



Request for Qualifications and Proposals Carter County Museum Expansion & Renovation

Ekalaka, MT 59324

Request for Architectural & Engineering Qualifications and Proposals

The Carter County Geological Society, a 501(c)3 nonprofit organization located in Ekalaka, Montana, hereby requests Qualifications/Proposals from qualified design professionals for Design Services for the renovation and expansion of the Carter County Museum, located at 306 N. Main Street in Ekalaka, MT. The Carter County Geological Society (CCGS) will receive responses until 5:00 PM (MDT), Thursday, October 30, 2025.

Project Description: The success of the Carter County Museum (CCM) at generating enthusiasm in the region's cultural and natural history has resulted in a record of exponential growth in artifact and fossil collection, visitation, outreach, and program participation. As a result, the CCM is now requesting competitive proposals from licensed architectural firms (Architect) for full architectural and engineering design services for the development of design and construction documents for an approx. 5,800 S.F. renovation and approx. 15,000 S. F. expansion of the Carter County Museum. Once constructed, the building will be owned by Carter County, located in Ekalaka, MT, and operated by the CCM.

This project provides the opportunity for an Architectural Engineering Team to partner with CCM to support a project that will have significant impact on the social and economic development of Carter County and the surrounding region of Montana, Wyoming, and the Dakotas.

A non-mandatory, pre-proposal conference will be conducted on Thursday, September 18, 2025 at 2:00 PM (MDT) at the Carter County Museum, 306 N. Main Street, Ekalaka MT 59324. A tour of the existing facilities will follow the conference.

RFP Contact

Sabre Moore, Ph.D. Executive Director Carter County Museum PO Box 445, Ekalaka MT 59324 smoore@cartercountymuseum.org 406-775-6886

RFP Timeline

Release of RFP -- September 8, 2025 Pre-Proposal Conference -- Sept. 18, 2025 Last Addendum -- October 3, 2025 Proposals Due -- October 30, 2025 Announce Shortlist -- November 12, 2025 Interviews -- Nov. 13 - 26, 2025 Anticipated Announcement of Selection -- December 12, 2025

INFORMATION REGARDING PROPOSAL

Introduction

The Carter County Geological Society, doing business as the Carter County Museum (CCM) has received funding from private contributions, county government funds, loans, and the Montana Department of Commerce Montana Historic Preservation Grant program to renovate and expand the Carter County Museum and is accordingly soliciting this Request for Proposals for Architectural and Engineering design services. These efforts and activities are viewed as key tools for the renovation and expansion of the museum. Payment terms will be negotiated with the selected offeror

Work activities will include preparation of preliminary engineering and architecture reports, final design plans and specifications and construction inspection. Tasks and deliverables are further described below. The Architect will also be responsible for preparing the construction bid package and conducting the bid opening as well as overseeing the construction work once it begins.

This project involves the renovation of the current building, which includes ADA compliance, installation of an HVAC system and lighting, replacement of the existing roof and reinforcement of existing roof trusses, and landscaping and construction of a new ADA compliant expansion on property owned by Carter County and located adjacent to the existing museum.

This project will focus on three primary improvements and additions:

- <u>Guest Services:</u> A new entrance, lobby, reception area, and restrooms that provide essential amenities, create a positive initial experience, and create a welcoming atmosphere that prepares visitors to experience the museum.
- Exhibition Space: Serving as the core of the museum, the expanded space will seamlessly connect to the current space and offer additional space to display the museum's vast and diverse collections, artifacts, specimens, and exhibits, allowing visitors to immerse themselves in the museum's offerings and engage with the displays.
- <u>Museum Support Space:</u> Housing various functional spaces for the "behind the scenes" work required for the museum's smooth operation, this includes staff spaces, laboratories, offices, collections storage areas, and mechanical spaces.

The building will include all necessary mechanical, electrical, plumbing, and fire protection systems along with technology, audio visual, and security systems. The work also involves site work around the exterior of the proposed building including landscaping with native plants, a new on-site septic system, water well, and electrical infrastructure.

All elements of the design and construction process must meet Montana Public Works Standard Specifications. Particular attention will be paid to consultants who have experience with, and competence in, architectural design and construction methodology, historical preservation and museum design, and progressive, cost effective, energy efficient, and aesthetically-pleasing structures suitable for the intended uses of multi-faceted community-based museum facilities.

Scope of Work

The work to be performed by the Architect will include all architectural and engineering services required for the expansion and renovation of the Carter County Museum (See Attachment A). The scope of work will be in a single contract. Included with this request for proposals are construction requirements that comply with Montana Historic Preservation Grant (MHPG) award. The Architect may review our Montana Historic Preservation Grant application, which includes a description of the proposed project, including activities, budget, and other pertinent information by contacting Dr. Sabre Moore, Museum Executive Director, at smoore@cartercountymuseum.org

Proposals should address the ability of the bidder to comply with the requirements contained in the Bid Document Review Checklist. The Architect shall identify a detailed scope in the proposal as part of their understanding and approach to the project.

The Architect shall provide qualifications and experiences in Montana State Historic Preservation Office reporting requirements. The Architect will be asked to provide all supporting documentation to CCM in order to comply with Montana Historic Preservation Grant Program and other grant reporting requirements.

Compliance

Please note that as a project that incorporates private contributions, grants, government funds, and loans, all deliverables must comply with:

- Montana Public Works Standard Specifications
- Montana Environmental Policy Act
- *Environmental requirements:* Actions must comply with the environmental review requirements in accordance with <u>7 CFR part 1970</u>. Project planning and design must not only be responsive to the organization"s needs but must consider the environmental consequences of the proposed project. Project design must incorporate and integrate, where practicable, mitigation measures that avoid or minimize adverse environmental impacts.
- *Architectural barriers.* All facilities intended for or accessible to the public or in which physically handicapped persons may be employed must be developed in compliance with the Architectural Barriers Act of 1968 (42 U.S.C. 4151 et seq.) as implemented by 41 CFR 101-196, section 504 of the Rehabilitation Act of 1973 (42 U.S.C. 1474 et seq.) as implemented by 7 CFR parts 15 and 15b, and Titles II and III of the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 et seq.).
- *Energy/environment*. Project design shall consider cost effective energy-efficient and environmentally-sound products and services.

- Seismic safety. All new structures, fully or partially enclosed, used or intended for sheltering persons or property will be designed with appropriate seismic safety provisions in compliance with the Earthquake Hazards Reduction Act of 1977 (42 U.S.C. 7701 et seq.), and E.O. 12699, Seismic Safety of Federal and Federally Assisted or Regulated New Building Construction. Designs of components essential for system operation and substantial rehabilitation of structures that are used for sheltering persons or property shall incorporate seismic safety provisions to the extent practicable as specified in 7 CFR part 1792, subpart C.
- National Environmental Policy Act (NEPA) if triggered
- Davis-Bacon Act
- Civil Rights and ADA requirements

Project Design

The Architect will work with a team from the Carter County Museum (and other project partners as needed) to develop a Preliminary Architectural Report and a complete set of project design drawings and technical specifications.

Project Award

The Architect will work with CCM to ensure compliance with the federal requirements as identified in the attached Checklist for Bid Document Review, including the suggested and required bid package documents and the development of the package for approval/processing prior to advertisement.

Construction Administration

The Architect will work with the CCM to ensure compliance with the federal requirements identified in the attached Contracting Provisions for Construction Projects.

The Architect shall provide administration of the contract for construction as set forth in AIA document A201-2017, General Conditions of the Contract for Construction, unless a more current version is released prior to the date of the Architect/CCM agreement.

The Architect shall ensure that the final design for the Carter County Museum complies with all State Historic Preservation Office requirements, and Montana Historic Preservation ("MHP") grant requirements and budget.

Pursuant to this RFP, the "Services" shall consist of, and the successful Architect shall provide, architectural planning and design, and engineering design services for the Project, including, but not limited to, the following:

Schematic Plans, Renderings, and Presentation Documents

- 1. Conduct one or more workshops/charrettes with CCM staff, CCGS board, and regional partners to obtain input from stakeholders.
- 2. Prepare schematic level plans for the site to determine the most feasible designs to support exterior and interior spaces that meet the needs of the museum. Develop concept and circulation plans for the interior spaces identified above in this RFP.
- 3. Develop schematic level color renderings of proposed layouts (minimum three) accurately depicting entryways, parking areas, facilities (including structures, bike racks, etc.) and landscape buffers, and submit to CCM staff, CCGS board, and interested stakeholders for review and comment.
- 4. Submit files with final color renderings and schematics in electronic format (pdf, jpg).
- 5. Present renderings (MS PowerPoint, charts, display boards, and color renderings) at meetings as directed by CCM.
- 6. Furnish the CCM with a completed Preliminary Architecture Report and Preliminary Engineering Report.
- Assist in the selection of a final schematic design by presenting advantages and disadvantages of each option including probable construction costs for each option.
- 8. Refine project costs of the preferred option, including line-by-line breakout of all fees, architectural costs, construction costs, FF&E, technology, and contingencies.

Design Development

- 1. Provide a topographic/boundary/utility survey of the proposed site for use in the design and construction of new facilities.
- 2. Provide geotechnical investigation and report for use in the design and construction of new facilities.
- 3. Facilitate preliminary review with the governing code officials to ensure that the project is being designed to meet applicable codes.
- 4. Using the Preliminary Engineering Report (PER), prepare the final conceptual design, including a large format display board and electronic files.

- 5. To the extent possible, obtain information for existing water well and septic sewer systems that will serve the facility and identify and precisely locate all infrastructure and utilities. Determine the requirement for new services if existing systems are not adequately sized or are not sufficient for the completed Carter County Museum building.
- 6. Determine where interferences with existing utilities may occur because of the construction of this project and resolve any conflicts.

Plans, Specifications, and Estimates (PS&E)

- 1. Prepare construction drawings containing title sheet, general note sheet, plan sheets, typical cross section sheets, and detail sheets for the Project.
- 2. Plot typical cross sections to illustrate existing and proposed conditions.
- 3. Prepare complete project specifications, including special provisions and proposal forms.
- 4. Incorporate project specifications into construction contract documents provided by CCM, including a description for each bid item.
- 5. Submit 70% PS&E construction documents, including structural calculations, to CCM for review.
- 6. Address any comments generated from the 70% submittal.
- 7. Based on the input received from the previous submittal, complete the design and prepare final PS&E documents.
- 8. Submit 100% PS&E construction documents, including structural calculations, to CCM for review and to obtain preliminary approvals.
- 9. Submit a final set of PS&E documents (printed and electronic formats) with the necessary details and instructions to carry out the work in accordance with the approved construction phasing.

Construction Documents and Plan Information

- 1. Ensure plans and specifications comply with all applicable governmental and professional standards.
- 2. Develop a schedule for construction of the Project.
- 3. Confirm that Civil and Landscape documents conform with the Preliminary Engineering Report and approved topographic and property surveys.

- 4. Confirm that structural foundations and pavement and surfacing sections conform with the approved geotechnical report.
- 5. Attend the pre-bid meeting, attend the pre-construction meeting, and provide assistance during procurement and management of the construction phase of the Project.

Construction Management (in coordination with CCM's rep)

- 1. Provide traditional construction administration services:
 - a. The construction administration services provided by the Architect will be to assist with certain construction oversight services, including periodic on-site reviews.
 - b. The Architect shall review and make determinations regarding contractors' Shop Drawings, Submittals, Requests for Information (RFIs), product substitutions, change orders and other related documents.
 - c. The Architect shall participate in weekly CCM-Architect-Contractor (CAC) construction meetings. Participation shall be via virtual participation all weeks except when the Architect shall visit the site for the CAC meeting and on-site observation.
 - d. The Architect shall provide coordination to governmental and funding agencies as required, and shall help facilitate the coordination and communication activities with the general contractor, city, utility companies, and other agencies.
 - e. The Architect shall review Contractor's Payment Requests for accuracy.
 - f. The Architect shall review and negotiate construction change order requests and claims.
- 2. Coordinate with future construction contractors (if any) on behalf of CCM.
- 3. Assist with preconstruction conferences.
- 4. Perform periodic (at least once per month) in-person on-site observation.
- 5. Attend virtual weekly CCM-Architect-Contractor (CAC) project meetings.
- 6. Prepare change orders, as necessary.
- 7. Review construction materials for conformance with the Construction Documents.
- 8. Review shop drawings and product information submitted by the contractor.

- 9. Review construction tests and inspection reports from the CCM's 3rd party inspection agency.
- 10. Stay current and aware of critical construction operations, scheduling issues, and overall progress of the construction.
- 11. Coordinate with staff for CCM, CCGS Board, Contractor and other stakeholders to facilitate on-site observation during the construction period as needed.
- 12. Participate in the Substantial Completion Inspection and develop a punch list of items to be finished and/or corrected.
- 13. Participate in the final inspection and all closeout paperwork required by CCM and MHP.

Assistance during the Bidding Process

- 1. The Architect shall assist CCM during the bidding process. The Architect shall respond to questions from the prospective bidders, facilitate a pre-bid, and shall prepare written addenda as necessary.
- 2. The Architect shall review all bids submitted and make appropriate recommendations on contractors' abilities to complete the work. The Architect's review shall include the preparation of bid abstracts and a bid comparison document.
- 3. Please note that due to grant and other funding requirements, the CCM must be under contract with a construction contractor before September 31, 2026 for the expansion and renovation of the museum.

Final Record Drawings

The Architect shall require the general construction contractor maintain and complete an accurate set of "As-Built" drawings that will be finalized into a formal set of digital record drawings and delivered electronically to CCM. An electronic copy of the construction specifications shall also be provided to CCM.

Proposal Requirements

Company Information

- Name of firm, address of firm, telephone numbers
- Primary telephone and correspondence contact information
- Website

Federal Registration

Provide federal registration information. All companies submitting for this work
must be fully registered with sam.gov, eligible to receive federal funds, and
certify in their proposal that they are eligible to receive federal funds. The
Architect and all sub-consultants will be reviewed to ensure that each company
has not been banned from federal work.

Brief History of the Firm

- Size of firm/staff years in business
- Organizational chart of firm
- Location/Distance from Ekalaka

Design Team Background/Qualifications

- Architectural Team
 - Principal in Charge
 - Director of Design
 - Project Manager
 - Project Architect
 - Interior Design
 - Functional programming and space programming

Resumes of Team Members

- Name
- Phone Number
- Email
- Years of Service with Firm
- Education
- Professional Experience
- Pertinent Experience
- **Sub-Consultants** List sub-consultants that are part of the AE Team including but not limited to:
 - Landscape Architect

- Interior Design
- Civil Engineer
- Structural Engineer
- Mechanical/Electrical Engineer
- Technology Consultant
- Audio Visual Consultant
- Acoustics Consultant
- Security Consultant
- Please note: Any Museum/Curator Consultant will be CCM's professional staff and their partners.

Representative New Construction Projects

- List a minimum of three (3) projects completed by your firm that best represents a similar scope, budget, program and complexity. For each project, please include:
 - o Name, Completion Date, Location, Budget
 - o Graphic Description, Photographs
 - Total Square Footage
 - Cost per Square Foot Exclude Site Costs and Architectural Fees
 - Change Order Percentage

Design Processes

- Provide an explanation of your understanding of the project and how the unique cultural aspects of this project in a remote, rural area will be handled.
- Explain your firm's creative process to design a unique, innovative facility that excites staff and visitors to experience the new facilities.
- Explain how your firm manages expectations to deliver a project that is consistent with the budget and programmatic requirements.
- Explain how your firm ensures compliance with the Americans with Disabilities Act (ADA). Provide examples.
- Explain your firm's experience with historic preservation projects and renovations of historic buildings.

- Describe how your firm incorporates this aspect of design into its work.
 Provide examples
- Efficient energy usage.
 - Describe how your firm incorporates this aspect of design into its work.
 Provide examples.
- Construction Document Accuracy and Coordination.
 - Explain how your firm reviews documents for accuracy and coordination from discipline to discipline.
- Provide a proposed timeline for the design services of this project.

Architectural/Engineering Service

- Provide information on your current workload and how you would accommodate this project.
- Describe in detail the process you will follow from schematic approval through approval of the final design.
- Outline the design schedule you would implement to meet the expected construction and occupancy dates. Describe the methods you would use to maintain this schedule.
- Describe your method for consensus building, including your role, the methodology employed, the outcome, and a contact person for a recent project where you employed this method.
- Describe the types of problems you have encountered on similar projects, and explain what you did to resolve the problems and what you would do differently to avoid such problems on future projects.
- Describe how your firm can add value to this project and the process and include examples of situations from comparable projects where the owner realized tangible value.

Construction Costs

- Milestone estimates of probable construction costs are required at the following progress points of the project:
 - Schematic Design
 - Design Development
 - o 65% Construction Documents
 - o 95% Construction Documents

- o 100% Construction Documents
- Describe cost control methods you use and how you establish cost estimates.
- List the steps in your standard change order procedure.
- List Cost Estimate, Bid Amount, and Difference of at least 3 representative new construction projects in the past five years. Also, provide the cost per square foot of the building excluding all Site Costs and Professional Fees. For the same project, provide any changes in scope if appropriate and if this change in scope resulted in an increase in your fee.

Legal Concerns

- Explain the circumstances and outcome of any litigation, arbitration, or claims filed against your company by a client or any of the same you have filed against a client.
- Explain the circumstances and outcome of any litigation, arbitration, or claims filed against your company by any client or any of the same you have filed.

Fees

- Architects shall understand that the project is funded by Grants and if the grant funding is frozen or cancelled for any reason, the Architect and sub-consultants work on the project will also cease.
- All proposals shall be a cost reimbursement with an agreed maximum. The fee shall cover all services necessary for the successful execution of the project, including consultations, surveys, soil investigations, supervision, "as-built" drawings, and incidental costs.
- Proposals should break out fees for the professional services in accordance with:
 - Basic architect/engineer services (not to exceed prevailing fees for comparable services in the region).
 - Breakdown by phase and design discipline.
 - Geotechnical, survey or other supporting engineering services for the design should be broken out separately.
- **Note:** The contract for architect/engineer services may not be based on the use of the cost-plus-a percentage-of-cost or percentage of construction cost form of compensation.
- Provide information on your preliminary fee structure based on the scope indicated above, including anticipated reimbursable costs.

• Submit a schedule of hourly rates by employee classification, including terms and rates of overtime for additional work if requested.

Licensure

- Provide documentation that architects and engineers that will stamp documents are licensed to practice in Montana.
- Has the Principal or Project Architect had their license revoked or suspended to practice architecture in any jurisdiction? If so, provide detailed information of the jurisdiction that suspended the license and the reason for the suspension.

Legal Proceedings

• Identify any on-going legal proceeding or pending legal proceeding (arbitration, complaint, or court action) filed by an Owner or contractor against your firm for any project in the past five years.

References

• Please provide a minimum of five references to contact (see Attachment B).

Point of Contact for Questions

All questions to request information regarding this RFP shall be submitted electronically to Dr. Sabre Moore, Museum Executive Director, at smoore@cartercountymuseum.org. The last day to submit questions is September 26, 2025. Responses to questions will be provided on cartercountymuseum.org by October 2, 2025 in the form of addendum.

Submittal Procedures

All Submittals will be made via email to Dr. Sabre Moore, Museum Executive Director, at smoore@cartercountymuseum.org. Only responses submitted electronically will be considered. An additional hard copy of the proposal mailed to Carter County Museum, PO Box 445, Ekalaka MT 59324 is welcome, though not required.

Selection Criteria

Proposals will be reviewed for completeness and qualifications. Final selection of a firm for contract negotiations will be made on the basis of the following criteria, with a maximum of 100 rating points as shown in the table below:

Proposal Selection Criteria	Maximum Points
The Architect's scope of work, methodology, work plan, and budget.	35
The Architect's general experience, qualifications, and ability to perform timely execution of the project work as evidenced by previous, similar projects.	25
The Architect's professional credentials in architecture, civil engineering, and cost estimating, including the qualifications, expertise, and experience of individuals assigned to the project.	15
The Architect's references.	10
The Architect's direct experience with Montana Department of Commerce, Montana State Heritage Preservation Office, County Government, and federally funded projects and reporting	10
The Architect's bonding/insurance capacity/history	5

The final contract for these Services shall be awarded only after review of the selected firm's fee proposal and any necessary negotiations with the selected firm to establish a fair and reasonable price within the budget for this project. CCM actively encourages submission of proposals from disadvantaged business enterprises and companies owned by Native Americans, minorities, women, immigrants, and veterans. CCM is an Equal Opportunity Employer and does not discriminate on the basis of race, color, religion, creed, sex, age, ancestry, national origin, disability, or veteran status in consideration of this award.

Terms & Conditions

The following terms and conditions apply to all proposals:

• CCM reserves the right to reject any and all proposals submitted; to select one or more responding parties; to void this RFP and the review process and/or terminate negotiations at any time; to select separate responding parties for various components of the scope of services; and to select a final party/parties from among the proposals received in response to this RFP. Additionally, any and all RFP project elements, requirements and schedules are subject to change and modification. CCM also reserves the unqualified right to modify, suspend, or terminate, at its sole discretion, any and all aspects of this RFP process, to obtain further information from any and all responding parties, and to waive any defects as to form or content of the RFP or any responses by any party.

- This RFP does not commit to CCM to award a contract, defray any costs incurred in the preparation of a response to this RFP, or contract for any services. All submitted responses to this RFP become the property of CCM as public records. All proposals may be subject to public review, on request, unless exempted as discussed elsewhere in this RFP.
- By accepting this RFP and/or submitting a proposal in response thereto, each responding party agrees for itself, its successors and assigns, to hold CCM and its agents, directors, consultants, attorneys, officers, and employees harmless from and against any and all claims and demands of whatever nature or type, which any such responding company, its representatives, agents, contractors, successors or assigns may have against any of them as a result of issuing this RFP, revising this RFP, conducting the selection process and subsequent negotiations, making a final recommendation, selecting a responding party/parties or negotiating or executing an agreement incorporating the commitments of the selected responding party.
- By submitting responses, each responding party acknowledges having read this RFP in its entirety and agrees to all terms and conditions set out in this RFP.
- Responses shall be open and valid for a period of ninety (90) days from the due date of this RFP.

Insurance Requirements

Architect shall procure and maintain, at its sole cost and expense, in a form and content satisfactory to CCM, during the entire term of this Agreement including any extension thereof, the following policies of insurance:

- Commercial General Liability Insurance. A policy of commercial general liability insurance using Insurance Services Office "Commercial General Liability" policy form CG 00 01, with an edition date prior to 2004, or the exact equivalent. Coverage for an additional insured shall not be limited to its vicarious liability. Defense costs must be paid in addition to limits. Limits shall be no less than \$2,000,000.00 per occurrence for all covered losses and no less than \$4,000,000.00 general aggregate.
- Workers' Compensation Insurance. A policy of workers' compensation insurance on a state approved policy form providing statutory benefits as required by law with employer's liability limits no less than \$1,000,000 per accident for all covered losses.
- In the event that the Architect is authorized to subcontract any portion of the work or services provided pursuant to this Agreement, the contract between the Architect and such subcontractor shall require the subcontractor to maintain the same policies of insurance that the Architect is required to maintain.

Proposal Organization and Format

Proposal should be submitted as a paper document or as a .pdf file. Proposers responding to this RFP must comply with the following format requirements:

- **Tab 1 COVER LETTER, RFP SIGNATURE PAGES:** Include cover letter, Attachment A RFP Signature and Authority Affidavit Form, any addenda signature pages. The Signature and Authority Affidavit submitted in response to this RFP must be signed by the person in the Proposer's organization who is responsible for the decision as to the prices being offered or by a person who has been authorized in writing to act as agent for the person responsible for the decision on prices and services. Failure to provide this forms/information with your bid submittal may disqualify your proposal.
- **Tab 2 LEAD FIRM COMPANY INFORMATION:** As indicated, provide company information, history of the firm and federal and state registration documentation of the proposer.
- **Tab 3 DESIGN TEAM QUALIFICATIONS:** Provide information for the entire design team along with the Team's approach to the project, a brief description of the scope of services, representative projects, and methods for schedule and budget control and ability to provide required reporting to EDA.
- **Tab 4 REFERENCES:** Include 5 references associated with similar projects (Attachment B)
- **Tab 5 PROPOSED FEES (Shortlisted Firms Only):** Short listed firms shall bring a fee proposal to the interview for the design services described in this RFP. In addition, identify the Architect of Record, and Engineers of Record for each design discipline along with confirmation that each listed design professional is licensed to practice in the State of Montana and has not had their license revoked or suspended in Montana or any other Jurisdiction within the United States of America. Provide proof of the required insurance.