

January Special Meeting Agenda

A special meeting of the Board of Trustees of School District #35 has been scheduled for **Friday, January 3, 2020 at 10am** at the **Gallatin Gateway School Board Room**. (All policies can be found at www.gallatingatewayschool.com.)

Call to Order

Presiding Trustee's explanation of procedures

Public Comment- Non Agenda Items- Sign in sheet

New Business

Review and consider:

- Owner's Representative Evaluation Rubric
- Owner's Representative Interview Questions
- Alternative Project Delivery Resolution
- Request for Qualifications (RFQ) for Preconstruction Phase Services & Construction Phase Services

Set times for Owner's Representative Interviews and Interview Format

Set agenda for January 15, 2020 Regular Meeting

Next Meetings:

Tuesday, January 7, 2020 at 1pm- Superintendent evaluation

Wednesday, January 15, 2020 at 5pm- regular meeting

Friday, February 7, 2020 at 10am- agenda setting

Adjournment

"The Gallatin Gateway School community empowers our students to take responsibility for their learning so they may achieve their individual potentials as lifelong learners and productive citizens."

Excerpt from GGS Policy #1441- Audience Participation

Audience Participation

The Board recognizes the value of public comment on educational issues and the importance of involving members of the public in its meetings. The Board also recognizes the statutory and constitutional rights of the public to participate in governmental operations. To allow fair and orderly expression of public comments, the Board will permit public participation through oral or written comments during the “public comment” section of the Board agenda and prior to a final decision on a matter of significant interest to the public. The Chairperson may control such comment to ensure an orderly progression of the meeting.

Individuals wishing to be heard by the Chairperson shall first be recognized by the Chairperson. Individuals, after identifying themselves, will proceed to make comments as briefly as the subject permits. The Chairperson may interrupt or terminate an individual’s statement when appropriate, including when statements are out of order, too lengthy, personally directed, abusive, obscene, or irrelevant. The Board as a whole shall have the final decision in determining the appropriateness of all such rulings. It is important for all participants to remember that Board meetings are held in public but are not public meetings. Members of the public shall be recognized and allowed input during the meeting, at the discretion of the Chairperson.

Cross Reference: 1420 School Board Meeting Procedure

Legal Reference: Article II, Section 8, Montana Constitution – Right of participation
Article II, Section 10, Montana Constitution – Right of privacy
§§ 2-3-101, et seq., MCA Notice and Opportunity to Be Heard

“The Gallatin Gateway School community empowers our students to take responsibility for their learning so they may achieve their individual potentials as lifelong learners and productive citizens.”

**MINUTES
SPECIAL MEETING
BOARD OF TRUSTEES, GALLATIN GATEWAY SCHOOL DISTRICT #35**

Call to Order

The Board of Trustees of the Gallatin Gateway School District #35 met at 10am Friday, January 3, 2020 in the Gallatin Gateway School Board Room. Vice-Chair Julie Fleury presided and called the meeting to order at 10:09am.

Trustees Present

Aaron Schwieterman, Board Chair (arrived at 10:32am); Julie Fleury, Board Vice-Chair; Mary Martin, Carissa Paulson

Trustees Absent

Patti Ringo

Staff Present

Theresa Keel, Superintendent; and Carrie Fisher, District Clerk

Others Present

Russ Olsen, R&R Taylor Construction

Presiding Trustee's Explanation of Procedures

Vice Chair Julie Fleury explained the public comment process to be followed for addressing the Board in accordance with Gallatin Gateway School policy. He noted: 1) that prior to a vote the public may comment on agenda items; 2) there will be time for public comment on non-agenda items; and 3) public comment periods are not intended to be a question and answer session.

Public Comment on Non- Agenda Items

None

Vice Chair Julie Fleury changed the order of business to accommodate Board Chair Aaron Schwieterman's late arrival to the meeting.

Set agenda for January 15, 2020 regular meeting

Vice Chair Julie Fleury led a discussion regarding the agenda for the January 15, 2019 regular meeting. The individuals present discussed agenda items to be included on the agenda and District Clerk Carrie Fisher will finalize the agenda with the Superintendent.

NEW BUSINESS

Review and Consider Owner's Representative Evaluation Rubric

The Board reviewed and discussed the evaluation rubric. Specifically, the Board discussed changing the max point value for the selection criteria to ensure the priorities of the Board were adequately weighted during the selection process.

Motion: Vice Chair Julie Fleury to approve the Owner's Representative Evaluation Rubric with changes discussed during the meeting.

Seconded: Trustee Mary Martin

Public Comment: Russ Olsen

For: Fleury, Martin, Paulson, Schwieterman

Opposed: None

Motion passed unanimously

Review and consider Owner's Representative Interview Questions

The Board reviewed the proposed interview questions and suggested some minor wording changes.

Motion: Trustee Carissa Paulson to approve the interview questions for the owner's representative with discussed changes.

Seconded: Trustee Mary Martin

Public Comment: None

For: Fleury, Martin, Paulson, Ringo, Schwieterman

Opposed: None

Motion passed unanimously

Review and consider Alternative Project Delivery Resolution

Based on information received during the December 18, 2019 regular meeting the Board was presented with a resolution for Alternative Project Delivery. The resolution was developed by MTSBA and District Clerk Carrie Fisher explained that the Board would need to adopt the resolution as presented if they wished to pursue the design-build concept for the upcoming facility construction project they are considering. Once adopted, if the Board later changes its mind about pursuing a design-build approach to the project they would need to rescind the resolution.

Motion: Trustee Mary Martin to adopt the Alternative Project Delivery Resolution as follows:

WHEREAS, the Gallatin Gateway School District Board of Trustees has begun initial plans to renovate the District's existing facilities, including but not limited to infrastructure systems to maximize the use, efficiency, utility and operational costs of such systems. Potential new construction may be included within the scope of the anticipated project depending upon the input, analysis and recommendations of architects, engineers, and other professionals retained by the District to assist with this project.

WHEREAS, the Trustees have determined that proceeding with an alternative project delivery contract to complete this project is in the best interests of the District.

WHEREAS, the Trustees have or will have knowledgeable staff or consultants who have the capacity to manage an alternative project delivery contract; and

WHEREAS, the Trustees anticipate that using an alternative project delivery contract will meet the following two sets of criteria as described in MCA 18-2-502(2)(a) through (2)(c);

- 1) the project has significant schedule ramifications and using the alternative project delivery contract is necessary to meet critical deadlines by shortening the duration of construction by means of less or a shorter duration of disruption to the school setting as a public facility; and
- 2) by using an alternative project delivery contract, the design process will contribute to significant cost savings to directly benefit the taxpayers of the school district; and

WHEREAS, the Trustees have determined that using an alternative project delivery contract will not encourage favoritism or bias in awarding such a contract or will not substantially diminish competition for the contract.

WHEREAS, a copy of the Request for Qualifications for Preconstruction Phase Services and Construction Phase Services is attached hereto and incorporated herein as if set forth in full.

NOW, THEREFORE, BE IT RESOLVED, that the Board of Trustees of Gallatin Gateway School District, Gallatin County, Gallatin Gateway, Montana, intend to enter into an alternative project delivery contract for the project stated above.

Seconded: Trustee Mary Martin

Public Comment: None

For: Fleury, Martin, Paulson, Schwieterman

Opposed: None

Motion passed unanimously

Review and consider Request for Qualifications (RFQ) for PreConstruction Phase Services & Construction Phase Services

District Clerk Carrie Fisher provided the Board with a draft RFQ for PreConstruction Phase Services & Construction Phase Services developed by MTSBA. She explained that since the Board has decided to move forward with the design-build approach for a facility project the next step in the process is to hire a design-build team. The Board discussed the timeline, scope of services, bonding capacity for qualified firms, the criteria for which they will be evaluating qualified firms' proposals. The Board indicated the following: RFQ due- February 13, 2019 at 3pm, Interviews/Selection- February 24-28, 2020; Award date- March 11, 2020; bonding capacity- at least \$10million; project experience- \$5million-\$50million; and to add "Facilitate a comprehensive needs assessment to determine the District's need for new construction and/or renovation of District facilities." to the scope of services.

Motion: Trustee Carissa Paulson to approve RFQ document with discussed changes.

Seconded: Trustee Mary Martin

Public Comment: Russ Olsen

For: Fleury, Martin, Paulson, Schwieterman

Opposed: None

Motion passed unanimously

The final RFQ will be posted on the District website, sent to the Bozeman Builder Exchange, and a legal ad will be placed in the *Bozeman Daily Chronicle* as soon as possible. In addition, the District Clerk will reach out to as many contractors as she can to invite them to review the District's RFQ.

Set times for Owner's Representative Interviews and Interview Format

The board established the following times and formats for the interviews. Interviews will be on Thursday, January 15, 2020 and will be no more than 1 hour in length, under the following format of maximum time allowed:

- 10 minutes- **Owner's Representative**- introduction
- 30 minutes- **School Board**- conduct interview (see attached questions)
- 10 minutes- **School Board**- follow-up questions based on interview
- 10 minutes- **Owner's Representative**- follow-up questions to the Board

In an effort to be consistent for all interviews and ensure efficiency each portion of the interview process will be timed. Interviews will be conducted beginning at 5pm on January 15, 2020. The Board will hold its regular meeting at the completion of interviews. The Board will not be making a final decision/selection at this meeting, but rather wait until after the design-build RFQ's are returned and reviewed.

Approximate interview schedule:

1. 5:05pm- Daniel McGee- Building, Mind, and Body, LLC
2. 6:05pm- Mark Qualman- QuEst Services Corp

Next Meetings:

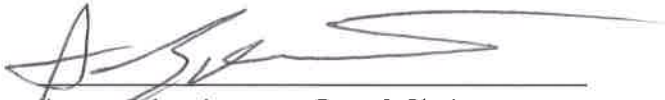
Tuesday, January 7, 2020 at 1pm- Superintendent evaluation


Wednesday, January 15, 2020 at 5pm- regular meeting

Friday, February 7, 2020 at 10am- agenda setting

Adjournment

Board Chair Aaron Schwieterman adjourned the meeting at 12:17pm.



Aaron Schwieterman, Board Chair

Carrie Fisher, District Clerk



GALLATIN GATEWAY SCHOOL
PO BOX 265, GALLATIN GATEWAY, MT 59730

The agenda must also include a "public comment" item in order to allow members of the general public to comment on any public matter under the jurisdiction of the district that is not specifically listed on the agenda, except that no member of the public will be allowed to comment on contested cases, other adjudicative proceedings, or personnel matters. The Board Chairman may place reasonable time limits on any "public comment" item in order to maintain and ensure effective and efficient operations of the Board. The District shall not take any action on any matter discussed, unless the matter is specifically noticed on the agenda, and the public has been allowed the opportunity to comment.

** Public comment will be asked on each agenda item. Do not sign below for agenda items.*

Public Comment Sign-in

Date: January 3, 2020

**Please sign below for non-agenda items to be heard under New business: Public comment.*

NAME (Please Print Clearly)	TOPIC (Please Print Clearly)
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Special Meeting

January 3, 2020

Sign-in Sheet

<u>Name- please print</u>	<u>Signature</u>
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Owner's Representative Evaluation Rubric

Selection Criteria	Max Points Possible
1. RFQ - How complete were the RFQ Responses? Was the RFQ well organized, with complete information responding to all of the submittal criteria?	15 points
2. Experience & Qualifications - Provided a comprehensive package with highlight experience with key personnel who will staff the project (including resumes of key personnel). Demonstrated previous experience as Owner's Representative with similar projects (size and scope).	30 points
3. References - Provided a comprehensive project list for recent projects completed and references were reachable. Score will also include feedback from references.	10 points
4. Alignment with Scope of project - Demonstrated ability to meet the needs of the District and ability to guide the District through the project.	15 points
5. Subjective Fit - How well does the candidate(s) understand the district goals and mission? General approach, concepts of moving forward? Likeability for community outreach?	10 points
6. Community engagement and communication strategies - demonstrated ability to communicate effectively with the district and community. Has developed effective community engagement strategies to promote projects.	10 points
7. Cost and fee structure - provided the District with a competitive cost/fee structure.	10 points
Total Points	100 points

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INTERVIEW QUESTIONS FOR OWNER'S REPRESENTATIVE

1. Why are you interested in this project? What is unique about your team that sets you apart from other teams we are considering for this project.
2. Describe your philosophy/perspective on community, staff, and student involvement in these types of projects.
3. As you may be aware, our District has many deferred maintenance issues, an aging facility and a bonding capacity of around \$7 million. How will you help the District determine the best approach and project(s) to pursue during this project?
4. What experience do you have with non-traditional, state-of-the art design that lends itself to the needs of students for years to come?
5. Given the school and/or public work projects you have worked on, how many times have you not worked with a district to a project's completion? Why?
6. What do you consider to be the three most significant challenges/risks to the successful completion of this project, and how will you help to mitigate those challenges?
7. How familiar are you with:
 - a. (1) Montana's bidding laws applicable to public schools;
 - b. (2) Montana's Open meeting laws;
 - c. (3) Alternative Design Build Options.
8. How can you assure us that you would be a strong advocate and agent for the District, the students served and the community?
9. Please provide at least one example of a time you had to represent a client's interest in a difficult situation with an architect, contractor or other service provider.
10. The District is currently also considering a Design-Build model for the project and would like to know how you see the role of an owner's representative in this model?
 - a. Would you consider a design assist scope for your contract?

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ALTERNATE PROJECT DELIVERY RESOLUTION

At a special meeting of the Board of Trustees of the Gallatin Gateway School District, Gallatin Gateway, Montana, held on Friday, January 3, 2020, at 10 a.m. at the Gallatin Gateway School District Board Room, the following resolution was introduced:

WHEREAS, the Gallatin Gateway School District Board of Trustees has begun initial plans to renovate the District's existing facilities, including but not limited to infrastructure systems to maximize the use, efficiency, utility and operational costs of such systems. Potential new construction may be included within the scope of the anticipated project depending upon the input, analysis and recommendations of architects, engineers, and other professionals retained by the District to assist with this project.

WHEREAS, the Trustees have determined that proceed with an alternative project delivery contract to complete this project is in the best interests of the District.

WHEREAS, the Trustees have or will have knowledgeable staff or consultants who have the capacity to manage an alternative project delivery contract; and

WHEREAS, the Trustees anticipate that using an alternative project delivery contract will meet the following two sets of criteria as described in MCA 18-2-502(2)(a) through (2)(c);

- 1) the project has significant schedule ramifications and using the alternative project delivery contract is necessary to meet critical deadlines by shortening the duration of construction by means of less or a shorter duration of disruption to the school setting as a public facility; and
- 2) by using an alternative project delivery contract, the design process will contribute to significant cost savings to directly benefit the taxpayers of the school district; and

WHEREAS, the Trustees have determined that using an alternative project delivery contract will not encourage favoritism or bias in awarding such a contract or will not substantially diminish competition for the contract.

WHEREAS, a copy of the Request for Qualifications for Preconstruction Phase Services and Construction Phase Services is attached hereto and incorporated herein as if set forth in full.

NOW, THEREFORE, BE IT RESOLVED, that the Board of Trustees of Gallatin Gateway School District, Gallatin County, Gallatin Gateway, Montana, intend to enter into an alternative project delivery contract for the project stated above.

The Board of Trustees moved to adopt the resolution declaring the intent of the Gallatin Gateway School District Board of Trustees to enter into an alternative project delivery contract for the project as noted above at the regular meeting of the Board of Trustees.

Chair
Gallatin Gateway School District
Gallatin Gateway, Montana

ATTEST:

District Clerk
Gallatin Gateway School District
Gallatin Gateway, Montana

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January 3, 2020

Dear Qualified Design-Builders:

Gallatin Gateway School District, Gallatin Gateway, Montana, is seeking proposals from qualified Design-Build Firms for preconstruction and potentially construction phase services who meet the qualifications listed below:

Gallatin Gateway School District REQUEST FOR QUALIFICATIONS FOR PRECONSTRUCTION PHASE SERVICES CONSTRUCTION PHASE SERVICES

1. Introduction

Gallatin Gateway School District (hereinafter “the District” or “GGSD”), is seeking qualified firms to undertake preconstruction and potentially construction services for the Project described hereinbelow. The District, in its sole discretion, intends to enter into a Design-Build Contract with the selected Design-Build Firm that will include Preconstruction Services and identification of a Design-Build Fee and Fixed Costs for General Conditions Work, with provisions for adding Construction Services through acceptance of a Guaranteed Maximum Price (GMP). The GMP would include construction services through completion of the Project. Alternatively, the District may, at its sole discretion, choose not to continue the Design-Build Contract beyond the completion of preconstruction activities and solicit bids from qualified contractors for the construction of the Project.

As part of the Request for Qualification (“RFQ”) response, firms shall include sub-contractor or group of sub-contractors representing mechanical, electrical, and plumbing trades that the firm proposes to partner with for this project, including the identification of architects and engineers that will be providing applicable services.

The District will use the RFQ process to evaluate each of the proposers’ qualifications. A subsequent Request for Proposals (RFP) will be issued to all qualified Design-Build Firms, as determined by the District, who will then be required to submit detailed information regarding project-specific capabilities, experience, and costs. Design-Build selection will be determined from the Proposals submitted in response to the RFP document, interviews (in the discretion of the District), and any other information sought by the District to assess a firm’s ability to complete the project as anticipated.

The District envisions the process for the development of the design and the delivery of the project to be a collaborative process in which a qualified Design-Build Firm will participate as a partner with the District and the other members of the design and delivery team as determined by the District.

This RFQ shall not commit the District 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 District 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 Eighteenth Judicial District, Gallatin County.

By offering to perform services under this procurement process, all proposers agree to be bound by the federal and state laws, rules and regulations, including but not limited to applicable prevailing wage requirements, building codes, equal opportunity employment practices, safety, open meeting laws, public records laws, etc.

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Any and/or all work contemplated as described hereinbelow is contingent upon the financial capacity of the District, including but not limited to the passage of a bond election by the electors of the District.

Key Anticipated Milestones

- Issue RFQ: January 3, 2020
- RFQ Due: January 24, 2020
- Interviews/Selection: The week of February 3-14, 2020

(* Interviews may or may not occur and will be at the discretion of GGSD)

- Award: February 18, 2020
- Pre-referendum support, design services: March 2020 – November 2020
- Bond Vote: May 4, 2021
- Construction start: July 2021 – TBD (Dependent on final project scope)

The District 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 District 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.

2. Project Description

The purpose of this RFQ is to request proposals from Design-Build Firms who are qualified to develop and implement a comprehensive facility improvement program for the District. The intent of this RFQ is to provide the District with the means to renovate the facilities various and interrelated systems while realizing maximum life cycle value, construction coordination, utility and operational savings. Potential new construction shall be included based upon final design selection. These services will also include architectural requirements, engineering, cost estimating, master planning update/review, participation and support for public outreach and stakeholder meetings, and conceptual planning. Timely services to support GGSD's planning efforts and timely implementation of their project will be of the essence.

From the list of interested qualified firms, GGSD will select the firm which best suits the needs and intent regarding the proposed project. GGSD intends that the selected firm will provide both pre-construction services and potentially construction phase services. Upon completion of pre-construction services the successful firm will be required to provide a GMP (Guaranteed Maximum Price) for the completion of the project, if, in the sole discretion of the District, GGSD moves forward with construction services.

This project is an alternative delivery method under Montana Code Annotated Title 18, Chapter 2, Part 5 and that the traditional bid process will not be followed. The design and construction of the project is proposed to be funded by bond funds generated by the sale of bonds issued by the District. GGSD will administer all related contracts according to the terms and conditions of the award and applicable laws and guidelines. GGSD reserves the right not to select any respondent, for any reason, who provides a response.

3. Scope of Anticipated Pre-Construction 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 Design-Build Contract, based on the proposer's input as well as the District's requirements. In general, services are anticipated to include the following:

General scope of pre-construction services:

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- Review and analyze previous master plan documents
- Assist in conceptual design options (new build vs. remodel/addition)
- Provide conceptual cost estimates
- Provide renderings and 3D modeling as needed
- Participation and support for public outreach and stakeholder entities
- Participation in Gallatin Gateway School planning exercises
- Participation in presentations to the public and School Board
- General assistance in process/programing in support of District's effort to secure funding
- Detailed planning/Design

4. Scope of Potential Construction Services

Should the District decide, in its sole discretion to move forward with construction services, the Design-Build Firm will be required to submit a GMP for construction services. The established GMP will be the maximum amount paid for construction, unless scope changes are requested and approved by GGSD. 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 for construction services, the Design-Build Firm will be required to submit a 100% performance and 100% payment bond for the amount of the GMP.

GGSD retains, in its sole discretion, the option, including but not limited to, terminate the contract after the pre-construction phase and/or start a new selection process for the construction of the Project, if the project moves forward, using the alternative delivery method or the bidding process as provided in Montana law.

5. 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 Design-Build Firms, as determined by the District, who will then be required to submit detailed information regarding project-specific capabilities, experience, and costs.

The District 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 10 (10 being highest rating) by the District and weighted in accordance with the importance of each item. Ratings will be determined by consensus scoring 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 "6" rating in 9 and 10 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. Firm Profile and Identification of Project Team	----	----	Prerequisite

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3. References	----	----	Prerequisite
4. Local Presence	----	----	Prerequisite
5. Bonding Capacity	----	----	Prerequisite
6. Safety	----	----	Prerequisite
7. MT Construction Contractor Registration	----	----	Prerequisite
8. List subcontractors your firm proposes to partner with, including architectural and engineering services	----	----	Prerequisite
9. Design-Build Firm Information	0-10	3	30
10. Specific Project Experience Information	0-10	5	50
		TOTAL:	80

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

1. Statement of Qualifications must be signed by an officer or principal of your firm.
(PREREQUISITE)
2. Firm Profile and Identification of Project Team **(PREREQUISITE)**
 - Provide general information on the responding firm, including; name, business address, telephone number, officers of the firm, number of employees
 - Annual volume the last three years
 - Provide a list of the personnel to be used on their project, their responsibilities and their qualifications, and the contact person for this project.
3. References **(PREREQUISITE)**
The respondent shall include a reference list of at least three prior projects developed and implemented by the Project Team designated above demonstrating experience designing and constructing projects of similar scope. Their list will be used to determine the prior relevant work experience of the Design-Build Firm. References shall include contact names and phone numbers. A minimum of three similar contracts must be demonstrated. References for projects where the responding firm was not the prime contractor or where a design-build contract was not implemented are not acceptable.
4. Local Presence **(PREREQUISITE)**
The respondent shall provide the address and telephone number of the firm's office located nearest to the District.
5. 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 at least \$35 million or more depending upon the total anticipated cost of the project 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 noted above in a), please provide:
 - Bonding company and agent, with phone and email contact information;
 - Years of relationship;

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- 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.
6. 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 District. The District reserves the sole right to waive the pass/fail requirement if, in the District's sole judgment, sufficient justification exists for any explanation provided. The District 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.
7. Include evidence of valid Montana Contractor Registration. **(PREREQUISITE)**
8. Design-Build Firms should submit responses to this RFQ with a sub-contractor or group of sub-contractors representing architectural services, engineering services, mechanical, electrical, and plumbing trades that the firm proposes to partner with. **(PREREQUISITE)**
9. Design-Build Firm Information:
- a) Proposer must demonstrate successful experience and capacity to act as a Design-Build Firm on non-residential, renovation projects between **\$5M and \$50M construction value**.
 - b) Describe your firm's approach specific to Pre-Construction services, Project estimates, Project schedules, Bid Packages, and balancing value and budget to avoid value engineering (VE) efforts.
 - c) Proposer must list other projects, both private and public, that will be concurrent with the schedule stated in this RFQ for this project. Potential future workload coincident to this project's schedule is also requested.
 - d) Along with current backlog in dollars, provide workload in terms of total contract values or annual business volume for the last 3 years.
 - e) In the last five years, have you (if you answer "yes", provide full explanation):
 - Had an Owner claim against Performance Bond and/or initiate legal action against you?
 - 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?
10. Specific Project Experience Information:
- a) Provide a narrative of how your firm's approach to sub-contractor collaboration with the design team will bring value to the District by addressing the following:
 - Your firm's experience partnering with architectural, engineering, mechanical, electrical, plumbing subcontractor's during the design phase of projects, i.e., preconstruction services.
 - Sub-contractor ability to provide accurate cost estimates to the District at all stages of design.

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- b) Provide a narrative explaining your team's ability to integrate with the BIM component of the design process as described in pre-construction services.
- c) Proposer should provide **three** specific project examples demonstrating experience and capacity to act as a Design-Builder on:
 - Renovations in buildings with difficult existing constraints including structural, mechanical, electrical, and plumbing limitations.
 - Renovations with adjacencies to occupied space.
 - New Construction.
- d) Firm Background:
 - What three unique approaches and practices used at your firm differentiate your firm from competitors in your ability to provide excellent service to the District.

6. Response Format and Preparation Instructions

Responses must be submitted in the format outlined in this section. Provide one hard copy and one electronic copy to be received at the Gallatin Gateway School, 100 Mill Street., Gallatin Gateway, MT 59730 until **4:00PM MST, on Friday, January 24, 2020**. Each response will be reviewed to determine if it is complete prior to actual evaluation. The District reserves the right to eliminate from further consideration any response, which is deemed to be substantially or materially unresponsive to the requests for information contained in their section. It is requested by GGSD that all responses follow the format in the order outlined to facilitate evaluation of each response fairly.

Eligible Design-Build Firms are limited to those companies that can demonstrate successful implementation of similar projects. The contractor must also demonstrate, to the satisfaction of GGSD, their ability to organize, manage, and deliver a project of this type. Additional ability to manage guaranteed utility savings is required.

Statements of Qualification must be submitted with the identified information outlined in their document. Each RFQ response will be reviewed to determine if it is complete prior to actual evaluation.

Respondents shall use the prescribed format outlined in the Selection Procedure above. RFQ responses will be evaluated in light of the material and substantiating evidence presented in the proposal; not on the basis of what is inferred.

The selected contractor, if any, will be required to assume total responsibility for all services and solutions offered in its proposal, and required to meet the needs of GGSD through the entire project. The selected contractor will be considered the prime contractor and the sole point of contact with regard to all contractual matters.

Submission of a response grants permission to make inquiries concerning the respondent and its officers to any persons or firms deemed appropriate by GGSD. Any proprietary information that the contractor does not want disclosed to the public shall be so identified on each page in which it is found. Data or information so identified will be used by GGSD solely for the purpose of evaluation and contract negotiations.

If your company is interested in providing a proposal or if you have any questions or requests for information, please contact [REDACTED] at 406-763-4415.



Carrie Fisher <fisher@gallatingatewayschool.com>

Bond Election

Hayes, Casey <Casey.Hayes@gallatin.mt.gov>
To: Carrie Fisher <fisher@gallatingatewayschool.com>
Cc: "Semerad, Eric" <Eric.Semerad@gallatin.mt.gov>

Fri, Dec 20, 2019 at 4:43 PM

Hi Carrie,

Following up on our conversation from yesterday, Anderson Elementary School's recent bond election cost the district \$3,636.74. That district has about 300 less voters than Gallatin Gateway Elementary, so the cost of the election for your district would be greater.

Below are the dates that the school board should be aware of when they resolve to conduct an election for trustees and bonds/levies.

- February 25 = Trustees pass resolution calling for election
- March 1 = Preliminary data sheets available
- March 27 = Deadline to certify ballot language

We strongly encourage all school districts to conduct their 2020 elections in May. When federal elections occur, especially presidential elections, this office's resources are stretched to the limits. If the board should determine that they cannot meet the deadlines for the May election and have to call for a special election in 2020, this office may not be able to conduct the election on the school's behalf depending upon when it might occur.

We look forward to working with you in the coming year. Please let us know if there are any questions.

Casey R. Hayes

Election Manager

Gallatin County Election Dept.

311 West Main, Room 210

Bozeman, MT 59715

(406) 582-3055

casey.hayes@gallatin.mt.gov



Carrie Fisher <fisher@gallatingatewayschool.com>

Question about RFQ

5 messages

Carrie Fisher <fisher@gallatingatewayschool.com>
To: Kris Goss <kgoss@mtsba.org>

Tue, Dec 31, 2019 at 12:26 PM

Hi Kris,

Is this necessary if we only have a 7M bonding capacity-- *single-project bonding capacity of at least \$35 million*

I feel like this might prevent some of our local smaller contractors out from being able to bid on the project.

Thank you for your guidance!

Carrie Fisher
District Clerk
Gallatin Gateway School
PO Box 265
Gallatin Gateway, MT 59730
406.763.4415-phone
406-.763-4886-fax
www.gallatingatewayschool.com

Kris Goss <kgoss@mtsba.org>
To: Carrie Fisher <fisher@gallatingatewayschool.com>

Tue, Dec 31, 2019 at 1:53 PM

Carrie,

No, that portion is not required and can be removed or adjusted. It is a placeholder for larger projects.

Thanks,

Kris Goss

On Dec 31, 2019, at 12:27 PM, Carrie Fisher <fisher@gallatingatewayschool.com> wrote:

[Quoted text hidden]

This email has been scanned for spam and viruses by Proofpoint Essentials. Click [here](#) to report this email as spam.

Carrie Fisher <fisher@gallatingatewayschool.com>
To: Kris Goss <kgoss@mtsba.org>

Tue, Dec 31, 2019 at 3:37 PM

Thank you for the clarification.

Is there a minimum level we should have for a project?

Carrie Fisher
District Clerk
Gallatin Gateway School

12/31/2019

Gallatin Gateway School Mail - Question about RFQ

PO Box 265
Gallatin Gateway, MT 59730
406.763.4415-phone
406-.763-4886-fax
www.gallatingatewayschool.com

[Quoted text hidden]

Kris Goss <kgoss@mtsba.org>
To: Carrie Fisher <fisher@gallatingatewayschool.com>

Tue, Dec 31, 2019 at 3:44 PM

I would recommend a \$5 million minimum.

Thanks,

Kris

On Dec 31, 2019, at 3:37 PM, Carrie Fisher <fisher@gallatingatewayschool.com> wrote:

[Quoted text hidden]

Carrie Fisher <fisher@gallatingatewayschool.com>
To: Kris Goss <kgoss@mtsba.org>

Tue, Dec 31, 2019 at 4:21 PM

Ok, thank you.

I really appreciate your guidance!

Carrie Fisher
District Clerk
Gallatin Gateway School
PO Box 265
Gallatin Gateway, MT 59730
406.763.4415-phone
406-.763-4886-fax
www.gallatingatewayschool.com

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