# **REQUEST FOR QUALIFICATIONS**

# GENERAL CONTRACTOR / CONSTRUCTION MANAGER SERVICES

# **FACILITIES YARD RELOCATION**

MONTANA STATE UNIVERSITY
Bozeman, Montana
PPA#22-0006

# **University Facilities Management**

Montana State University PO Box 172760 Bozeman, MT 59717-2760

February 2023

#### I. INTRODUCTION

The State of Montana (Owner), is seeking qualified General Contractor / Construction Manager (GC/CM) firms to undertake preconstruction and possibly construction services for the Facilities Yard Relocation project on the Montana State University campus in Bozeman, MT.

The 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 potentially Fixed Costs for General Conditions Work, with provisions for adding Construction Services through Early Work Amendments and acceptance of a Guaranteed Maximum Price (GMP) by Contract amendment. The GMP would include construction services through completion of the Project. Alternatively, the 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.

The Owner will use the Request for Qualifications (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 the RFP document, interviews, and any other information sought by the Owner to assess a firm's ability to complete the project as required.

When selected, the GC/CM will function as part of a team composed of the Owner, the Building Committee, Architect/Engineer design team, Commissioning agent, and others as determined by the Owner.

This RFQ 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 effort is governed by the laws of the State of Montana and venue for all legal proceedings shall be the City of Bozeman, Gallatin 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, and safety regulations.

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

Montana State University Facilities yard and associated buildings currently occupy 81,805 SF of building space on approximately 8.5 acres in the southeast portion of campus along 7th Avenue and Grant Street. The project will relocate existing functions and consolidate operations into a more efficient layout to service campus. The Plew Building and Heat Plant will remain in their current locations and configurations. By relocating several obsolete structures on 7th Avenue, MSU is planning for future academic and institutional buildings along 7th Avenue that better align with campus growth.

The University also seeks to simultaneously consolidate operations staff and functions spread across other areas of the campus for improved collaboration and coordination. The Facilities Management business unit, including Facilities Services, Engineering & Utilities, Safety & Risk Management, Campus Planning, Design, & Construction, Accounting, and Human Resources, is intended to be collocated in one Facilities Management (FM) building. The University has identified space to the south and east of the current location for the relocation/consolidation scope.

The 66th legislature (2019) provided \$9M of initial construction authority under House Bills 5 (authority only approval). The Board of Regents provided \$2.0 million of planning and design authority for the project at the September 15, 2021 meeting. The Board of Regents provided \$10M of authority at the May 19, 2022 meeting to design, replace and install utility systems along 7<sup>th</sup> Avenue. In total, MSU has \$21M in authority on hand. MSU is pursuing an additional \$8M in this year's Legislative session. MSU intends to apply the current authority to initial utility work along 7th Avenue. MSU will then secure additional construction authority before completing the Facilities Yard project scope.

The Project is presently conceived to be constructed in several critical phases that must all align to finish the project within the essential target window:

- Vacating and minor renovations to the Records Storage building in summer 2023 so that Grounds and Irrigation Shop personnel and contents can move in summer 2023; existing shop will then be demolished to make way for new Facilities Management (FM) building construction in 2024;
- Vacating and demolishing Faculty Court houses in 2023 to make way for new Facilities Management (FM) building construction in 2024;
- Vacating Facilities Storage Units in summer/fall 2023 so they may be demolished to make way for grounds and nursery operation to be relocated from football stadium in 2024 and to make way for new FM building construction in 2024;
- Relocating grounds and nursery operation from space adjacent to football stadium to make way for planned Indoor Practice Facility in 2025;
- Relocate sewer line that runs through the existing Facilities Yard to avoid 7th Avenue utility tunnel and provide service to new FM building in 2024;

- Construction of a new 7th Avenue utility tunnel in the fall/winter of 2023 to provide utility infrastructure to three construction projects along 7th Avenue in 2025; also facilitates consolidation and streamlining of utilities that exist underneath the Facilities Yard currently;
- Coordinating fabrication of the utility tunnel sections in summer 2023 to reduce time of 7th Avenue road closures due to open excavations in fall 2023;
- Commencement of construction of the new FM building in the spring of 2024;
- Relocation of Facilities trades into the new facility in a phased approach in 2025 to limit disruption to campus maintenance and to allow for demolition of the existing aged structures; removing significant deferred maintenance liabilities and clearing the site for future academic facilities,
- Completion of the entire project by December 2025.

The scheduled approach for the project is to begin with an Early Work Amendment (EWA) for the tunnel along 7<sup>th</sup> Avenue, the sewer line through the yard, demolition of Faculty Court and Grounds/Irrigation building.

The building will adhere to the State of Montana High Performance Building design standards. The Owner expects the GC/CM will provide continual involvement through all phases of the project. Pre-construction services throughout all design phases will be essential to providing a well-coordinated outcome for this phased project.

The current authority/funding for this project is \$21M. The completed project will exceed this amount. MSU is pursuing additional authority/funding to complete the project. The Owner may choose to keep the same GC/CM for additional phases of the project as the authority/funding becomes available.

The total construction value is estimated at this time to be approximately \$20 million (estimated EWA for tunnel + GMP for building).

#### **Project Location and Site**

After a thorough analysis of suitable properties, the decision was made to consolidate the Facilities Management operations into one building on existing state-owned property between 3rd Avenue and 6th Avenue, north of Greek Way.

#### **Design Considerations**

Over its long history, the University's maintenance services has served as a center for campus maintenance, repairs and improvements. These groups are charged with the maintenance and operations of all university buildings, grounds, and infrastructure systems. As such, they provide the technical expertise to maintain and update over 5 million square feet of campus buildings as well as the landscaping and grounds maintenance throughout the 1,170-acre campus.

The organizational components that have been included in the planning for this new Facilities Maintenance building include Business Operations, Safety & Risk Management, Facilities

Services, Engineering & Utilities, Planning Design & Construction, and Facilities Maintenance Administration. In addition, the technical specialty trades within Engineering and Utilities include Engineering, Heating Plant, Heat Maintenance, and Refrigeration Maintenance. The technical specialty trades within Facilities Services consist of Carpenters, Electricians, Painters, Plumbers, Laborers, Locksmiths, Grounds, E-waste and Custodians.

The new building, and the associated service yard, is meant to provide shop facilities, office space, conference rooms, and vehicle and equipment parking while supporting a collaborative and safe working environment. The principal motivations for the project are threefold. First, the removal of trades buildings from the area between Sixth and Seventh Avenues will free up buildable sites for academic buildings along of the Seventh Avenue corridor. Second, most of the building stock currently occupied by the facilities maintenance groups are beyond their effective lifespans. The trades are primarily housed within WWII era Quonset huts that are inefficient from both a programmatic and energy use standpoint. And finally, is the desire to facilitate a much higher level of cooperation and collaboration between the various trades and departments within University Facilities Management. The consolidation of the various groups into a single facility will create a much higher level of interaction between individuals that are typically siloed by the current structure and will allow for a higher level of operational efficiency and exchange of information.

Project spatial needs have been identified to be 60,500 gross square feet (GSF).

Running in tandem with this programming effort is the conceptual design and cost analysis for an approximately 700-foot-long utilities tunnel extending south from Grant Street along Seventh Avenue. The construction of the tunnel will most likely be undertaken at an accelerated schedule so that its completion will better align with the needs of other projects along 7th Avenue.

The roughly 5 acre existing Facilities Yard is south east of the campus core on the south east corner of Grant and 7th Avenue. Current primary access is through a gate adjacent to the Plew Building. Vehicular traffic is limited to Grant, Kagy, 7th Avenue and adjacent service drives. Pedestrian access primarily follows that same pattern with some additional access points between Greek Way and the campus. To align with the goals of the future development of South campus, it is envisioned that 6th Avenue be transformed into a service road which will serve the east side of any future buildings along 7th Avenue.

Heavy truck traffic, including deliveries to Stores, container pickups, trash pickups, fuel deliveries, etc. primarily come from Kagy Blvd and north on 7th Ave. to the site. Vans and other work vehicles and equipment access primarily through a gate on the north end of the site, aligning with 6th Ave. Pedestrians currently cross the site at the southern half of the Facilities Yard. The north entrance to the Facilities Yard creates a point of conflict between Facilities traffic and pedestrians and bicyclists on Grant St. As future buildings are constructed along 7th Ave., this traffic will only increase. Relocating the main entrance to the Facilities Yard will help to reduce these conflicts and will create a dedicated access that takes heavy traffic away from primarily pedestrian and bicycle zones.

The proposed FML Building sits in a part of campus that keeps utilitarian uses somewhat separated from student and pedestrian areas, while also having quick access to adjacent 7th Ave. and Kagy Blvd, collector and arterial streets, respectively. The proposed site concept changes the primary site access to utilize an existing curb cut on 7th Ave., pushing the heavier truck traffic associated with Facilities south and further away from the pedestrian character along 7th Ave. and Grant. St.

The project will continue to evolve through the schematic design study, and the input of user groups, building committee and others, including the future GCCM addition to the team.

The selected GC/CM must be able to coordinate and integrate the design and construction of a complex project. Experience working with multiple entities is required.

For the design, the Owner has selected:

A&E Design 515 W. Aspen Street, Suite 200A Bozeman, MT 59715 (406) 451-7310 Principal-in-Charge, Brad Doll

For project management, the Owner has selected:

McKinstry
4135 Valley Commons Drive, Suite A
Bozeman, MT 59718
(406) 570-4304
Project Manager, Karen Hedglin

The Owner is ready to hire a GC/CM for pre-construction collaboration with the ownership and design team. The project is presently in the Schematic Design phase.

The following is the intended timeline for the project:

# GC/CM Selection:

Advertising dates: February 12, 19, 26, 2023

Last Date for Questions: February 22, 2020

Receipt of Qualifications: 2:00 p.m. on March 1, 2023 Review & Scoring by Committee: Week of March 6, 2023

Issue RFP to Qualified Firms: March 13, 2023
On-Site Q&A and Tour of Yard: March 21, 2023
Last Date for Questions: March 28, 2023

Receive Proposals:

Proposals Review:

Interviews:

Potential Follow-Up Questions/Responses:

Final Scoring & Selection:

2:00 p.m. on April 5, 2023

Week of April 10, 2023

Week of April 17, 2023

Week of April 17, 2023

Week of April 17, 2023

Design/Construction:

Completion of EWA CD set (tunnel):

Completion of SD set:

Tunnel Construction Begins:

Completion of DD set:

April 2023

March 2023

June 2023

July 2023

Tunnel Construction Complete:

Completion of CD set:

GMP Established:

Commence Construction:

Construction Complete:

Construction Complete:

Commission & Move-In:

November 2023

December 2023

January 2024

February 2024

February 2025

Spring 2025

#### III. SCOPE OF 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 GC/CM contract, based on the proposer's input as well as the owner's requirements. In general, services are anticipated to include the following:

#### 1. General goals

- Serve as a partner to the owner and design team
- 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 subcontractor market with a focus on providing quality, schedule, and budget value to the owner
- Provide timely information, estimates, and schemes, and participate in decisions regarding construction materials, methods, systems, phasing, sustainability and costs to assist in determining which are aimed at providing the highest quality building, constructed using the most sustainable construction materials and practices, and within the budget and schedule

# 2. 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 value engineering throughout the design process including value added items. Value engineering at the time of establishing EWAs and the GMP is unacceptable and does not meet the intent of this process.

#### 3. 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.
- 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 subcontractors
- Work with the Owner and design team on phasing, scheduling, and other strategies to complete construction of this scale of project <u>on or before</u> 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. 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 preconstruction
- 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. Bidding process

- Develop detailed and well-organized bid packages in coordination with design team
- Advertise, manage, and obtain bids per trade for Owner review
- 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, and/or advanced construction work
- Clearly define scope and bid packages to keep GC/CM allowances in the GMP to a minimum

#### IV. SCOPE OF CONSTRUCTION SERVICES

The GMP may be requested during the Construction Documents phase or after GC/CM buy-out is completed, either option at the Owner's discretion.

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.

# 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 representatives from the University Facilities Management team, McKinstry and A&E Design. 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 deliberations and 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 "3" rating in # 5, #6, and #7 below, and a minimum weighted total of 45 to be considered qualified to receive the RFP.

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. Tunnel/Heavy Civil Experience	0-5	5	25
6. GC/CM Firm Information	0-5	5	25
7. Specific Project Experience Information	0-5	5	25
8. Business Entities Other Than Corporations			Per 1 through 7
			above
		TOTAL:	75

CAUTION: Firms shall NOT propose either verbally or in writing any form of donations, contributions, gifts, assistance, or offsets to the project or the Historical Society 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. <u>Statement of Qualifications must be signed by an officer or principal of your firm.</u> (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 \$20 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 \$20 million, please provide:
  - i. Bonding company and agent, with phone and email contact information;
  - ii. Years of relationship;
  - iii. If less than 5 years, or not your exclusive source, name all others used in the last 5 years; and,
  - iv. 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. Tunnel/Heavy Civil experience:

- a) Describe your firm's experience with heavy civil or tunnel projects. List 2 specific project examples demonstrating experience and capacity to perform the tunnel scope of work. If the GC/CM does not have self-perform experience of this scope, the GC/CM may choose to list projects where this scope of work was performed by a subcontractor that the GC/CM coordinated and supervised directly.
- b) Describe your firms approach to scheduling/planning the fabrication of the precast sections and opening the street.
- c) Describe your firms approach to traffic control and trench safety for this work.
- d) Describe three challenges associated with this scope that your firm can proactively address.

# 6. General Contractor / Construction Manager Firm Information:

- a) Describe your firm's GC/CM approach specific to pre-construction services, Project estimates, Project schedules, constructability reviews, Bid Packages, and balancing value and budget to make cost-saving changes or value enhancements.
- b) List other projects, both private and public, that will be concurrent with the schedule stated in this RFQ for this project.
- c) 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 coincident workload and projected capacity for this project is also requested.
- d) What three lessons learned from previous MULTI-PHASED projects, or other relevant projects, would you plan to apply to this project?

#### 7. Specific Project Experience Information:

- a) List 3 specific project examples demonstrating experience and capacity to act as a GC/CM (or CM at Risk) on:
  - i. New structures with industrial shop components.
  - ii. Multiphased projects greater than or equal to \$20 million construction value.
  - iii. Projects with multiple building demolitions.
  - iv. Similar projects requiring strategies to successfully complete construction within the anticipated timeline.
  - v. References for each of the projects listed.
- b) Identify your firm's strengths, in both pre-construction and construction.
- c) What are your firms strengths in the training and commissioning phases of projects?
- d) In the last five years, have you (if you answer "yes", provide full explanation):
  - i. Had an Owner claim against your Performance Bond?
  - ii. Been declared in default and/or terminated on a project?
  - iii. Assessed damages for delay in delivery of project?
  - iv. Taken legal action, filed liens, or dispute resolution proceedings of any kind against an Owner for anything other than non-payment for accepted work?

# 8. Business Entities Other than Corporations

a) If submitting as a Partnerships/Joint-Venture, please contact the Project Manager for additional information and specific requirements.

#### VI. SUBMITTAL OF INFORMATION

One (1) electronic PDF copy to this RFQ must be **received** at:

**University Facilities Management** 

Montana State University
PO Box 172760
Bozeman, MT 59717-2760
karenh@mckinstry.com or pdc@montana.edu

BY MARCH 1, 2023 BY 2:00PM MDT

ALL QUESTIONS AND CONTACTS REGARDING THIS RFQ MUST BE ADDRESSED **IN WRITING** (email is acceptable) BY FEBRUARY 22, 2023, TO:

Karen Hedglin, Project Manager (406)-570-4304 karenh@mckinstry.com

#### 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 20 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-l/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 <a href="http://vendorresources.mt.gov/VendorForms">http://vendorresources.mt.gov/VendorForms</a>. 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 2023 (available at http://erd.dli.mt.gov/labor-standards/state-prevailing-wage-rates).

Attachment B: MSU Facilities Programming Book dated December 2022.

**END OF RFQ**