement of GCCM services by a qualified GCCM consulting firm to participate in a collaborative process to assist in the finalization and development of the design; to provide value engineering; estimating, influence the methods and sequencing of the construction phase; and participate in the construction/expansion of the Jefferson High School in Boulder, Montana.

**DATE OF ISSUE:** February 15, 2022

**Executive Summary:**

Responses to this Request for Qualifications/Proposals for GCCM Consulting Services will be received at the Office of the Superintendent, 312 South Main, Box 838, Boulder, MT 59632 until **4:00 p.m.** prevailing local time, on **March 4, 2022**

Any questions, which arise from this request, shall be addressed to:

Tim Norbeck, Superintendent  
Or Lorie Carey  
Jefferson High School District #1  
P.O. Box 838  
Boulder, MT 59632

Program clarification and additional data may be requested by appointment with the superintendent. Jefferson High School District #1 respectfully requests that interested firms limit their contacts in the interest of maintaining a consistency of response and fairness to all firms. Please make no contact with other members of the design team, including consultants, except regarding certain items as specifically directed herein by the superintendent.

An **OPTIONAL** Q &A review will be conducted of the RFQ requirements of the project held in the library at Jefferson High School located at 312 South Main Boulder, MT at 1:00 p.m., February 25,2022.

**This project is an alternative delivery method under Title 18, chapter 2, part 5, traditional bid process will not be followed.**

On February 15, 2022 at 6:30pm in the Jefferson High School Library, in compliance with Montana's Open Meeting Laws, the Jefferson High School Board of Trustees approved a motion directing the District Superintendent and Clerk to publish a request for qualifications (RFQ) according to the laws of the State of Montana for the GCCM. This request will outline the desired qualifications of the individual/firm the District is looking to provide the alternative project delivery contract. The RFQ should be published twice each week for 2 consecutive weeks, and the second publication will be made not less than 5 days or more than 12 days before consideration of the RFQ.

The design and construction of the project is to be funded by bond funds generated by the sale of bonds issued by Jefferson High School District. Jefferson High School will administer all related contracts according to the terms and conditions of the award and applicable laws and guidelines. The GCCM consultant will receive general instructions through Jefferson High School and SMA Architectural firm (SMA). SMA will be assigned to serve as the project manager and liaison with the GCCM consultant and Jefferson High School during all phases of the work. An Owners representative may be selected to assist the district.

As part of the Request for Qualification ("RFQ") response, firms shall include sub-contractor or group of sub-contractors representing mechanical, electrical, and plumbing trades that the firm proposes to partner with for this project.

The District will use the RFQ process to evaluate each of the proposers' qualifications. A subsequent Request for Proposals (RFP) will be issued to all qualified General Contractor/Construction Manager Firms, as determined by the District, who will then be required to submit detailed information regarding project-specific capabilities, experience, and costs. General Contractor/Construction Manager selection will be determined from the Proposals submitted in response to the RFP document, interviews (in the discretion of the District), and any other information sought by the District to assess a firm's ability to complete the project as anticipated.

The District envisions the process for the development of the design and the delivery of the project to be a collaborative process in which a qualified General Contractor/Construction Manager Firm will participate as a partner with the District and the other members of the design and delivery team as determined by the District.

This RFQ shall not commit the District to enter into any agreement, to pay any expenses incurred in preparation of any response to this request, or to procure or contract for any supplies, goods or services. The District reserves the right to accept or reject any or all responses received as a result of this RFQ.

This procurement is governed by the laws of the State of Montana and venue for all legal proceedings shall be the Fifth Judicial District, Jefferson County.

By offering to perform services under this procurement process, all proposers agree to be bound by the federal and state laws, rules and regulations, including but not limited to applicable prevailing wage requirements, building codes, equal opportunity employment practices, safety, open meeting laws, public records laws, etc.

Any and/or all work contemplated as described hereinbelow is contingent upon the financial capacity of the District.

#### Key Anticipated Milestones

- Issue RFQ: February 15, 2022
- RFQ Due: March 4, 2022
- Optional Q&A Session: February 25, 2022
- Interviews/Selection: March 11, 2022
- (\* Interviews may or may not occur and will be at the discretion of the District)
- Award: March 16
- Project start: March 17

*The District makes reasonable accommodations for any known disability that may interfere with an applicant's ability to compete in the bidding and/or selection process. In order for the District to make such accommodations, applicants must make known any needed accommodation to the individual project managers or agency contacts listed in the contract documents. Persons using TDD may call the Montana Relay Service at 1-800-253-4091.*

#### **Design Team:**

The design team has been selected by Jefferson High School Board of Trustees. The primary members of the design team are SMA Architects and will execute the contract and collaborate with the GCCM Consultant.

Jefferson High School will create a facility committee to assist the design team and GCCM in the development of the project.

### **Intent of RFQ/RFP:**

The intent of this solicitation is to identify qualified GCCM consultants interested in participating in a collaborative process to bring to fruition the school district's vision for the renovation and addition to Jefferson High School. The primary project consists of an addition of classrooms and learning suites, along with renovation of existing spaces with all site work necessary to improve outdoor spaces/facilities. From the list of interested and qualified GCCM firms, Jefferson High School will select the GCCM firm which is best qualified and best suits Jefferson High Schools' need and intent regarding the project. Jefferson High School intends that the selected GCCM consultant will provide both pre-construction services and construction phase services for a complete project.

### **Form of Agreement:**

It is the intention of Jefferson High School to initially enter into a contract with the selected GCCM firm using **a written contract reviewed by the school district legal counsel and approved by the Board of Trustees**. The selected GCCM firm will participate in all preconstruction and construction design activities including comment on design, value engineering, provide detailed estimating, constructability review, project schedule and phasing, subcontract availability, development of bid packages, bidding. Upon completion of preconstruction activities, the GCCM will submit a Guaranteed Maximum Price (GMP) for Jefferson High Schools' review and approval.

A contract will be executed for the GCCM services for the construction of the project to include acceptance of the GCCM GMP. At the time of execution of the construction phase contract, the GCCM will be required to submit a 100% performance bond for the completion of the project.

### **Required Services, Pre-construction Services, Construction Services:**

It is the intent of Jefferson High School District that the specific scope of pre-construction services will be negotiated prior to signing the Construction Services Agreement, based on the firm's input as well as Jefferson High Schools' requirements. In general services are anticipated to include:

1. Consult with, advise, assist, and provide recommendation on all aspects of the planning and design of the work.
2. Provide information, estimates, and participate in decisions regarding construction materials, methods, systems, phasing, and costs to assist in determinations that are aimed at providing the highest quality building within the budget and schedule.
3. Review in-progress design documents and provide input and advise on construction feasibility, alternative materials, and availability of materials and equipment. Review

completed design documents and suggest modifications to improve completeness and clarity.

4. Provide input regarding the current construction market bidding climate, status of key subcontract markets, etc. Recommend division of work to facilitate bidding and award of trade contracts, considering such factors as bidding climate, improving or accelerating construction completion, minimizing trade jurisdictional disputes, and related issues.
5. Develop and continuously monitor the project critical path method schedule and recommend adjustments in the design documents or construction bid packaging to ensure completion of the project in the most expeditious manner possible, while addressing and meeting schedule requirements. Prepare descriptions of each bid package for inclusion in the bid documents to ensure continuity and coverage of all aspects of the project.
6. Prepare construction cost estimates for the project at the conclusion of schematic design, design development and contract document phases of the work. Notify Jefferson High School District #1 and design team immediately if their construction cost estimates appear to be exceeding the construction budget or the GMP.
7. Work with Jefferson High School District #1 and design team to maximize energy efficiency in the project.
8. Furnish a Guaranteed Maximum Price (GMP) in accordance with the contract for review and approval. In the event that the GCCM is unable to furnish a GMP within the Jefferson High School District #1 budget, Jefferson High School District #1 retains the sole option to cancel the solicitation and offer the 2nd highest rated GCCM SOQ selection a contract or start a new process for the construction of the project or cancel the construction contract and award a contract for construction activities to another firm. Required Services, Construction Phase Services: Construction period services will be provided under terms of the written contract and supplemental documents.

Acceptance of the GMP by contract will constitute completion of preconstruction services and that GMP Agreement/Amendment will initiate the construction period services for the Project. At the time of execution of the GMP for construction services, the General Contractor/Construction Manager Firm will be required to submit a 100% performance and 100% payment bond for the amount of the GMP.

The District retains, in its sole discretion, the option, including but not limited to, terminate the contract after the pre-construction phase and/or start a new selection process for the construction of the Project, if the project moves forward, using the alternative delivery method or the bidding process as provided in Montana law.

## Selection Procedure / Statement of Qualifications Requirements

This RFQ is the first of a multi-part selection process. In order to qualify for further consideration, proposers must comply with the mandatory requirements provided below. Statements of Qualifications that do not contain the required documentation will be deemed nonresponsive to this RFQ requirement and will be rejected on that basis. The Request for Proposals (RFP) will be issued to all qualified General Contractor/Construction Manager Firms, as determined by the District, who will then be required to submit detailed information regarding project-specific capabilities, experience, and costs.

The District will evaluate each of the firms based on the overall merit of the written qualifications in accordance with the criteria listed below.

Non-prerequisite criteria will be rated on a scale of 0 through 10 (10 being highest rating) by the District and weighted in accordance with the importance of each item. Ratings will be determined by consensus scoring of the selection team as recommended in “Best Practices for Use of Best Value Selections,” a joint publication of the National Association of State Facilities Administrators (NASFA) and the Associated General Contractors of America (AGC).

*Firms must receive a minimum of a “6” rating in 9 and 10 below, and a minimum weighted total of 50 to be considered qualified.*

| Category   | Rating | Weight | Total Possible Score |
|--|--------|--------|----------------------|
| 1. Signature of Officer or Principal                           | ----   | ----   | Prerequisite         |
| 2. Firm Profile and Identification of Project Team             | ----   | ----   | Prerequisite         |
| 3. References  | ----   | ----   | Prerequisite         |
| 4. Local Presence  | ----   | ----   | Prerequisite         |
| 5. Bonding Capacity  | ----   | ----   | Prerequisite         |
| 6. Safety  | ----   | ----   | Prerequisite         |
| 7. MT Construction Contractor Registration                     | ----   | ----   | Prerequisite         |
| 8. List subcontractors with whom your firm proposes to partner | ----   | ----   | Prerequisite         |
| 9. General Contractor/Construction Manager Firm Information    | 0-10   | 3      | 30                   |
| 10. Specific Project Experience Information                    | 0-10   | 5      | 50                   |
|  |        | TOTAL: | 80                   |

## **Proposal Content and Instructions to Firms:**

1. Statement of Qualifications must be signed by an officer or principal of your firm. (PREREQUISITE)
2. Firm Profile and Identification of Project Team (PREREQUISITE)
  - a) Provide general information on the responding firm, including; name, business address, telephone number, officers of the firm, number of employees
  - b) Annual volume the last three years
  - c) Provide a list of the personnel to be used on their project, their responsibilities and their qualifications, and the contact person for this project.
3. References (PREREQUISITE)

The respondent shall include a reference list of at least three prior projects developed and implemented by the Project Team designated above demonstrating experience designing and constructing projects of similar scope. Their list will be used to determine the prior relevant work experience of the General Contractor/Construction Manager Firm. References shall include contact names and phone numbers. A minimum of three similar contracts must be demonstrated. References for projects where the responding firm was not the prime contractor or where a General Contractor/Construction Manager contract was not implemented are not acceptable.
4. Local Presence (PREREQUISITE)

The respondent shall provide the address and telephone number of the firm's office located nearest to the District.
5. Bonding Capacity (PREREQUISITE)
  - a) It is required that proposing firm have the bonding capacity for this project. Proposer must have a single-project bonding capacity of at least \$35 million or more depending upon the total anticipated cost of the project at the time of the RFP. Provide single-project and aggregate bonding program amount. Please note that bonding capacity is a requirement and if not met, the proposer will not be selected to move forward in the process.
  - b) In addition to bonding capacity noted above in a), please provide:
    - i. Bonding company and agent, with phone and email contact information;
    - ii. Years of relationship;
    - iii. If less than 5 years, or not your exclusive source, name all others used in the last 5 years; and
    - iv. If less than 5 years, or not your exclusive source, provide additional explanation regarding any transitions or changes.
6. Safety (PREREQUISITE)
  - a) Provide incidence rate, experience modification rate, AND loss ratio. An incidence rate greater than the latest average for non-residential building construction for Montana as established by the federal Bureau of Labor Statistics (BLS) for the prior year or an experience modification rating (EMR) greater than



- 1.0 or a loss ratio of more than 100% may result in immediate disqualification on this item.
- b) Provide your firm's number of employees for BLS's most recent reporting period and the firm's applicable NAICS code.
  - c) Proposer may submit an explanation for incident rate, EMR, and/or loss ratio greater than those listed here for further consideration by the District. The District reserves the sole right to waive the pass/fail requirement if, in the District's sole judgment, sufficient justification exists for any explanation provided. The District also reserves the right to request additional information and/or clarification on this item but is not obligated to do so prior to making its determination on whether or not to waive the requirement.
7. Include evidence of valid Montana Contractor Registration. (PREREQUISITE)
8. General Contractor/Construction Manager Firms should submit responses to this RFQ with a sub-contractor or group of sub-contractors representing architectural services, engineering services, mechanical, electrical, and plumbing trades that the firm proposes to partner with. (PREREQUISITE)
9. General Contractor/Construction Manager Firm Information:
- a) Proposer must demonstrate successful experience and capacity to act as a General Contractor/Construction Manager Firm on non-residential, renovation projects between \$10M and \$20M construction value.
  - b) Describe your firm's approach specific to Pre-Construction services, Project estimates, Project schedules, Bid Packages, and balancing value and budget to avoid value engineering (VE) efforts.
  - c) Proposer must list other projects, both private and public, that will be concurrent with the schedule stated in this RFQ for this project. Potential future workload coincident to this project's schedule is also requested.
  - d) Along with current backlog in dollars, provide workload in terms of total contract values or annual business volume for the last 3 years.
  - e) In the last five years, have you (if you answer "yes", provide full explanation):
    - i. Had an Owner claim against Performance Bond and/or initiate legal action against you?
    - ii. Been declared in default and/or terminated on a project?
    - iii. Assessed liquidated damages for delay in delivery of project?
    - iv. Taken legal action, filed liens, or dispute resolution proceedings of any kind?
10. Specific Project Experience Information:
- a) Provide a narrative of how your firm's approach to sub-contractor collaboration with the design team will bring value to the District by addressing the following:
    - i. Your firm's experience partnering with architectural, engineering, mechanical, electric, plumbing subcontractor's during the design phase of projects, i.e., preconstruction services.
    - ii. Sub-contractor ability to provide accurate cost estimates to the District at all stages of design.

- b) Provide a narrative explaining your team's ability to integrate with the BIM component of the design process as described in pre-construction services.
- c) Proposer should provide three specific project examples demonstrating experience and capacity to act as a General Contractor/Construction Manager on:
  - i. Renovations in buildings with difficult existing constraints including structural, mechanical, electrical, and plumbing limitations.
  - ii. Renovations with adjacencies to occupied space.
  - iii. New Construction.
- d) Firm Background:
  - i. What three unique approaches and practices used at your firm differentiate your firm from competitors in your ability to provide excellent service to the District.

### **Response Format and Preparation Instructions**

Responses must be submitted in the format outlined in this RFQ. Each response will be reviewed to determine if it is complete prior to actual evaluation. The District reserves the right to eliminate from further consideration any response, which is deemed to be substantially or materially unresponsive to the requests for information contained in their section. It is requested by the District that all responses follow the format in the order outlined to facilitate evaluation of each response fairly.

Eligible General Contractor/Construction Manager Firms are limited to those companies that can demonstrate successful implementation of similar projects. The contractor must also demonstrate, to the satisfaction of the District, their ability to organize, manage, and deliver a project of this type. Additional ability to manage guaranteed utility savings is required.

Statements of Qualification must be submitted with the identified information outlined in their document. Each RFQ response will be reviewed to determine if it is complete prior to actual evaluation.

Respondents shall use the prescribed format outlined in the Selection Procedure above. RFQ responses will be evaluated in light of the material and substantiating evidence presented in the proposal; not on the basis of what is inferred.

The selected contractor, if any, will be required to assume total responsibility for all services and solutions offered in its proposal, and required to meet the needs of the District through the entire project. The selected contractor will be considered the prime contractor and the sole point of contact with regard to all contractual matters.

Submission of a response grants permission to make inquiries concerning the respondent and its officers to any persons or firms deemed appropriate by the District. Any proprietary information that the contractor does not want disclosed to the public shall be so identified on

each page in which it is found. Data or information so identified will be used by the District solely for the purpose of evaluation and contract negotiations.

If your company is interested in providing a proposal or if you have any questions or requests for information, please contact the Jefferson High School District Office at 406-225-3740 or email [tim.norbeck@jhs.k12.mt.us](mailto:tim.norbeck@jhs.k12.mt.us).