

REQUEST FOR QUALIFICATIONS AND PROPOSAL (RFQ/P)
FOR GENERAL CONTRACTOR/CONSTRUCTION MANGER SERVICES
for the
Bridger View Redevelopment

I. Introduction

To all interested contractors: The Human Resources Development Council (HRDC) is seeking a Statement of Qualifications (“SOQ”) and specific proposals (Proposal or RFP) from General Contractor/Construction Manager (“GC/CM”) firms to provide GC/CM services for the pre-construction and construction phases for the Bridger View Redevelopment Project (the “Project”), a proposed 63-unit mixed-income neighborhood on an 8-acre parcel next to the new Story Mill Community Park in Bozeman, MT. The project will be managed out of HRDC’s office in Bozeman.

After identification of a preconstruction fee, a GC/CM fee, and fixed costs for general conditions, HRDC may contract with the selected GC/CM firm to undertake preconstruction services, and upon successful completion of bidding and after acceptance of a Guaranteed Maximum Price (GMP) construction services through completion of the Project. Alternatively, HRDC may, at its sole discretion, choose not to continue with the GC/CM contract beyond completion of preconstruction activities and solicit competitive bids from qualified contractors for the construction of the Project.

GC/CM selection information will be obtained from the Proposals submitted in response to this solicitation, interviews, and discussions with former and present clients of Respondents. When selected, the GC/CM will function as part of a team composed of HRDC, the previously selected Design Team, and others as determined by HRDC.

This solicitation shall not commit HRDC to enter into any agreement, to pay any expenses incurred in preparation of any responses to this request, or to procure or contract for any supplies, goods, or services. The project scope, specifications and requirements that are outlined in this solicitation are subject to modification and final contract negotiations.

II. Scope of Project – Project Background and Description

A. Background Information

HRDC is a private, non-profit Community Action Agency dedicated to building a better community through innovation and leadership in seven strategic areas: Housing, Food & Nutrition, Child & Youth Development, Senior Empowerment, Community Transportation, Home Heater-Energy-Safety, and Community & Economic Development. HRDC guides individuals from every walk of life on the path to self-

sufficiency, identifies and addresses diverse community needs, and inspires others to make a difference in their communities.

The Bridger View Redevelopment project is located on an 8.03-acre property in northeast Bozeman at the junction of Bridger Drive and Story Mill Road and adjacent to the new Story Mill Community Park. HRDC is working in partnership with The Trust for Public Land, a non-profit organization that creates parks and protects land for people, ensuring healthy, livable communities for generations to come. From its Bozeman office, TPL has led the development of the adjoining Story Mill Community Park.

The Bridger View Redevelopment is envisioned as a diverse neighborhood where families at various income levels, stages of life, sizes, and backgrounds can afford to purchase a home in Bozeman. This mix cultivates a healthy, vibrant and safe living environment that sustains the rich fabric of the Bozeman community and fosters pride of place resulting in good stewards of homes, neighborhood, and community.

Small, well-designed homes ranging from multi-unit to clustered single-family housing types are included in the conceptual plan. The varied housing types are compatible in scale with single-family homes but offer moderate densities appropriate in this transition zone between downtown Bozeman and nearby larger lot single-family neighborhoods.

This new housing choice offers locals the ability to trade size for location and an affordable option for working families that find it increasingly difficult if not impossible to purchase a home in this area of town. These smaller homes minimize the environmental footprint, reduce construction costs, and fill a niche in the Bozeman housing market that is missing.

The site design is intended to capture the essence of pre-1940's traditional neighborhoods, such as the northeast neighborhood in Bozeman. Characteristics include an approachable scale, walkable streetscape, modest size, simple construction, shared community spaces, eclectic designs, moderate density and features that encourage neighbor interactions.

B. Project Description

The neighborhood is intended as a 100% residential ownership product with moderate density of approximately 8 units/acre totaling 63 units and a common house on the 8-acre parcel. The product type of modest, high performing homes range in size from 800 to 1500 square feet, contain one to three bedrooms and are a mix of clustered single-family and multi-unit housing types compatible in scale to single-family homes.

A core goal of the project is to incorporate sustainable design and construction practices that are intended to increase energy efficiency, enhance the health and wellbeing of building occupants and offer benefits to the environment. The project may seek sustainability certification, or third-party certification of sustainable design, construction, or energy performance, such as Enterprise Green Communities, LEED, Energy Star, or another rating or certification system.

Site plan characteristics include shared common spaces, clustered parking, a shared community building, clustered parking and smaller streets that promote neighborhood interaction, and provide equal emphasis for all modes of travel: pedestrian, bike, car, and public transit.

C. Project Team

HRDC will act as the owner leading the project through design development, entitlement, construction and sales. The Trust for Public Land (TPL), the current property owner, will transfer ownership to HRDC in June 2019. Design development will be based upon a PUD Concept Plan that was developed in 2017 and received informal review by the City of Bozeman http://bit.ly/Bridger_View Minor modifications may be made to the PUD Concept Plan for Preliminary PUD submission in response to comments received.

It is anticipated that the GC/CM will start its involvement with the Project providing preconstruction services during design development in cost estimating, value engineering, schedule and phase development. The selected GC/CM will work collaboratively with the Design Team, led by HRDC and including: evolve environment::architecture, Comma Q Architecture, GroundPrint Consulting, Stahly Engineering, a sustainability consultant (to be determined) and realtor (to be determined), the team will advance design development and secure City of Bozeman entitlements and other necessary permitting.

D. Project Budget

Total funding available for infrastructure and construction of dwelling and common elements is anticipated to be approximately \$20M. The Construction Phase contract is contingent on an agreed upon Guaranteed Maximum Price.

III. Timelines, Delivery Deadline and Instructions

As the initial submittal to the Owners, one original and four copies of SOQs and Proposal, and an electronic copy on a flash drive as a single PDF document must be delivered no later than **3:00 PM Mountain Time, Thursday, May 18, 2019** in an envelope clearly labeled with the company name addressed to:

HRDC
Bridger View Redevelopment Project RFQ/RFP for GC/CM Services
Attn: Martin Johnson
32 S Tracy Ave.
Bozeman, MT 59715

Incomplete, unsigned, or responses submitted after the deadline shall not be considered.

A. Contact Information

Requests for additional information or clarification should be directed to: Martin Johnson, HRDC Project Manager; phone: 406.451.0006; email: mjohnson@thehrdc.org.

B. Amendments to Solicitation

Any interpretations or correction to this request will be made by written addendum. The deadline for questions related to this document is Monday, May 13th at 3:00 PM.

C. Selection Timeline

RFQ/P Release	Sunday, April 21, 2019
RFQ/P and Site Information Meeting	Monday, May 6, 2019 4:00 – 5:00 PM 32 S. Tracy Avenue, Bozeman, MT
Submission Deadline due	Thursday, May 16, 2019 4:00 PM
Interviews of select Respondents	Wed/Thurs, May 29/30, 2019
Review and Selection complete by	Friday, May 31, 2019

D. Anticipated Timeline for Preconstruction Phase

Design Development	July, 2019
Design Development 50% complete	December 10, 2019
50% DD Cost Estimating Complete	December 31, 2019
Design Development 100% complete	April 30, 2020
100% DD estimate complete	May 14, 2020
Construction Documents Complete	June 30, 2020
Guaranteed Maximum Price established	July 19, 2020

IV. Selection Process

A. Request for Qualifications and Proposal

This submittal is a combination Statement of Qualifications and Proposal. To qualify for consideration, Respondents must comply with the mandatory requirements provided in this solicitation. The selection process is intended to evaluate the qualifications and capabilities of interested GC/CM firms to provide services to the Project and the prices which they intend to charge. The GC/CM will be selected based on the overall merit of its Proposal, including relevant fees and prices, information contained in the Proposal, references, interviews and information obtained from other reliable sources.

1. Evaluation of SOQ. The selection committee will review conforming SOQs using the selection criteria listed below. SOQs that do not contain the required documentation will not be considered.
2. Evaluation of Proposals. The selection committee will review conforming Proposals using the selection criteria listed below. Proposals that do not contain the required documentation will not be considered.
3. Revisions. Responses will be accorded fair and equal treatment with respect to opportunity for discussion and revision of responses, and such revisions may be permitted, after submissions and prior to award for the purpose of obtaining best and final responses.
4. Interviews. Interviews will be conducted at the discretion of the selection committee. Each firm selected for an interview will be notified of the specific time and format for the interview. The GC/CM's proposed project manager, estimator, and construction superintendent must be present for the interview.
5. Selection and Final recommendations. The selection committee will review scores for qualifications and proposals along with interview scores. Upon selection, contract negotiations will take place between HRDC and the successful respondent. HRDC may negotiate a contract with the next highest ranked respondent if a contract cannot be made.

V. Request for Qualifications/Proposals – Form and Content

Deliver one original and four copies and an electronic copy on a flash drive as a single PDF document prepared as follows:

A. General Instructions

1. RFP/Q must be signed by an officer or principal of your firm.
2. RFP/Q must be contained in a document not to exceed 30 pages total, including whatever pictures, charts, graphs, tables and text the firm deems appropriate to be

part of the review of the firm’s qualifications. The transmittal letter, cover page, cover sheets and dividers are exempted from the page limit.

3. Schedules may be submitted in addition to the page limit.
4. Preconstruction Fixed fee – Form PF completed.
5. General Conditions schedule – Form GC completed.
6. Proposed general contractors fee percentage form – Form CF completed.

B. General Contractor/Construction Manager Firm Information

1. Firm Experience. Respondent must demonstrate successful experience and capacity to act as a general contractor on projects of similar size, type, and complexity. Describe at least three completed projects in the last five years with a contract value exceeding \$10 million. Provide the name and location of each project, the client, and the contact person and contact information (email and phone number). Specifically note the delivery method for each project, total construction cost, gross area, date of bid and date of completion.
2. Sustainability Experience. Provide information regarding experience with sustainable construction methods and materials, and innovative techniques used by the contractor to deliver sustainable, cost effective product that increases energy efficiency, enhances the health and wellbeing of building occupants and offers benefits to the environment. Provide any examples of experience obtaining sustainability certification, or third-party certification of sustainable design, construction, or energy performance, such as Enterprise Green Communities, LEED, Energy Star, or another rating or certification system.
3. Contractor Registration. Evidence of current Montana Contractor Registration must be included with response.
4. Firm Workload. Provide the status of current and anticipated work within the firm in terms of time and magnitude for the anticipated Project schedule as it relates to availability of key personnel and your firm.

C. Bonding

The GC/CM must be able to provide a Performance and Payment bond in the amount of \$20M including GC/CM fees and Guaranteed Maximum Price. Include an original letter from a bonding company certifying the bonding capacity of the Respondent.

D. Project Specific Information

1. Financial Health and Pricing
 - a. Financial Health. Provide a completed and properly executed “Contractors Qualification Statement” (AIA A305-1986).
 - b. General Conditions. Pricing per month as set forth on the attached Form GC and included in the Proposal.

- c. General Contractor's Fee. Percentage basis as set forth on the attached Form CF and included in the Proposal.
- d. Preconstruction Fixed Fee. Fixed fee basis from commencement of contract to GMP agreement as set forth on the attached Form PF and included in the Proposal.

2. Project Team for the Bridger View Redevelopment

- a. Provide a list of names and define the relationship of management individuals that you will commit to this Project. Include project management, field management, construction superintendent, estimator, schedulers, etc., and describe how you will organize your effort for this project. Please indicate who will be assigned for the preconstruction and construction phases.
- b. For each team member, describe:
 - i. Role on the project
 - ii. Experience and relevance to project
 - iii. Specific experience with projects of similar scope, size and type
 - iv. Time commitment during each phase of Project
 - v. Other projects and assignments: duration, scope and anticipated time commitment
 - vi. Length of employment with your firm; if less than three years, prior firm(s)
 - vii. References with contact information for previous two projects in a similar role
- c. A key personnel clause will be included in the GC/CM contract.

3. Project Management and approach

Identify the specific methodology your firm will use in the administration of this Project, in both the preconstruction and construction phases.

- a. Describe your firm's ability and approach to:
 - i. Managing costs during design and construction. Describe your cost management philosophies and techniques. For at least the last three completed GC/CM projects, provide history of estimates at the programming stage, each design stage, final GMP, and final contract amount. Explain any extenuating circumstances, if necessary.
 - ii. Integration with the design team.
 - iii. Assisting the designers with:
 - 1. Quality of the project documents
 - 2. Constructability
 - 3. Alternative methods and products
 - 4. Budgets and estimating
 - 5. Timing and sequencing for concurrent construction

- iv. Maintaining good relations with the community and adjacent property owners.
- b. Describe your firm's approach to:
 - i. Cost estimating
 - 1. What methodology do you use?
 - 2. How do you organize your estimate?
 - 3. During design, how do you determine the final cost when not all work is shown?
 - 4. Do you have in-house estimating staff? If so, what are their other responsibilities? How much of their time is spent in cost estimating?
 - ii. Subcontractors
 - 1. How do you ensure that this Project will get appropriate response from the subcontracting community?
 - 2. How much do you use subcontractors for cost information during the preconstruction phase?
 - 3. When would you involve subcontractors in this Project?
 - 4. How do you address subcontract bids that are different than the cost estimate?
 - iii. Value engineering
 - iv. Budget revisions
 - v. Planning and scheduling the construction work
 - 1. Do you use critical path scheduling methods?
 - 2. How do you manage and schedule the procurement and the submittals process and its impact on field activities?
 - 3. How do you track progress against the schedule during construction?
 - 4. Do you use computer software to develop the schedule? If so, what kind?
 - 5. Do you have experience with concurrent construction?
 - 6. Provide examples of the last schedule from two recently completed projects.
 - vi. Project communication

VI. Evaluation Criteria

A selection committee shall review the respondents' SOQ and Proposal. Interviews are discretionary, and a selection may be made from the SOQ and Proposal.

Selection of the winning Respondent will be based and scored on:

Firm Experience and Capability

20 points

Proposed GC/CM Project team	20 points
Experience with sustainable design and construction practices	20 points
Experience with neighborhood layout and design that promotes livability (walkable, moderate density, etc.)	20 points
Proposed Fees and Costs	20 points

VII. Form of agreement

Respondents will agree to utilize AIA Standard Agreement A133 (Standard Form of Agreement Between Owner and Construction Manager as Constructor) and A201 (General Conditions of the Contract for Construction). The final form of the documents will be disclosed to Respondents during the selection process.

The Project scope is to provide pre-construction and construction services for the Bridger View Redevelopment Project. The GC/CM must competitively bid all construction subcontracts and other work appropriate for competitive bidding. Selection of subcontractors and suppliers shall be performed in a manner to be negotiated in the Pre-Construction Services Conditions after selection of the GC/CM and at the appropriate stage/phase of the design and construction process. It should be noted that major subcontractor input may be desired during the design phase of the project in order to achieve the best value for HRDC.

VIII. Reservation of Rights

The HRDC reserves the right to reject any or all proposals. All costs incurred by a Respondent in connection with the preparation and submission of a SOQ, Proposal and any subsequent interviews and/or negotiations, which may or may not lead to execution of a contract, shall be the responsibility entirely and exclusively of the Respondent. All phases of this Project are subject to availability of funds.

IX. Nondiscrimination Policy

The selection of GC/CM shall be made without regard to race, color, sex, age, religion, national origin, or political affiliation. The HRDC is an Equal Opportunity Employer and encourages proposals from qualified minority and woman-owned businesses.

Exhibit A Project Details

I. SCOPE OF SERVICES

The Project scope is to provide preconstruction and construction services for the Bridger View Redevelopment project. For the purposes of the Scope of Services, the Project Team is comprised of HRDC and the design team noted in the RFQ/P.

A. SCOPE OF PRECONSTRUCTION SERVICES

Preconstruction services will be provided on a fixed fee basis. The specific scope of preconstruction services will be negotiated prior to signing the GC/CM contract. In general, preconstruction services are anticipated to include the following:

1. Assistance with Design and Engineering
 - a. The GC/CM shall review the current design and make recommendations to the Design Team in order to produce:
 - i. Cost-effective and durable specifications for materials and methods of construction
 - ii. Sustainable design and construction practices, including 3rd party certification
 - iii. Appropriate phasing of construction activities
 - b. Assistance with Construction Documents (“CDs”). The Design Team will provide plans, details, and specifications for HRDC and GC/CM review, with revisions as necessary. The GC/CM shall provide input during the preparation of the CDs with the goal as stated in (a) above.
2. Cost Estimates. The GC/CM shall coordinate with the Design Team and provide cost estimates for specific items during Design Development with itemized cost estimates for each portion of the Project to be constructed, including any alternative bid items, at the following stages:
 - a. 50% Design Development
 - b. 100% Design Development
3. Additional Pre-construction Services.
 - a. Prepare pre-qualification criteria for material suppliers and contractors and develop vendor and contractor interest in the project.
 - b. Schedule all project construction related activities.
4. Generally, GC/CM shall:
 - a. Participate in all design, coordination, and Design Team meetings;

- b. Review all design features for efficiency, sustainability and constructability;
- c. Work with the Design Team on phasing, scheduling, and other strategies to complete construction on or before the stated date;
- d. Coordinate and gather input from subcontractors regarding constructability;
- e. Review and evaluate costs of design taking into consideration schedule, phasing and market conditions;
- f. Consult with, advise, assist, and provide recommendations to the Design Team on all aspects of the planning and design of the work;
- g. Provide information, estimates, schemes, and participate in decisions regarding construction materials, methods, systems, phasing, sustainability and costs to assist in determinations which are aimed at providing the highest quality project, constructed using the most sustainable construction materials and practices, within the budget and schedule;
- h. Actively participate in a value engineering process;
- i. Review the programming/planning documents and provide input and advice regarding scope and cost of the Project;
- j. Review in-progress design and construction documents and provide input and advice on construction feasibility, alternative materials, costs, and availability;
- k. Review completed design and construction documents prior to subcontractor/supplier selection and suggest modifications to improve completeness and clarity and to eliminate construction change requests due to inconsistencies or omissions in the construction documents;
- l. Provide input to the Design Team regarding construction market bidding climate, status of key subcontract markets, and other relevant economic conditions;
- m. Recommend and actively source labor and material resources necessary to complete the project construction;
- n. Provide input to the Design Team regarding long lead time materials and equipment, impact on the construction schedule and strategies for mitigating the impact;
- o. Prepare construction cost estimates for the Project for design development and construction document design phases and, if appropriate, at other times throughout of the work;
- p. Notify HRDC immediately if construction cost estimates appear to be exceeding the construction budget, and reconcile each cost estimate with the design team cost estimate, if required;
- q. Furnish Guaranteed Maximum Price for the HRDC review and approval;
- r. Develop a preliminary construction schedule.

B. SCOPE OF CONSTRUCTION SERVICES

Upon the commencement of the construction phase, the successful Respondent will be obligated to perform all construction services to complete the Project. Those construction services are set forth in AIA contract form A133 and A201.

A Guaranteed Maximum Price (GMP) will be requested at the conclusion of the preconstruction phase. The established GMP will be the maximum amount paid for the construction of the Project, unless scope changes are requested and approved by HRDC. Acceptance of the GMP will constitute completion of preconstruction services and an agreement to enter into the construction phase for the Project. At the time of execution of the GMP Agreement, the GC/CM will be required to submit a 100% performance and a 100% payment bond for the amount of the GMP.

HRDC retains the option to not commence or cancel the construction phase services, or to start a new process for the construction of the Project or terminate the contract and negotiate a replacement contract with the next highest rated Respondent from this solicitation, or to conclude the GC/CM's services at pre-construction and issue the Project on a lowest, responsible bidder method.

1. Construction Services.
 - a. Prepare, execute and manage contracts with all contractors and sub-contractors.
 - b. Coordinate and direct the work of the sub-contractors.
 - c. Coordinate ordering, delivery, utilization, and inspections to ensure compliance with Project design and specifications of Owner-approved materials into the project.
 - d. Conduct a general pre-construction and in-depth pre-construction meeting with all major sub-contractors prior to the start of their work activities.
 - e. Provide temporary job site facilities and services.
 - f. Provide site security and control site access.
 - g. Track construction costs and maintain detailed construction cost records.
 - h. Review and process shop drawings and other submittals.
 - i. Establish, monitor, and update a construction scheduling system.
 - j. Maintain and provide as-built information for preparation of record drawings.
 - k. Review requests for changes, challenge the cost of the contractors as necessary, and make recommendations to HRDC and Project Team.
 - l. Review and process all pay request applications by the sub-contractors.
 - m. Develop and monitor a comprehensive safety program for the Project.
 - n. Conduct weekly progress and coordination meetings with on-site trade foremen or superintendents.
 - o. Conduct weekly meetings with the Project Team to review construction progress, scheduling, conflict resolution, etc.

- p. Supervise, direct and manage all construction activities included in the site plan for the Project.
- q. Obtain all required permits and approvals of public agencies and other authorities (appropriate permits may be delegated to sub-contractors), unless otherwise determined by Project Manager.
- r. Establish and maintain quality control and quality assurance standards.
- s. Negotiate project agreement, which will mitigate disputes, work stoppages, or jurisdictional disputes.
- t. Provide record keeping and insure proper reporting required by the Project Team.
- u. Other services as deemed appropriate by the Project Team.

EXHIBIT B Proposal Forms

The following will be attached to the notices which invite Proposals to each qualified Respondent in a form substantially similar to:

Form PF – Preconstruction Fee

The Respondent agrees to furnish Preconstruction Services as set forth in this Solicitation for Proposals in the amount of (written and numerical) _____ (\$_____) for the period of time from the time the General Contractor – Construction Manager contract commences until HRDC agrees to a Guaranteed Maximum Price as set forth herein.

Form CF – Construction Fee

The Respondent agrees to charge the following percentage of the Cost of the Work as set forth in this Solicitation for Proposals in the amount of: (written and numerical) _____ (___%) for the construction phase of the contract with HRDC.

Form GC – General Conditions

CONSTRUCTION PHASE GENERAL CONDITIONS COSTS

PLEASE SPECIFY HOW EACH CATERGORY IS TO BE CHARGED	MONTHLY	LUMP SUM
Office Expenses, including:	\$ _____ / month	\$ _____ lump sum
GC/CM field office equipment and supplies; records and records management; meeting expenses; site signage; quality control; all printing and mailing expenses; and all other administrative expenses		
Construction Management Labor including:	\$ _____ / month	\$ _____ lump sum
GC/CM cost management, safety, and general conditions labor (including all fringe and insurance)		
Monthly Total:		
Lump Sum Total:		
Other expenses not listed above (add to list as necessary):		
\$ _____ / month	\$ _____	lump sum
\$ _____ / month	\$ _____	lump sum
\$ _____ / month	\$ _____	lump sum
TOTAL:	\$ _____ / month	\$ _____ lump sum