

**REQUEST FOR QUALIFICATIONS**  
**GENERAL CONTRACTOR /**  
**CONSTRUCTION MANAGER SERVICES**

**ROMNEY HALL RENOVATION**  
**MONTANA STATE UNIVERSITY**  
Bozeman, MT

**A/E #2012-02-14; MSU PPA #16-0164**



Architecture & Engineering Division  
Department of Administration  
PO Box 200103  
Helena, MT 59620-0103  
&  
Planning, Design & Construction  
Montana State University  
Physical Plant – 6<sup>th</sup> Avenue & Grant Street  
PO Box 172760  
Bozeman, MT 59717-2760

**SEPTEMBER 2018**

## I. INTRODUCTION

The State of Montana (Owner), is seeking qualified General Contractor /Construction Manager (GC/CM) firms to undertake preconstruction and potentially construction services for the renovation of Romney Hall on Montana State University campus.

Owner intends to enter into a GC/CM Contract with the selected GC/CM firm that will include Preconstruction Services and identification of a GC/CM Fee and Fixed Costs for General Conditions Work, with provisions for adding Construction Services through acceptance of a Guaranteed Maximum Price (GMP) by Contract amendment. The GMP would include construction services through completion of the Project. Alternatively, Owner may, at its sole discretion, choose not to continue the GC/CM Contract beyond the completion of preconstruction activities and solicit bids from qualified contractors for the construction of the Project.

Owner will use the RFQ process to evaluate each of the Proposers' qualifications. A subsequent Request for Proposals (RFP) will be issued to all qualified Contractors who will then be required to submit detailed information regarding project-specific capabilities, experience, and costs. GC/CM selection will be determined from the Proposals submitted in response to RFP document, interviews, and discussions with former and present clients of Proposers.

When selected, the GC/CM will function as part of a team composed of the Owner, Architect, and others as determined by the Owner.

This Request for Qualifications shall not commit the Owner 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 Owner 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 First Judicial District, City of Helena, Lewis & Clark County.

By offering to perform services under this Procurement, all Proposers agree to be bound by the laws of the State of Montana, including but not limited to applicable wage rates, payments, gross receipts taxes, building codes, equal opportunity employment practices, safety, etc.

*The State of Montana 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 state 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.*

## II. PROJECT BACKGROUND AND DESCRIPTION

### Introduction

Romney Hall is a 53,074 GSF, well-constructed but grossly under-utilized, historic masonry building at the heart of the original campus core. In general, the building envelope is in good, serviceable condition but the interior is a prime candidate for repurposing.

- Level 1 is approximately six feet below grade/entry level;
- Level 2 is approximately ten feet above grade. In order to pass from the north entry through the building to the south entry one must navigate at least two sets of stairs;
- The building currently houses the Education Health and Human Development (EHHD), Army Reserve Officers' Training Corps (ROTC), Gallatin College programs (Levels 1 & 2) and intermural programs (held in the main gymnasium and auxiliary gymnasium on Level 3).
- The former balcony of Level 4 is not used.
- Several spaces within the building remain as originally designed for the initial uses, such as the swimming pool and locker rooms, which are not in usable condition.
- The existing heating and electrical systems are beyond their useful lives and do not meet present standards.

Montana State University (MSU) has experienced dramatically increased student enrollment in the past decade, intensifying the need for optimizing the use of its existing facilities. Romney Hall is potentially a premier building on Campus that, upon renovation, will enable MSU to satisfy the classroom, veterans, disability and tutoring services required for MSU students' success.

Part of the overall phasing to accomplish the renovation is the relocation of the EHHD and ROTC programs into other, more suitable facilities. The Owner has contracted with CTA to produce construction documents for both: the EHHD program is move into a 15,538 square foot addition to be constructed on the east side of the Margas Haesas H&PE building (i.e. between the current H&PE and the presently-under-construction Norm Asbjornson Hall); and, the ROTC is to move into newly constructed 5,520 square feet in the "faculty court" area just southeast of Facilities Services.

The Owner intends to bid both projects and award contracts on a lowest-responsible bidder basis, contingent upon receipt of funding and authorization in the 66<sup>th</sup> Legislative session. The selected GC/CM will be requested to provide pre-construction services consisting of cost review, value-engineering and constructability. The Owner reserves the opportunity to negotiate construction services and a GMP for the EHHD and/or the ROTC with the selected GC/CM Contractor if it determines it is in its best interest to do so.

MSU intends to pursue construction funding and authority up to the amount of \$32,000,000 in the 2019 legislative session (i.e. 66<sup>th</sup>). Construction services may be added to the GC/CM's services upon project approval by the Legislature. The total project budget (i.e. all project-related costs) at this time is anticipated to be \$32,000,000 which includes the Romney Hall Renovation, EHHD Addition and ROTC Facility.

## **Project Location and Site**

Romney Hall is located near the heart of the MSU campus and is bounded on the north by a quad, on the west by Gaines Hall, on the south by Grant Street; and on the east by AJM Johnson Hall and a veterans' memorial plaza.

## **Design Considerations**

Romney Hall offers great opportunities to provide classrooms and collaborative learning environments in the highest demand and specific services directly related to the programs served by these classrooms. The proposed renovations would include the following learning spaces:

- 4 – 48 seat – preferred capacity for math classes;
- 4 – 28 seat – preferred capacity for writing classes;
- 2 – 100+ seat classroom;
- 2 – 28 seat Collaboration Labs;
- 1 – 300+ seat classroom in the round;
- 1 – 90 seat TEAL Classroom; and,
- 3 – 20 seat Collaboration Classrooms

New accessible restrooms, family care facilities, and single-use toilet rooms are to be provided on each level. Mechanical and electrical systems will be replaced, and a fire suppression system will be added to the building.

While repurposing of the facility is the main goal, Romney is significant for its architectural design excellence as well as its place within the history of Montana State University. It is one of seven Italian Renaissance Revival buildings constructed on the campus in the 1920's. Constructed in 1922 as MSU's original state-funded health and physical education building, it resides at the apex of the Romney Oval on axis with Montana Hall. Beautifully detailed with tapestry brick and terra cotta façade, large windows, copper detailing, and barrel-vaulted roof, it is an iconic building of significant historic value to the state's and campus' heritage. There are many significant components and character-defining features that are intended for preservation and protection during the renovation effort. Refer to Attachment C for additional information.

The design must adhere to the MSU campus long-range master plan, landscaping master plan, utility maps, campus design standards, State High Performance Building Standards, State Antiquities Act (MSU/SHPO consultation), and all applicable codes. Sustainability, life-cycle costs, maintainability, quality, and energy efficiency will be high priorities in the decision-making process for how this building will be designed and renovated. The building is expected to be submitted for a minimum of USGBC LEED Silver certification.

For the design, the Owner has selected:

CTA Architects Engineers  
411 East Main Street; Suite 101  
Bozeman, MT 59715  
(406) 556-7100  
Bob Franzen, [bobf@ctagroup.com](mailto:bobf@ctagroup.com)

The Owner is ready to hire a General Contractor / Construction Manager as the next step to informing and collaborating in the design process. The Design Development phase has been completed. The Design Development documents are Attachment D to this RFQ.

The following is the intended timeline for the project:

GC/CM Selection:

Advertising dates:	September 16, 23, 30, 2018
Last Date for Questions:	September 27, 2018
Receipt of Qualifications:	2:00 p.m. on October 4, 2018
Review & Short-List by Committee:	October 18, 2018
Issue RFP:	October 25, 2018
Potential Site Walk-Through	November 7, 2018
Receive Proposals:	5:00 p.m. on November 15, 2018
Interviews:	Week of December 3, 2018
Selection:	Week of December 17, 2018

Design/Construction of Romney Hall Renovation:

Review of DD set:	January 2019
Completion of CD documents:	December 2019
Early Work Package:	January 2020
GMP Established:	March 2020
Commence Construction:	April 2020
Construction Complete:	September 2021
Commissioning & Move-In:	January 2022

Design/Construction of the ROTC (construction services not presently part of the RFQ):

Bidding Documents complete: May 2109      Project Completion: January 2020

Design/Construction of the EHHD (construction services not presently part of the RFQ):

Bidding Documents complete: May 2019      Project Completion: June 2020

### III. SCOPE OF PRECONSTRUCTION SERVICES

Subsequent to the RFQ selection and short-listing, each potential firm invited to respond to the RFP shall propose a **maximum** Pre-Construction services fee. Pre-construction services will be provided on a cost reimbursement basis up to a stated maximum. The specific scope of pre-construction services will be negotiated prior to signing the final GC/CM contract, based on the proposer's input as well as the owner's requirements. Full preconstruction services will be

required for the Romney Hall Renovation. Limited preconstruction services consisting of cost review, value engineering and constructability review will be required for ROTC and EHHD. In general, services are anticipated to include the following:

1. General goals of pre-construction services
  - Serve as a partner to the design team and provide preconstruction guidance
  - Develop and update schedules, estimates, and action-plans at scheduled milestones
  - Guide decisions regarding phasing of the project to optimize quality, schedule, and budget
  - Strategically approach the sub-contractor market with a focus on providing quality, schedule, and budget value to the owner
  - 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 building, constructed using the most sustainable construction materials and practices, within the budget and schedule
  
2. Pre-construction services for quality assurance
  - Partner with design team to improve design through constructability reviews
  - Provide design team with collaborative input on design decisions that impact construction quality
  - Complete thorough visual and invasive investigations of existing conditions and strategically plan for challenges
  - Complete reviews of adjacent occupied spaces and strategically plan for impacts
  - Actively participate in a value engineering throughout the design process
  
3. Pre-construction services for scheduling and coordination
  - Provide design team with collaborative input on design decisions that impact construction schedule
  - Develop clear construction staging and impact maps, diagrams, schedules and plans accounting for the challenges of working in a building in the campus core. It's unknown at this time if the building will be vacant or occupied.
  - Anticipate, investigate, and plan for challenges of working within an existing building
  - Anticipate, investigate, and plan for challenges of working within an existing building
  - Provide guidance and strategy for developing Early Work Amendments (EWA)
  - Develop clear communication of impacts and schedules to stake holders and building occupants.
  
  - Guide design team to make changes beneficial to smooth on-boarding of sub-contractors
  - Work with the Owner and design team on phasing, scheduling, and other strategies to complete construction of this scale of project on or before the agreed upon date
  - Provide input to the Owner and the design team regarding long lead time materials and equipment, impact on the construction schedule and strategies for mitigating the impact
  - Develop a preliminary construction schedule

4. Pre-construction services for budgeting and estimating
  - Provide design team with collaborative input on design decisions that impact construction budget
  - Complete thorough and accurate line item cost estimating throughout pre-construction
  - Provide input on current market climate and economic conditions
  - Balance budget and schedule with needs of users.
  - Evaluate budget and makes suggestions for cost-saving changes or value enhancements.
  
5. Pre-construction services for the bidding process
  - Develop detailed and well-organized bid packages in coordination with design team
  - Advertise, manage, and obtain bids per trade for Owner review
    - o Self-performed work must be bid to other sub-contractors unless otherwise approved
  - Lead and manage bid package opening and tally results for review
  - Manage any bid-package amendments and communicate revisions to bidders
  - If necessary and upon execution of any Early Work Amendment prior to a GMP agreement, undertake early material procurement, site preparation, abatement/remediation, demolition, and/or advanced construction work.
  - Clearly define scope and bid packages to keep GCCM allowances in the GMP to a minimum.

#### **IV. SCOPE OF CONSTRUCTION SERVICES**

The GMP may be requested **DURING** the Construction Documents phase rather than after GC/CM buy-out is completed. No construction activities shall be allowed to commence until additional funding and authorization is received from the 66<sup>th</sup> Legislative Session. The established GMP will be the maximum amount paid for the construction, unless scope changes are requested and approved by the Owner. 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, the GC/CM will be required to submit a 100% performance and 100% payment bond for the amount of the GMP. The Owner retains the option to cancel the construction phase services, or to start a new selection process for the construction of the Project, or terminate the contract and negotiate a replacement contract with the next highest rated Proposer from this solicitation, or to conclude the GC/CM's services at pre-construction and issue the Project on a lowest, responsible bidder method.

The State of Montana Wage Rates incorporated in this RFQ are provided for informational purposes only. The selected GC/CM will be required to comply (as a minimum allowable rate schedule) with those Rates adopted and effective at the time of signing the GMP Agreement/Amendment. All reporting, documentation, etc. shall remain as per the State

requirements. This project is subject to all State requirements as outlined in the Montana Code Annotated (MCA) and Montana University System Board of Regents Policies.

At this time, the Owner is excluding construction services for the EHHD and ROTC projects from the GC/CM’s services and is intending to award these two (2) projects on a lowest, responsible bid. However, the Owner retains the options to add all or any portion of assistance with occupant moving, provision of temporary space, full pre-construction services, and/or construction phase services to the GC/CM contract and scope for either/both of these two (2) projects if it determines it is in its best interest to do so.

**V. 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 Contractors who will then be required to submit detailed information regarding project-specific capabilities, experience, and costs.

The Owner’s selection committee will consist of members from MSU, State A&E and CTA Architects Engineers. The selection committee 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 5 (5 being highest rating) by the selection committee and weighted in accordance with the importance of each item. Ratings will be determined by consensus 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 “3” rating in# 5 and #6 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. Bonding Capacity	----	----	Prerequisite
3. Safety	----	----	Prerequisite
4. MT Construction Contractor Registration	----	----	Prerequisite
5. GC/CM Firm Information	0-5	5	25
6. Specific Project Experience Information	0-5	5	25
7. Business Entities Other Than Corporations	----	----	Per 1 through 6 above
TOTAL:			50

*CAUTION: Firms shall NOT propose either verbally or in writing any form of donations, contributions, gifts, assistance, or offsets to the project or the University or that could have the appearance of such. Doing so may result in disqualification.*

NOTE: If submitting as an entity other than an incorporated firm (e.g. partnership or joint-venture) or other arrangement (e.g. a contractual teaming relationship), provide ALL the below information for the individual members of the entity or arrangement AND for the entity or arrangement.

Proposers must meet certain minimum Qualification Conditions in order to be eligible to submit a Proposal. The Owner has identified the following Qualification Conditions:

1. Statement of Qualifications must be signed by an officer or principal of your firm.  
**(PREREQUISITE)**
2. 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 \$25 million 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 of \$25 million please provide:
    - Bonding company and agent, with phone and email contact information;
    - Years of relationship;
    - If less than 5 years, or not your exclusive source, name all others used in the last 5 years; and,
    - If less than 5 years, or not your exclusive source, provide additional explanation regarding any transitions or changes.
3. 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 Owner. The Owner reserves the sole right to waive the pass/fail requirement if, in the Owner's sole judgment, sufficient justification exists for any explanation provided. The Owner 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.
4. Include evidence of valid Montana Contractor Registration. **(PREREQUISITE)**
5. General Contractor / Construction Manager Firm Information:

- a) Demonstrate successful experience and capacity to act as a GC/CM on renovation projects with a construction value of \$25million.
  - b) Describe your firm's GC/CM approach specific to Pre-Construction services, Project estimates, Project schedules, Bid Packages, and balancing value and budget to make cost-saving changes or value enhancements.
  - c) List other projects, both private and public, that will be concurrent with the schedule stated in this RFQ for this project.
  - d) Along with current backlog in dollars, provide workload in terms of total contract values or annual business volume for the last 3 years. Potential future workload coincident to this project's schedule is also requested.
  - e) What three unique approaches and practices used by your firm differentiate the firm from competitors in the ability to provide exceptional preconstruction service.
6. Specific Project Experience Information:
- a) List 3 specific project examples demonstrating experience and capacity to act as a GC/CM on:
    - Historic structures with significant components and character-defining features. It is anticipated the RFP criteria will necessitate the assigned project manager and superintendent to have historic renovation and/or restoration project experience on the National Historic Register (or Register-eligible) projects.
    - Multifaceted renovation projects greater than or equal to \$25 million construction value.
    - University or College projects with limited site boundary conditions.
    - Experience with early work packages that may include abatement/remediation and demolition prior to execution of a GMP amendment.
    - Similar projects requiring strategies to successfully complete construction within the anticipated timeline.
    - LEED, Green Globes, or other 3rd-party certified building projects and/or projects utilizing sustainable systems/strategies in construction. Must be at least a LEED Silver, Two Green Globes level, or equivalent. Proposer should include a list of all such certified projects giving level of certification achieved, total contract dollar value, total gross square footage, and type of facility.
  - b) Identify your firm's strengths, preconstruction and construction in relation to experience requirements stated above for renovation projects, limited site staging/access, and careful demolition techniques that respect and protect the historic nature of buildings.
  - c) In the last ten years, have you (if you answer "yes", provide full explanation):
    - Had an Owner claim against Performance Bond?
    - Been declared in default and/or terminated on a project?
    - Assessed liquidated damages for delay in delivery of project?
    - Taken legal action, filed liens, or dispute resolution proceedings of any kind against an Owner for anything other than non-payment for accepted work?
7. Business Entities Other than Corporations
- a) If submitting as a Partnerships/Joint-Venture, please contact the State A&E Division for additional information and specific requirements.

## VI. SUBMITTAL OF INFORMATION

Two (2) paper copies and one electronic PDF of the written response to this RFQ must be **received** at:

Architecture & Engineering Division, State of Montana  
(Room 33, Metcalf Building, 1520 East 6<sup>th</sup> Avenue)  
Department of Administration  
PO Box 200103  
Helena, MT 59620-0103

**By October 04, 2018; 2:00 p.m. MST.**

Electronic PDF copy may be emailed prior to the closing time to [DOAAEDivision@mt.gov](mailto:DOAAEDivision@mt.gov), [bwarfle@mt.gov](mailto:bwarfle@mt.gov), or sent ftp to [bwarfle@mt.gov](mailto:bwarfle@mt.gov) by use of the State's e-Pass file transfer service, <https://app.mt.gov/epass/Authn/selectIDP.html> (a free account will need to be created for use of e-Pass)

**e-Pass MUST be used for files larger than 10MB**

ALL QUESTIONS REGARDING THIS RFQ MUST BE SUBMITTED **IN WRITING** (email is acceptable) **BY September 27, 2018**, TO:

Bob Warfle-P.E. , Engineering Manager  
(406) 444-0771; fax (406) 444-3399  
[bwarfle@mt.gov](mailto:bwarfle@mt.gov) or [DOAAEDivision@mt.gov](mailto:DOAAEDivision@mt.gov)

## VII. INSTRUCTIONS TO PROPOSERS

Statements of Qualification must:

1. Follow the format outlined in the Selection Procedure above.
2. Be **SIGNED** by an officer or principal of your firm.
3. Be contained in a document not to exceed 15 sheets total (printed single or double-sided pages) including whatever pictures, charts, graphs, tables, and text the firm deems appropriate to be part of the review of the firm's qualifications. A transmittal letter, section dividers, and cover/backing sheets, are exempted from the page limit. Page size limit is 8-1/2 x 11 inches, with basic text information no smaller than 10-point font.

CLAIMS FOR TRADE SECRET AND/OR CONFIDENTIALITY:

Public agencies in Montana are required by Montana law to permit the public to examine documents that are kept or maintained by public agencies, other than those legitimately meeting the provisions of Montana's Uniform Trade Secrets Act, Mont. Code Ann. §§ 30-14-401, et seq., and that the State is required to review claims of trade secret confidentiality.

Information separated out under this process will be available for review only by the procurement officer, the evaluator/evaluation committee members, and limited other designees. Offerors shall pay all of its legal costs and related fees and expenses associated with defending a claim for confidentiality should another party submit a "right to know" (open records) request.

For a claim of confidentiality to be considered by a public agency, all trade secret confidentiality information must be segregated and be accompanied by the Trade Secret Confidentiality Affidavit available <http://vendorresources.mt.gov/VendorForms>. This affidavit must be fully completed and submitted to the State along with the RFQ/RFP, and the following conditions must be met:

- a) Confidential information (including any provided in electronic media) to be withheld under a claim of confidentiality must be clearly marked and separated from the rest of the qualifications or proposal;
- b) the qualification or proposal may not contain trade secret matter or confidential information related to the cost or price; and,
- c) a full explanation of the validity of this trade secret claim attached to the affidavit.

#### **VIII. ATTACHMENTS**

The following exhibits are incorporated in this RFQ:

Attachment A: Montana Prevailing Wage Rates for Building Construction 2018 (available at <http://erd.dli.mt.gov/labor-standards/state-prevailing-wage-rates>).

Attachment B: Romney Hall – Programming Study, October 7, 2016. Available from CTA.

Attachment C: Romney Gym Adaptive Reuse Study and Appendix, 50% Programming Draft, August 2013. Available from CTA.

Attachment D: Romney Hall - Design Development Documents. Available from CTA

Attachment E – EHHD & ROTC Construction Documents. Available from CTA.

**END OF RFQ**