

# Request for Qualifications

Gallatin Gateway School

100 Mill Street

Gallatin Gateway, MT 59730

*Owner's Representative – Upcoming School Building Projects*

## **Project Background:**

In November 2019 the Gallatin Gateway School Board began the process of moving forward with a facility project. In March 2020, the Board hired the design-build team of Cushing Terrell/Martel to assist with the project. The Design-Build team along with our building committee held several meetings to develop a concept for the project. In May 2021, the District held a bond election with following bond language:

*Shall the Board of Trustees of School District No35 (Gallatin Gateway), Gallatin County, Montana (the "District"), be authorized to sell and issue general obligation bonds of the District in one or more series in the aggregate principal amount of up to Seven Million and No/ 100 Dollars (\$7,000,000.00), bearing interest at rates to be determined at the time of the sale, payable semiannually, during a term as to each series of bonds of not more than twenty (20) years, for the purpose of paying the costs of designing, constructing, remodeling, renovating, equipping, and furnishing improvements to the Gallatin Gateway school facilities consisting of the original 1915 school building and all adjacent buildings to accommodate growth and address safety concerns, to include renovating the school facilities to provide a new secure school entrance, additional and improved teaching and administration spaces, access improvements consistent with the Americans with Disabilities Act, and library upgrades; adding a new kitchen, teacher support space, and gymnasium and cafeteria seating; replacing aging systems and infrastructure, including upgrading mechanical, electrical, plumbing, fire alarm, and security systems; installing a fire suppression system; and making various site improvements; related improvements and costs; and paying costs associated with the sale and issuance of the bonds?*

On May 4, 2021, the bond failed 291 to 360.

The Gallatin Gateway School District ("District") would like to engage the services of an individual to manage all aspects of the pre-construction phases including design and planning on their behalf up to the running of a Bond with an anticipated election in May 2022. The District is seeking assistance with pre-construction services at this time and a separate agreement would be made contingent on a bond passing for the construction services outlined in the scope of the project.

Information regarding the May 2021 election can be found on the district website:

<https://www.gallatingatewayschool.com/About-Us/School-Board-of-Trustees/School-Bond-Election/index.html>

Information regarding the facility can be found on the district website:

<https://www.gallatingatewayschool.com/About-Us/School-Board-of-Trustees/Facility-Project/index.html>

## **Project Team**

The Project Team will be developed in two main groups:

- 1) **Owner**: The Gallatin Gateway School District, represented by the Board of Trustees, Administration and Building Committee. Assisted by the Owner's Representative.
- 2) **Design-Build Team**: Cushing Terrel/Martel. The Owner's Representative will assist in negotiating the amendment of the contract with Cushing Terrel based on the needs of the District for pre-bond services.

The preferred individual should possess the following:

- A minimum of at least 10 years of combined experience in land use project management with public relations experience for school projects with costs in excess of \$5,000,000 being weighted very heavily in the selection process.
- Previous experience as Owner's Representative with passing bond initiatives.
- Additional or equivalent Construction Management for high-value projects experience a plus.
- Demonstrated ability to successfully represent a District's interests in all phases of the pre-construction process, including but not limited to, project design, community relations, project management, construction planning, and acceptance by all parties.
- A working knowledge of construction processes, building systems, codes, and regulatory requirements, including jurisdictional and environmental compliance.
- Experience with AIA construction and architectural contracts, their modifications, and the working relationships between them.
- Ability to develop creative and cost-effective solutions to project obstacles, including community opposition.
- Experience working with a publicly funded board, including making public presentations to and for the community and the Board.
- Ability to mitigate adversity, create opportunities, pitch stories, maintain a positive image, cultivate strong media connections and build strategy for the successful passage of a bond initiative.
- Ability to maintain rapport and bridge communication chasms by cultivating and nurturing personal relationships within the community.
- Experience taking projects from the planning phase into the construction phase post-bond. An ability to promote an effective working environment among all parties involved in the project.
- Strong verbal and written communication skills.

Duties shall include, but are not limited to:

- Develop and present for review and approval all possible bond election strategies/concepts.
- Develop and implement a Project Plan, Tracking mechanisms and Reporting Tools that will be utilized for the duration of the project.
- Review and provide a written assessment of the Owner's project information, including the preliminary assessment and engineering report created by others.

- On behalf of the School District, build a working relationship with parents, land owners, and other community members, preparing and presenting proposals and other written materials, and acquiring their support for the passage of a Bond Initiative.
- Coordinate, facilitate, and lead District-sponsored community meetings, building tours, and other community engagement strategies.
- Responsible for all agendas, minutes, tracking and reporting from applicable meetings of any kind.
- Actively seek out, attend, and participate in local meetings and events where District representation would be beneficial to the project.
- Coordinate any further facility assessments deemed necessary for project scope.
- Review and provide a written assessment of the Owner's project budget and needs analysis. Develop, monitor, and report on the overall pre-construction and bond election schedule.
- Function as communication liaison between all parties. Provide written record of all substantive project communications and actions.
- Contract award recipient will be expected to attend monthly School Board Trustee meetings for the purpose of reporting project progress to the Board.
- Provide project closeout package and coordination.
- Generally, protect the Owner's interests during the course of the pre-construction process.
- Both parties may agree upon other duties.

**Owner's Representative Selection Process**

Proposed Process: Owner's Representative candidates will be assessed by a committee designated by the Owner on the following objective / subjective scale. The three candidates with the highest numeric scores will be "shortlisted" and 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.

Alternate Process: Depending on the number and quality of submittals received, the Owner may choose to make the selection of the preferred Owner's 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 selection is made.

Candidate assessment scoring (for preliminary RFQ round)

<b>Criteria</b>	<b>Points</b>
Previous experience as Owner's Representative with similar projects	25
References from previous School District for similar projects	10
Qualifications and experience of key personnel who will staff the project	15
Experience with governmental agencies with jurisdiction	15

Alignment with and understanding of District's goals and mission.	35
<b>Total possible points</b>	<b>100</b>

Candidate assessment scoring (for "shortlist" interview round – if conducted)

<b>Criteria</b>	<b>Points</b>
General approach to Gallatin Gateway School District project	30
Review and discussion of Owner's proposed budget and schedule	15
Concepts for moving forward	20
Alignment with and understanding of District's goals and mission.	20
Proposed fee structure	15
<b>Total possible points</b>	<b>100</b>

**Selection Schedule (dates are approximate and have not been finalized)**

RFQ available- July 1, 2021

RFQ Submittal deadline- August 2, 2021 at 3pm

Preferred Candidates shortlisted- August 12, 2021 (if this step is taken)

Shortlisted candidate interviews- August 16, 2021 (if this step is taken)

Selection finalized- August 18, 2021

**Selection Process Compensation**

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

**Owner's Representative Compensation**

Compensation for the successful candidate will be negotiated on a fair basis in conformance with normal industry standards. The candidate's proposed method of compensation will also be factored into the final fee negotiations, as well as utilized in the selection process.

**Submittal Requirements**

Candidates are asked to submit, at a minimum, the following information:

- Cover letter / statement of interest
- Description of the individual or firm's relevant experience with similar projects
- References / letters of recommendation from previous relevant experience with similar projects
- Description of staff who are proposed to be involved with this project, and their experience with similar projects

Owner's Representative candidates are asked to submit one original copy and one electronic copy (PDF-USB or via email) of their Request for Qualifications submittal packet. Submittals are to be mailed, emailed, and/or hand delivered to:

Gallatin Gateway School  
Carrie Fisher, District Clerk  
PO Box 265, 100 Mill Street  
Gallatin Gateway, MT 59730  
fisher@gallatingatewayschool.com

Clearly mark the outside of your submittal as “Response to Request for Qualifications: Owner’s Representative.”

**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 contacting:

Carrie Fisher, District Clerk  
[fisher@gallatingatewayschool.com](mailto:fisher@gallatingatewayschool.com)  
406-763-4415 ext. 36

Please keep your contacts to the minimum necessary to gain adequate information to prepare your submission. In addition to the staff, more information about the facility, the recent bond election, and proposed facility project/concept can be found on the District’s website: [www.gallatingatewayschool.com](http://www.gallatingatewayschool.com).

**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 and will be included in Board packets published on the District website..

**Disclaimer:** This RFQ does not form or constitute a contractual document. Gallatin Gateway School District shall not be liable for any loss, expense, damage or claim arising out of the advice given or not given or statements made or omitted to be made in connection with this RFQ. The District also will not be responsible for any expenses which may be incurred in the preparation of this RFQ or for other costs, including attorney fees associated with any challenges (administrative, judicial, or otherwise) to the determination of the highest-ranked Proposer and/or award of contract and/or rejection of a proposal. By submitting a proposal each Proposer agrees to be bound in this respect and waives all claims to such costs and fees. This RFQ is not to be construed as a contract or commitment of any kind. The District reserves the right to accept or reject any and all responses received as a result of this RFQ if it is in the District’s best interest to do so. All proposals are subject to Montana open records laws and will be reviewed by Board of Trustees in accordance with Montana open meeting laws.