

REQUEST FOR QUALIFICATIONS OWNERS CONSTRUCTION REPRESENTATIVE

Submittal Due Date / Delivery Requirements – March 13, 2024/Danny L. Johnston,
Superintendent/Procurement Officer

Clearly mark the outside of your submittal as “Response to Request for Qualifications: Owners
Construction Representative, Shields Valley School District.”

Deliver 1 Electronic copy via email, addressed to the Superintendent or Procurement Officer

djohnston@shieldsvalleyschools.org

Owner Contact: Danny L. Johnston, Superintendent

All official communication with Candidates and questions regarding this RFQ will be via email to the
Owner Contact listed above. No inquiries will be accepted after the submittal deadline, as indicated in
the project schedule.

Project Schedule

Advertisement Dates:	February 25 & March 3, 2024
RFQ Available:	February 26, 2024
RFQ Submittal Deadline:	March 13, 2024
Interview Invitations:	March 14, 2024
Interviews:	March 22, 2024
Candidates Notified of Selection:	March 25, 2024
Candidates Board Approval:	March 27, 2024
Notice to Proceed Given to Successful Candidate	March 28, 2024
(Pending Board of Trustee Approval)	

Project Background

Shields Valley School District seeks to immediately engage the services of a firm or individual to manage
all aspects of the design and construction of numerous building projects in the Elementary/High School
district. The pending bond amount for the projects totals just over \$15 million, spread across three
different school buildings and two campuses in Wilsall and Clyde Park. The project length is anticipated
to span until Q1 2025.

RFQ Objective

The purpose of this RFQ is to select a Qualified Owner Construction Representative (Candidate) to contract with the Owner and also work closely with the Project Team to provide customary owner's construction representative services for the prebond, bond, preconstruction, construction, and post-occupancy phases of the project in addition to providing customary Owner's Construction Representative / Construction Management Advisor services.

Project

The Project Team includes three main components

- 1) Owner: Shields Valley School District represented by the Board of Trustees and Administration and assisted by the Owner's Construction Representative.
- 2) Design Teams: Architects, Engineers, and specialized design disciplines. The Owner's Construction Representative will assist the district in proper public selection procedures following MCA 18-8-204; Procedures for selection of architectural and engineering services.
- 3) Construction Team: The Owner's Construction Representative shall assist the district in proper public procurement methods following the MCA; Title 18 Public Contracts, which may include Alternative Project Delivery Contracts

Selection Process Compensation

No compensation is offered for the Owner's Construction Representative Selection process.

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.

Submittal Requirements

Organize your RFQ response using the following outline. Please separate each section with dividers or tabs using appropriate section labels.

1. Cover letter / statement of interest
2. The preferred individual or firm should possess the following:
 - a. Identify the individual who will be the main point of contact.
 - b. A minimum of 10 years of experience in a construction-related field as Owner's Construction Representative on projects with construction costs in excess of \$10,000,000 and a degree in Engineering, Engineering Technology, Architecture, or Construction Management.

- c. Provide all team members experience and responsibilities, including their resumes.
- d. Describe your firm's past experience with providing Owner's Construction Representation, highlighting any projects with similar size, scope, and delivery methods used.
- e. How does your firm provide an indepth cost evaluation of proposals, fees, budgets and construction change orders?
- f. Ability to develop creative and cost-effective solutions to problems.
- g. A working knowledge of local building systems, codes, and regulatory requirements.
- h. Demonstrate ability to professionally represent the District's interests in all phases of the project(s) design, management, construction, inspection, and acceptance.
- i. Show your ability/approach to overseeing project schedules.
- j. Describe your firm's knowledge with the design/bid/build and alternative delivery method.
- k. Based on the number of projects your firm currently has under contract or in negotiation, does your firm have the capacity to complete projects of this size? What percentage of your firm is currently involved in other projects?
- l. This project requires the candidate to carry, at a minimum, general liability and professional liability insurance (\$1,000,000 - \$ 2,000,000) and worker's compensation according to the State Law.
- m. Demonstrate ability to manage and develop a master budget and maintain it accurately throughout the project to ensure a quality project is delivered within budget.
- n. Demonstrate a working knowledge in some or all disciplines, including architectural design, structural engineering, mechanical engineering, electrical engineering, civil engineering, roof design and maintenance, construction cost estimating, facility management and maintenance, and information technology (word, excel, accounting). Indicate which disciplines you are knowledgeable and have expertise and/or experience.
- o. Describe understanding of Bonding, Permitting, and Insurance requirements for publicly funded construction.
- p. How does your firm enforce and encourage high safety standards on occupied construction sites?
- q. Demonstrate how you have worked with other design/build teams to deliver more value to your client than they expected.

r. Please explain your firm's role in construction administration, including the observations and reporting your firm will complete for the project on behalf of the district. Please provide a sample of an OR field report from your firm.

3. Scope of Service

The Owner's Construction Representative is expected to act on the owner's behalf in overseeing the project through completion and into occupancy. Please provide a narrative of your approach to providing these services and explicitly identify any additions or exclusions. When appropriate, include the number of meetings, site visits, etc., and any other pertinent descriptions that clearly identify services included in the proposal.

4. References / Letters of recommendation from previous relevant experience with similar projects. Provide a comprehensive list of ALL school projects completed or begun within the last 10 years, with contact information, along with brief project description

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

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

Expectations (but not limited to)

Review and provide a written assessment of the Owner's project budget. Develop, monitor, and update the overall project schedule. Review and provide a written assessment of the Owner's project information, including the preliminary engineering report created by others. Strong verbal and written communication skills. Successful firm will attend public meetings as needed and/or required by Owner. Provide regular updates to the Board of Trustees. Produce, update and provide the Owners a complete project file. Coordinate, with the design team, the permitting process through local and state jurisdictions. Function as communication liaison between all parties. Provide written record of all substantive project communications and actions. Provide guidance to Owner on construction-related issues such as Change Orders, schedule adjustments, and other items that may develop during the course of the project. Provide project closeout coordination, including one-year warranty inspection. Represent the Owner's interests in all matters pertaining to the design, permitting, bidding, inspection, and construction of the proposed facilities Both parties may agree upon other duties. Generally protect the Owner's interests during the course of the project.

Further project information / Contact with Owner

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

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.

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.

Owner's Construction Representative Selection Process

Shields Valley School District contemplates hiring an Owners Representative over the course of these bond projects.

Proposed Process: Owner's Construction Representative Candidates will be assessed by a committee designated by the Owner on the following scale. The three candidates with the highest numeric scores will be "shortlisted" and may be invited to interview before the selection committee. Unsuccessful candidates will be notified immediately after the selection process is completed. After interviews, numeric scores will rank the three candidates, and the Owner will begin contract negotiations with the preferred candidate (highest score). 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 Owner and started anew with the second-ranked finalist, and thus until a suitable agreement can be reached. Candidate scores will be made public after the selection process has concluded.

Depending on the number and quality of submittals received, the Owner may choose to make the selection of the preferred Owner's Construction Representative Candidate based on the submittal information alone and may decline to conduct the interview stage of the selection process. In this case, the selection scoring will be made public as soon as the successful OCR is selected.

Candidate Assessment Scoring

Selection Criteria	Max Points Possible
1. Letter of Interest: How complete and concise was the letter of interest and the RFQ response? Was the RFQ well organized, with complete information responding to all submittal criteria?	15 points
2. Experience and Qualifications: Provided a comprehensive package which 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.	25 points

3. Scope of Services: Candidate has affirmed each of the owner’s requirements and expectations for this project and demonstrates clear knowledge of all elements of project procurement.	25 points
4. Subjective Fit: How well does the district candidate understand the district goals and mission	25 points
5. References: Candidate has provided a comprehensive project list with contact information for projects completed over the last ten years.	10 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 who 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 prequalify 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 resolicit, 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 publicly 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 Candidate's 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.