

Three Forks School District #J24
Owner's Construction Representative - Request for Qualifications
Three Forks Public Schools – School Building Addition and Renovation Project

Three Forks Public Schools seeks to immediately engage the services of a firm or individual to manage, on behalf of the District, all aspects of design and construction for the successful completion of its K-12 school building addition and renovation project.

Submittal Due Date: June 30, 2020, 4:00 p.m. MST

Deliver to: Superintendent Jeff Elliott
Three Forks Public Schools
212 East Neal, Three Forks, MT 59752
(406) 285-6380
jelliott@threeforks.k12.mt.us

Delivery Requirements: Deliver 1 electronic copy via email + 1 Physical Original + 5 Physical Copies
Clearly mark the outside of the sealed submittal Envelope as follows:
“Response to Owners Construction Representative RFQ”.

Late, faxed, or emailed copies will not be accepted for consideration. It shall be the responsibility of the firm submitting the proposal to ensure that it has been properly received by the deadline. If a proposal is not legible, the District has the discretion determine that the proposal is non-responsive.

Each proposing firm shall submit a proposal that is signed in ink by an authorized individual or officer of the firm submitting the response and no proposals shall be withdrawn for a period of 90 days after receipt. In order to control information disseminated regarding this RFQ, firms are not to make personal contact with the Board of Trustees and/or any District Employees with exception of the owner contact.

All submitted items will become property of the District and the District reserves the right to make use of any or all information it contains or reject any or all proposals, information in the proposal will become public property and subject to disclosure laws. All costs associated with the preparation or submission of the proposal for this RFQ are solely the responsibility of the candidates. The District may, for good cause, reject any or all proposals and to rescind the award of any contract at any time before the execution of said contract by all parties with no liability against the District.

Project Schedule:

RFQ Available: June 15, 2020 9:00 a.m. MST
RFQ Submittal Deadline: June 30, 2020, 4:00 p.m. MST
Interview Invitations: July 2, 2020 (if determined to be necessary)
Interviews: Tentatively scheduled for July 7, 8 or 9, 2020
Candidates Notified of Selection: July 10, 2020
Candidates Board Approval : July 14, 2020 at regularly scheduled Board of Trustees Meeting
Notice to Proceed Given to Successful Candidate: July 15, 2020. *(Pending Board of Trustee Approval)*

Project Background and Description:

Three Forks School District voters approved bond amounts totaling \$25 million for these projects. The Bond language identified 3 areas to be addressed: Safety, Space and Infrastructure. "Increase or reconfigure educational space to meet the requirements of OPI Standards for the growing student enrollment, as well as design to improve site safety, building safety, ADA accessibility, indoor air quality, electrical and mechanical systems."

The student enrollment has increased and the existing buildings on the campus are not meeting user's space needs. As a result, new construction for new student spaces are to be added to the campus as well as improvements to existing spaces to support the growing student population. Renovation scope is to include updating the MEP systems, adding fire protection systems, and abating hazardous materials where work will occur. Reorganization and reconfiguration of space is required to connect existing building space to the new building space and improve access to and within existing space.

Site improvements may include: a new bus & fire lane to the north side of the buildings, relocation of play areas, improved elementary age drop-off area, new parking at the northeast side of the site, improve perimeter sidewalks and curbs / gutters, adjust grading and landscape at new building additions, and provide adequate fire hydrants at north side of building.

The Project Team:

Owner: Three Forks Public Schools represented by the Board of Trustees and Administration and assisted by the selected Owner's Construction Representative.

Design Team: 45 Architecture, Associated Construction Engineers, TD&H Engineering, DCI Engineers and H-C Design.

Construction Team: Jackson Contracting Group as Construction Manager/General Contractor.

The District is looking for an experienced Owner's Construction Representative possessing the following:

- A minimum of 10 years of field experience in a construction-related field on projects with construction costs in excess of \$5,000,000 or a Bachelor's Degree in Engineering, Architecture, or Construction Technology.
- Demonstrated ability to professionally represent the District's interests in all phases of the project, management, construction, inspection, and acceptance.
- Strong verbal and written communication skills.
- An ability to promote an honest, effective working environment among all parties involved in the project.
- Experience with the design and construction process, construction practices, and materials, preferably with school projects.
- A working knowledge of building systems, codes, and regulatory requirements.
- A working knowledge of Montana laws on public contracts, bidding, and procurement methods.
- Experience with construction and architectural contracts, their modifications, and the working relationships between them.
- Experience managing a project budget and schedule.
- Ability to develop creative and cost-effective solutions to problems.
- Ability to work with a publicly funded board, including making public presentations to and for the Board.
- Working knowledge in some or all disciplines including architectural design, structural engineering, mechanical engineering, electrical engineering, civil engineering, construction cost estimating, facility management, and maintenance, information technology (word, excel, accounting).
- This project requires the Candidate to carry a minimum, general liability insurance (\$1,000,000), and

workers compensation according to Montana law.

The Owner's Construction Representative's duties shall include, but are not limited to:

- Review and provide a written assessment of the District's project information, including the preliminary conceptual plan options and cost projections.
- Review and provide a written assessment of the District's project budget.
- Design and monitor project delivery methodology.
- Develop, monitor, and update the overall project schedule.
- Provide agendas for, organize, coordinate, and provide minutes for regular facility committee meetings and all other related meetings.
- Coordinate the solicitation of proposals, make recommendations and assist in hiring the Owner required services related to the project, such as surveys, geotech, security, tele-data, furniture and equipment, environmental services, as well as construction testing and special inspections.
- Function as communication liaison between all parties. Provide written record of all substantive project communications and actions.
- Provide guidance to District on construction-related issues such as Change Orders, schedule adjustments, and other items that may develop during the course of the project.
- Coordinate, with the design team, the permitting process through local and state jurisdictions.
- Represent the District's interests in all matters pertaining to the design, permitting, bidding, inspection, and construction of the proposed facilities and enhancements.
- Provide and catalog a photo-documented digital record of key construction related activities.
- Produce, update, and provide to the District a complete project file.
- Provide regular updates to the School Board of Trustees including attending trustee meetings.
- Provide project closeout coordination, including one-year warranty inspection.
- Attend public meetings as needed and/or required by the District. Speak and make presentations on behalf of the project.
- Both parties may agree upon other duties.
- Generally protect the District's interests during the course of the project.

Further project information / Contact with Owner:

Owner Contact: Superintendent Jeff Elliott
(406) 285-6380
jelliott@threeforks.k12.mt.us

Candidates wishing to obtain further project information, tour the facilities, or otherwise enhance their understanding of the project may do so by appointment with Jeff Elliott, Superintendent at the contact information listed above.

Instructions to Interested Proposers:

Interested individuals or firms must submit a Response that conforms to the following:

1. Is signed by an officer or principal of your business organization.
2. Is contained in a document not to exceed a total of twenty-five (25) single side, standard size (8 1/2" x 11") pages in length, single sided, minimum 11-point font. This page limit is inclusive of all information, pictures, charts, graphs, tables, and text the proposer deems appropriate to be part of the review of the

firm's qualifications. A transmittal letter and front and back cover pages are exempted from the page limit.

3. Proposers shall provide one (1) original, clearly marked ORIGINAL on the cover, and five (5) bound copies of its response and one electronic copy. Divider sheets, void of specifics related to the proposal content and evaluation, are required for each of the required components. Divider sheets will not be included in the page count. Facsimile or e-mailed transmissions will not be accepted.

Content of Submissions:

1. General Information:

Provide a company or individual profile including principal areas of expertise and experience providing owner's representative services. Include an organizational chart depicting the management of the firm's organization and its relationship to any other business entity. Proposals should include the following information:

- Date, state and type of business organization (close, general, or S corporation; LLC or PLLC; sole proprietorship)
- Names of Owners, Principals, and/or Officers
- The name, title, e-mail address, mailing address, fax and telephone number of the officer authorized to represent the consultant in any correspondence, negotiations, and sign any contract that may result.
- Any civil or criminal claims, judgments, or suits within the last ten (10) years.
- Disclosure of any disciplinary actions on any previous projects, if any.

2. Project Approach:

Describe your recommended and/or alternative approaches to delivering owner's representation services, including the following:

- Describe those services that your firm may or proposes to provide as an owner representative for the project.
- Describe any resources that your firm would use or provide in serving as an owner representative.
- Describe how you will use information technology in the performance of project duties.
- Describe how you will manage the project budget, schedule, and scope.
- Describe how you will ensure quality control.

When appropriate include the number of meetings, site visits, etc., and any other pertinent descriptions that clearly identify services included in the proposal.

3. Staffing Proposal:

Provide a staffing proposal including a narrative description, organizational chart of the proposed team and resumes of key personnel. Proposals should include the following information:

- Identification of key personnel to be utilized for the project.
- Key personnel's resumes including name, title, education, experience, references, professional affiliations certifications, licenses, and registrations.
- Describe the roles and responsibilities of the key personnel in your staffing proposal.
- Number of hours of key personnel to be devoted to the project (in the aggregate, by week or by month).
- Key personnel's current assignments and the percentage of their time each will devote to each assignment if selected for this project.
- Key personnel's office location(s).
- Identify any external sub-consultants and describe their roles and responsibilities with the Project

Team.

4. Similar Project Experience & References:

Describe the firm's current and recent experience serving as an owner representative on similar projects.

Proposals should include the following information:

- Brief description of no less than three or more than six recent similar projects where the firm provided owner representative or similar services, including the owner, project delivery methods, architect owner reference including name, title, phone number, contractor reference including name, title, phone number, and email address.
- Provide a list of all school projects completed or begun within the last 10 years with contact information and a brief project description.

5. References/Letters of Recommendations from previous relevant experience with similar projects.

6. Disclosure of any disciplinary actions on any previous projects, if any.

7. Permission for Owner to conduct a Criminal Background Check, if requested.

Owners Construction Representative Compensation:

Compensation for the successful candidate(s) will be negotiated on a fair basis in conformance with industry standards. The candidate's proposed method of compensation will also be factored into the final fee negotiations.

Public Nature of Submittals:

Because they are submitted to a public entity, all RFQ submittals are public documents and may be viewed at the District Offices by anyone with an interest.

Acceptance or Rejection of Submittals:

The Owner reserves the right to accept or reject any or all responses to the Request for Qualifications. Proffering this solicitation does not obligate the Owner to retain or contract with an Owner's Construction Representative.

Selection Process:

Depending on the number and quality of submittals received, the District may conduct interviews of selected candidates or may choose to make the selection of the preferred Owner's Representative candidate based on the submittal information alone. In this case the selection scoring will be made public as soon as the successful OCR is selected.

After interviews numeric scores will rank the candidates, and the District will begin contract negotiations with the preferred candidate. If negotiations are successful the other candidates will be informed immediately. If the negotiations with the preferred candidate are unsuccessful negotiations will be formally terminated by the District and started anew with the second ranked finalist, and thus until a suitable agreement can be reached.

Candidate Assessment Scoring:

Selection Criteria	Max Points Possible
1. RFQ: How complete were the RFQ response? Was the RFQ well, organized, with complete information responding to all submittal criteria?	20 points
2. Experience and Qualifications: Provided a comprehensive package which	25 points

highlights the experience of key personnel who will staff the project. Previous experience as Owners Construction Representative with similar projects. Experience with governmental agencies having jurisdiction.	
3. Scope of Services: Candidate has affirmed each of the District's requirements and expectations for the project, and demonstrates a clear understanding of the District's project and a clear direction towards completing the scope of work.	25 points
4. Subjective Fit: How well does the candidate understand the District's goals and mission	25 points
5. References: Candidate has provided a project list with contact information for similar projects completed over the last ten years.	5 points
Total Points:	100 points

Interviews:

If deemed necessary, an interview invitation will be sent out to the three Candidates with the highest RFQ submittal scores on the date noted in the project schedule. The invitation will explain the interview requirements and provide the time and location. The purpose of the interview is to ensure a full understanding of the RFQ responses and to introduce key members of the team.

The interviews will consist of a 20 minute presentation followed by a 35 minute period for questions and answers. During the presentation, the lead consultant for the project should be identified along with members of their team. Please note team members that will not be directly working on the project day to day are not invited to the oral interviews.

The apparent winner will be determined based on their interview score along with an evaluation of materials submitted as requested, which is separate from their RFQ submittal score.

Acceptance and Rejections:

The Owner reserves the right to select any or reject any and all proposals in their best interest. The Owner also reserves the right to pre-qualify any or all Candidates or reject any or all Candidates as unqualified, including without limitation the right to reject any or all nonconforming, nonresponsive, unbalanced, or conditional, qualifications. The Owner also reserves the right to re-solicit, waive all informalities not involving price, time, or changes in the work, and to negotiate contract terms with the apparent successful proposer.

The Owner is not responsible for cost incurred in preparation of this proposal. Proposals will not be returned and become the property of the Owner once submitted, which could be publically shared. By submitting a proposal all Candidates agree to the terms and conditions of this RFQ and the RFQ will become part of the awarded Candidates contract. The Owner and Owner's legal council will submit a draft agreement to the apparent winner to be used on this project. The Owner and Owner's legal council will negotiate terms with the apparent winner prior to commencement of work.