

GALLATIN COUNTY
REQUEST FOR COMPETITIVE PROPOSALS
for
DEVELOPMENT of the GALLATIN COUNTY REST HOME PROPERTY

INTRODUCTION

TO ALL INTERESTED VENDORS: Gallatin County is seeking competitive proposals from “vendors” to provide services (per specifications on Exhibit A attached and incorporated herein.)

DELIVERY DEADLINE & INSTRUCTIONS

DELIVERED NO LATER THAN 4:00 PM, MOUNTAIN TIME, March 20, 2023, in a sealed box or envelope with company name shown clearly on the outside, addressed to:

COMPETITIVE SEALED PROPOSAL
Rest Home Property Development
Gallatin County Clerk and Recorder
311 West Main, Room 203
Bozeman, MT 59715.

CONTACT INFORMATION

Requests for additional information or clarification: Contact: Nick Borzak, 311 W. Main Street, Bozeman, MT 59715, nick.borzak@gallatin.mt.gov

AMENDMENTS TO REQUEST FOR PROPOSAL

Any interpretation or correction of this Request for Competitive Proposals “CSP” will be made by written addendum sent to all Vendors that have requested or been sent a proposal.

The last day for questions related to this Proposal is March 1, 2023.

PROPOSAL FORM & CONTENTS

Deliver one (1) signed original, plus four (4) copies and (1) thumb drive and submitted as follows:

Maximum (30) pages front & back not including this form.

<u>Document</u>	<u>Information</u>
1. Cover Letter:	Profile, name, address, location, phone number, email address, contact persons.
2. Binding Offer: (signed)	By signing this form it confirms that the person signing the proposal has the authority to bind the company.
3. Specifications:	Describe in detail work as per Exhibit A.
4. License:	Copy of License, Business Certificate.

SELECTION PROCESS

Gallatin County has adopted the Montana State Procurement Act, Title 18, Chapter 4, including Competitive Proposal Procedure of Montana Code Annotated (MCA) § 18-4-301 – 304.

1. **Evaluation.** A selection committee will evaluate all conforming proposals. Gallatin County expressly reserves the right, in its sole judgment, to accept or reject any or all proposals, with or without cause, and to waive any defects and to allow modifications and supplementation of proposals that are submitted within the deadline.

Selection Timeline

Advertise:	February 19 & 26, 2023
Question deadline:	March 1, 2023
Due:	March 20, 2023, 4:00pm MST
Opening:	March 21, 2023

2. **Rejection.** Gallatin County expressly reserves the right, in its sole judgment, to accept or reject any or all proposals, with or without cause, and to waive any defects and to allow modifications and supplementation of proposals that are submitted within the deadline.
3. **Review.** Vendors shall be sure to address the below Criteria in their submittal. The Selection Committee will review conforming proposals as follows:

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<u>Criteria</u>	Points
1. Approach to meeting county needs for housing and daycare	20
1a. Approach to meeting housing needs of public-service partners	10
1b. Approach to meeting overall community housing needs	5
2. Approach to meeting project goals, development and programming vision	25
3. Proposed ownership and financial structure	15
4. Experience with similar projects (neighborhood design and engagement, experience of identified project team)	25
5. Interview if scheduled	25

4. **Revisions.** Vendors submitting proposals will be accorded fair and equal treatment with respect to opportunity for discussion and revision of proposals, and such revisions may be permitted, after submissions and prior to award for the purpose of obtaining best and final proposals.
5. **Scoring & Elimination.** After scoring proposals based on the criteria herein the selection committee may eliminate one or more or all vendors from further review.
6. **Interviews & Vendor Site Visit.** After scoring & elimination the selection committee may in its discretion select one or more or all vendors to participate in interview(s), make oral presentation(s), provide supplemental information and documentation, or make site visit(s). The selection committee may use this process for further elimination. All arrangements and scheduling shall be coordinated by the selection committee or its agent.
7. **Confidential Negotiations.** Prior to making any award the selection committee may negotiate directly with the remaining vendor or vendors. In conducting discussions and negotiations, there may be no disclosure of any information derived from competing proposals. The selection committee shall comply with resident bidder preference of § 18-1-102, MCA.

BINDING OFFER

VENDOR'S PROPOSAL CONSTITUTES A VALID LEGAL OFFER FOR 180-DAYS. VENDOR'S PROPOSAL SHALL NOT BE WITHDRAWN WITHOUT THE CONSENT OF GALLATIN COUNTY. Negligence, errors, mistakes or omissions in preparing the proposal, information, documentation, costs, or calculations shall confer no right of withdrawal after the submission deadline. Vendor bears all costs of preparing the proposal and any subsequent presentation or participation in the selection process.

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MISTAKES ERRORS & OMISSIONS

Vendor shall disclose errors in costs, calculations or information “mistakes” in the proposal submitted as well as in any related contracts, agreements, estimates, change orders or other documents. In the event that County accepts any proposal, related contracts, agreements, estimates, change order or other documents containing mistakes the **vendor shall be obligated to correct mistakes that are adverse to the County and shall have no right to enforce such mistakes against the County, except mistakes that work in favor of the County shall be binding on the vendor.**

COUNTY RESERVATION OF RIGHTS

SUBMISSION OF A PROPOSAL CONFERS NO RIGHTS UPON ANY VENDOR AND SHALL NOT OBLIGATE GALLATIN COUNTY IN ANY MANNER WHATSOEVER. GALLATIN COUNTY RESERVES THE RIGHT TO MAKE NO AWARD AND TO SOLICIT ADDITIONAL PROPOSALS AT A LATER DATE.

This Request for Competitive Proposals may be canceled or any or all proposals may be rejected in whole or in part, as specified herein, when it is in the best interests of Gallatin County, and such reasons will be stated in the contract file. § 18-4-307, MCA.

NOTICE OF AWARD

In the event an award is granted, then the contract file shall contain the basis of the award that shall be to the responsible and responsive Vendor whose proposal best meets the evaluation criteria and the resident bidder preference of § 18-1-102, MCA.

REMEDIES & REMOVAL

Vendors are advised that the Montana State Procurement Act provides exclusive remedies for Vendors, bidders, contractors or aggrieved parties. § 18-4-242, MCA. Transfer and assignment of contracts without authority and collusion or secret agreements between vendors for the purpose of securing any advantage is strictly prohibited, and any person who violates such provisions may be held criminally liable for misdemeanor with civil penalties from \$500 to \$5,000. § 18-4-141, MCA. In addition to these remedies [and other recourse provided in this invitation and at law or equity] Vendors may be suspended or removed as provided in § 18-4-241, MCA.

AGREEMENT TO TERMS & CONDITIONS

THE UNDERSIGNED IS DULY AUTHORIZED TO BIND THE COMPANY NAMED BELOW AND
HEREBY AGREES TO ALL THE TERMS AND CONDITIONS IN THE FOREGOING REQUEST
FOR PROPOSALS.

DATED: _____

(company name)

(authorized signature above)

(Print name & title)

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EXHIBIT A

SCOPE OF WORK AND SPECIFICATIONS

Gallatin County is requesting proposals for development services for a property located north of and adjacent to the Gallatin County Rest Home. The site is the northern approximately 5-acres of Tract B of COS 2439 located at 1221 Durston Road in Bozeman, MT. The property is zoned R-4 and is within the City of Bozeman.

Project Background

In January 2022, Gallatin County released a Request for Competitive Proposals for Pre-Development Consulting for the Rest Home Property to explore the feasibility of providing workforce housing and a daycare for County Employees.

This work included goal setting, research for housing and childcare needs, research for ownership structure options, employee engagement (surveys and meetings), neighbor/public engagement and ideation including:

- 11/29/21 – Gallatin County Staff Housing Meeting
- Winter 2021 – Employee Childcare Survey
- Spring 2022 – Employee Housing Survey
- 3/4/22 – Gallatin County Commission Meeting: Goal Setting
- 4/29/22 – Gallatin County Employee Meeting: Goals/Research Sharing
- 5/23/22 – In Person Meeting with Neighbors and Interested Parties
- 5/25/22 – Virtual Meeting with Neighbors and Interested Parties
- 7/6/22 – Gallatin County Commission Meeting: Ideation
- 8/9/22 – Gallatin County Commission Meeting: Continued Ideation

An informal application was submitted on behalf of the County to the City of Bozeman in September 2022. The application included a narrative with specific questions related to future development of the subject property as well as a vicinity map, a potential transportation exhibit, aerial images, an existing conditions site map, and a conceptual civil and graphic site plan. This submittal was not intended to be the only design solution for the site but rather an option the City Development Review Committee could use to provide more detailed responses and comments as part of the Informal Application process.

On 12/9/22, the city provided written comments on the Informal Application. On 12/16/22, the City of Bozeman Community Development Department hosted a follow up meeting with the consulting team and the County to discuss the written comments.

All of the information related to engagement and the Informal Application is available on the project page of the [County's website](#).

Proposals must be feasible under and comply with the legal requirements for the sale or donation of government property, including MCA 7-8-2513, which requires an appraisal; the County's Asset Disposal and Lease and License Policy which requires public auction for a sale (or a policy change would be needed); donation of property under MCA 7-8-2522, which requires permanent affordability parameters; exchange of property under MCA 7-8-2522 which requires exchange for equivalent value; lease of County property under MCA 7-8-2231, which limits a lease term to 40 years; and MCA 7-8-2513 which requires leasing for appraised value (credits for improvements, etc may be allowed). In addition, any subsequent project delivery contracts, including design-build contracts, construction management contracts, and general contractor contracts will need to go through further procurement in compliance with the County's Procurement Policy and Title 18 of Montana Code Annotated.

Property Description and Location

The subject property is located north of the existing Gallatin County Rest Home at 1221 Durston Road, Bozeman MT 59715 (Geocode: 06079801201040000; Taxcode: RGG25966). The portion that will be developed is the northern approximately 5 acres although some adjustments may be necessary to the existing parking lot configuration of the Rest Home. The property is currently zoned R-4 (Residential High Density) and is designated as "Urban Neighborhood" in the 2020 Bozeman Community Plan. The following property constraints have been identified:

- The topography gently falls to the northwest corner of the property.
- An existing shallow sewer main cuts through the northern portion of the property as identified on the Existing Conditions Site Map.
- Additional right-of-way for a standard local street will be required for Juniper Street along the property's northern boundary.
- Right-of-way or an easement will be required for the planned extension of Oak Park Drive along the property's eastern boundary to the planned extension of Aspen Street. There are a variety of options available for the size and design of the street.
- There is an existing pedestrian easement to the west that connects to Matheson Way.
- The subject property falls within the Bozeman Solvent Site boundary.
- The subject property is in an area that is known to have seasonally high groundwater.
- Cash-in-lieu of water rights must be paid prior to site plan approval.
- The City of Bozeman Parks Department has identified this project as a good candidate for "improvements in lieu of onsite parkland dedication;" however additional park planning and engagement may be required (note: onsite open

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- space still required).
- A traffic impact study will be required as part of the site plan application.

County Needs for Housing and Daycare

The response should address how the following Gallatin County needs will be met:

- A minimum of 24 units reserved for County Employees (not including minimum units to be provided in dorm-style or lock-off rooms). These units should be provided in a mix of types and sizes and remain under County ownership or otherwise exclusively be available to the County via a long-term lease arrangement.
- Additionally, a minimum of 9 dorm-style or lock-off rooms or equivalent units; open to different types of configurations. These units should remain under County ownership or otherwise exclusively be available to the County via a long-term lease arrangement.
- Daycare center for a minimum of 50 children (may be combined in the same building as dorm-style/lock-off units). The daycare center is not envisioned to be operated by the County at this time, but is intended to remain under County ownership or otherwise exclusively be available to the County via a long-term lease arrangement for use by a licensed provider.

Public Sector Partner and Community Housing Needs

In addition to meeting the County's housing and daycare needs, the County envisions an ability to utilize the parcel to help meet the housing needs of public-service partners and/or the community at large. If this is a part of the proposed project, please outline the approach to engaging public-service partners, and how housing will be developed to meet public-service and/or community housing needs.

Project Goals, Development and Programming Vision

The response should include information about how/if the following goals and vision can be implemented. Project drawings are not required; a detailed narrative regarding the proposed approach is sufficient to meeting the requirements of this evaluation criteria.

- Vehicular, pedestrian and bicycle connectivity **must** contribute to both the existing and future neighborhood transportation network.
- High quality community and neighborhood engagement for neighborhood design, park planning, and overall site programming **must** be conducted.
- Preference for variety of unit and building types.
- Preference for a buffer for the existing neighborhood to the west.

- Preference for project to be generally designed to meet city development codes and plans; open to the incentives from the new [voluntary affordable housing ordinance](#) and the new ordinance for [planned development zones](#).
- Include an anticipated timeline/development schedule based on the expectations of the proposed vision.

Ownership and Financial Structure

The response should include information for the proposed ownership and financial structure as well as any partnerships.

The County prefers to retain ownership of the site, employee housing units, and daycare (with any associated housing units). Alternative ownership structures for the subject site may be considered; however, ownership of the existing Rest Home must remain with the County. Under alternative ownership arrangements, all County employee housing must exclusively be available to the County via a long-term lease arrangement.

The County will consider a variety of financial structure options and/or partnerships. These options range from paying a development services fee for completion of the neighborhood to long-term leasing and/or potential sale of a portion of the property. It is the County's intent that potential developers provide the County with approaches that meet the County's needs while contributing to greater public-sector partner and community housing needs in a creative, collaborative approach. The County intends for the land to be their only investment in the development; however, **if any additional funds** from local or state government are part of the proposed financing structure or for fees etc, please include the estimated costs and describe how those funds would be used to meet public sector partner and/or community needs.

Experience with Similar Projects

The following shall be included in the response:

- 1) Evidence of previous success developing neighborhoods and affordable housing units, as demonstrated through written and/or graphic summaries.
- 2) Evidence of previous project experience including land acquisition, engagement, entitlements, development agreements, construction, and operations management.
- 3) Evidence of sufficient staff and consultant resources to complete the proposed development in a timely manner. Please identify members of the project team and include their resumes.
- 4) References for example projects.