

HELENA SCHOOL DISTRICT #1
REQUEST FOR QUALIFICATION-OWNERS CONSTRUCTION REPRESENTATIVE
HIGH SCHOOL AND ELEMENTARY CAPITAL BOND PROJECTS

All official communication with Candidates and questions regarding this RFQ will be via email to the Owner Contact listed below. Submissions received after the **RFQ Submittal Deadline** as indicated in the project schedule will not be accepted.

Rex Wertz
Superintendent
1325 Poplar St. Helena, MT 59601
(406) 324-2025
rwertz@helenaschools.org
Cc. tverrill@helenaschools.org

Project Schedule

| | |
|----------------------------------|---------------------------------|
| RFQ Available | July 19, 2025 |
| RFQ Submittal Deadline | August 15, 2025, 1:00 pm |
| Statements Reviewed and Scored | August 18-19, 2025 |
| Tentative Interview Date(s) | August 20-21, 2025 |
| Selection | August 21, 2025 |
| Candidates Notified of Selection | On or Before August 22, 2025 |
| Submission for Board Approval | August 26, 2025 |

Project Background

Helena Public Schools is holding a high school bond and elementary school bond election on September 9, 2025. The proposed projects and upgrades include:

- New construction of a 1200-student capacity school at Helena High School
- Major renovation and new construction of a 1200-student capacity school at Capital High School
- New construction of a 450-student capacity school at Kessler Elementary

Project Name and Location:

- Helena High School, 1300 Billings Ave. Helena, MT 59601
- Capital High School, 100 Valley Dr. Helena, MT 59601
- Kessler Elementary School, 2420 Choteau Ave, Helena, MT 59601

The District commissioned preliminary plans for these projects for the capital bond process which can be accessed at: <https://www.helenaschoolbond.org>

RFQ Objective

Helena Public Schools seeks to engage the services of an individual or firm to act as the Owner's Representative to manage, on behalf of the District, all aspects of design and construction to the successful completion of the high school and elementary bond projects.

Project Team

The Project Team includes three main groups:

1. **Owner:** Helena Public Schools - Elementary School District represented by the Board of Trustees and Administration and assisted by the Owner's Construction Representative.
2. **Design Teams:** Architects, Engineers, and any other specialized design disciplines. The Owner's Construction Representative will assist in developing the solicitation and selection process for the design team.
3. **Construction Teams:** The method of project delivery has yet to be determined. The Owner's Construction Representative will provide guidance in soliciting and selecting the Construction Teams and/or developing a conventional public bidding scenario. As noted below, the available options are traditional bidding ("Design/Bid/Build") or Alternative Project Delivery.

Selection Process Compensation

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

Owner's Construction Representative Compensation

Compensation for the successful candidate(s) will be negotiated on a fair basis in conformance with normal industry standards.

Submitted Requirements

RFQ responses shall follow the outline below. Please separate each section with dividers or tabs using appropriate section labels.

1. Cover letter/ statement of interest
2. Team Members
 - a. Identify the individual who will be the main point of contact for the duration of the project.
 - b. Provide all team members, experience and responsibilities, including their resumes.
3. Preferred Individual or Firm Experience
 - a. A minimum of 10 years of experience in a construction related field as Owner's Construction Representative.
 - b. A B.S. degree in Engineering, Engineering Technology, Architecture, Construction Management, Construction Technology, or similar from an accredited college or university.
 - c. Experience with providing Owner's Construction Representation, highlighting any projects with similar size, scope, and delivery methods used.
 - d. The ability of your firm to provide an in-depth cost evaluation of proposals, fees, budgets, and construction change orders.
 - e. An ability to develop creative, cost-effective solutions to problems.
 - f. A working knowledge of local building systems, codes and regulatory requirements.
 - g. Ability to professionally represent the district's interests in all phases of the project(s) design, management, construction, inspection, and acceptance.
 - h. Ability/approach to overseeing project schedules.

- i. Knowledge with the design/bid/build and GCCM process.
 - j. A working knowledge of Montana laws on public contracts, bidding, and procurement methods.
 - k. This project requires the Candidate to carry, at a minimum, general liability and professional liability insurance (\$1,000,000/\$ 2,000,000), and workers compensation according to the State Law.
 - l. Ability to manage and develop a master budget and maintain it accurately throughout the project to ensure a quality project is delivered within budget.
 - m. A working knowledge in some or all disciplines including architectural design, structural engineering, construction cost estimating, facility management and maintenance, information technology (word, excel, accounting). Indicate which disciplines you are knowledgeable and have expertise and/or experience.
 - n. Understanding of Bonding, Permitting, and Insurance requirements for publicly funded construction projects.
 - o. Experience working with other design/build teams to deliver more value to your client than they expected.
4. Scope of Service: The Owner's Construction Representative will 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 additions or exclusions and any other pertinent descriptions that clearly identify the services included in the proposal.
5. 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 a brief project description.
6. Disclosure of any disciplinary actions or any civil or criminal claims, judgments, or suits on any previous projects, if any.
7. Each firm submitting a Statement of Qualifications shall submit six (6) paper copies and one (1) digital copy in PDF format of said Statement in a sealed

envelope to the Administration Office at 1325 Poplar Street, Helena, MT 59601 prominently marked with;

- a. Request for Qualifications Title: “High School and Elementary Capital Bond Projects”
- b. Due Date and Time
- c. Name of the organization submitting the Statement of Qualifications

Late, faxed, or emailed copies will not be accepted for consideration. It shall be the responsibility of the firm submitting the proposal to ensure that it has been properly received by the deadline. If a proposal is not legible, the District has the discretion determine that the proposal is non-responsive. Each proposing firm shall submit a proposal that is signed in ink by an authorized individual or officer of the firm submitting the response.

Duties of the selected Owner’s Construction Representative will include but are not limited to the following:

1. Review and provide a written assessment of the Owner's Project budget.
2. Develop, monitor, and update the overall project schedule.
3. Review and provide a written assessment of the Owner's project information, including the preliminary engineering report created by others.
4. Possess strong verbal and written communication skills. Successful firm will attend public meetings as needed and/or required by owner. Speak and make presentations on behalf of the project(s).
5. Provide regular updates to the Board of Trustees.
6. Produce, update, and provide the Owner a complete project file.
7. Coordinate, with the design team, the permitting process through the local and state jurisdictions.
8. Function as communication liaison between all parties. Provide written record of all substantive project communications and actions.
9. Provide guidance and input on selecting the constructions team, including discussions on the options of design/bid/build or alternate project delivery.

10. Coordinate negotiations on appropriate fees and scope of work with the design team (architect, engineers, and special consultants).
11. Provide guidance to Owner on construction issues such change orders, schedule adjustments, and other items that may develop during the course of the project.
12. Provide project closeout coordination, including a one-year warranty inspection.
13. Represent the Owner's interests in all matters pertaining to the design, permitting, bidding, inspection, and construction of the proposed facilities.
14. Both parties may agree upon other duties.
15. 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 facilities, or otherwise enhance their understanding of the project may do so by appointment with Todd J. Verrill, Director of Facilities. 1201 Boulder Ave. Helena, MT 59601, tverrill@helenaschools.org.

Acceptance or Rejection of Submittals

The Owner reserves the right to accept or reject any or all responses to the Request for Qualifications and the right to waive minor irregularities in the selection process. Proffering this solicitation does not obligate the Owner to retain or contract with an Owner's Construction Representative.

Owner's Construction Representative Selection Process

Process:

Owner's Construction Representative Candidates will be assessed by a committee designated by the Owner using the following scale. A maximum of three candidates with the highest numerical scores will 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. A recommendation to approve the selected candidate as the Owner's Construction Representative will be made to the Board of Trustees pending successful contract negotiations. After approval by the Board of Trustees, the Owner will begin contract

negotiations with the approved candidate (highest score). Candidates will be notified of the recommendation for approval of the selected candidate prior to the Board of Trustees' meeting. If the negotiations with the approved candidate are unsuccessful, negotiations will be formally terminated by the Owner and started with the second ranked finalist, and thus until a suitable agreement can be reached.

Alternate Process:

Depending on the number and quality of the submittals received, the Owner may choose to make a 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.

Candidate Assessment Scoring

| Selection Criteria | Maximum Points Possible |
|--|-------------------------|
| 1. Letter of interest: How complete and concise was the letter of interest and the RFQ Responses? Was the RFQ well organized, with complete information responding to all submittal criteria? | 10 Points |
| 2. Experience and Qualifications: Provide a comprehensive package which highlight experience with key personnel who will staff the project. Previous experience as Owner's Construction Representative with similar projects. Experience with governmental agencies with jurisdiction. | 30 Points |
| 3. Scope of Service: Candidate has affirmed the Owners requirements and expectations for this project and demonstrates a clear understanding of School Bonds and Project Delivery. | 25 Points |
| 4 . Subjective Fit: How well does the candidate(s) understand the district goals and mission? General approach, concepts of moving forward? | 15 Points |
| 5 . References: Candidate(s) has provided a comprehensive project list with contact information for projects completed over the last 10 years. | 20 Points |
| Total Points | 100 Points |

Interviews

An interview invitation will be sent out to the maximum of three Candidates with the highest RFQ submittal scores, unless the district chooses to not engage in interviews as explained herein. 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 to the team.

The apparent winner will be determined based on their total score: RFQ responses plus interview

Acceptance and Rejections

The Owner reserves the right to select any or reject any and all proposals in the best interest. The Owner also reserves the right to pre-qualify 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 re-solicit, waive all informalities not involving 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 property of the Owner once submitted, which could be publicly shared. By submitting a proposal all Candidates agree to the terms and conditions of the RFQ and the RFQ will become part of the awarded Candidate's contract. The Owner and Owner's legal counsel will submit a draft agreement to the selected candidate to be used on this project. The Owner and Owner's legal counsel will negotiate terms with the apparent winner prior to commencement of work. **The District reserves the right to terminate any selection of an Owner's Construction Representation, contract for such services, and/or the scope of the projects in the event of unsuccessful bond elections.**

By offering to perform services under this procurement, candidates agree to be bound by the laws of the State of Montana, including but not limited to: applicable wage rates, gross receipts taxes, building codes, Equal Opportunity Employment practices, safety, etc.