

Cottage #5

Request for Proposals

Boulder, MT

Goal

To obtain a full feasibility study on a building known as Cottage #5 in Boulder, Montana. This feasibility study would expand on existing efforts, including; a Preliminary Architectural Report (Fall, 2021), Cost Estimate for Clean-up Report prepared for EPA (December, 2018), and Boulder River Commons Master Plan (April, 2022). While both Cottage #5 and Griffin Hall sit on the same property tract and were included together on various documents, this feasibility study would strictly pertain to Cottage #5 only.

History

The Cottage #5 building is on the National Historic Register as being part of the Historic District formerly known as the Montana Deaf and Dumb Asylum. In 1895 the unfortunate “Asylum” name designation was originally required to secure funding from the State Legislature. In 1912, a large three-story building (later called Griffin Hall) was built in the center of a large field outside of Boulder. The School for the Deaf and Blind was primarily grouped on the north side of the Boulder River; while on the south side the grounds followed the national trend of a “Cottage Plan” institution which separated genders and groups of people into separate buildings. Construction of five cottages encircled Griffin Hall with Cottage #5 beginning constructed in 1923 and open for use in September of 1924 as a woman’s dormitory. In 1937 the students at the Deaf and Blind school permanently moved to Great Falls Montana, and the grounds changed names several more times to the Montana State Training School, Boulder River School, and in 1985 the Montana Developmental Center. The State of Montana turned over Griffin Hall and Cottage #5 and 6.58 acres to Jefferson County in March, 2000. The general area is now known as the “South Campus.” Cottage #5 is a two-story 10,782 square foot building that has been vacant for decades and is the last of the original five cottages still standing.

Miscellaneous Information or Improvements

Montana Department of Environmental Quality (DEQ) Brownfields Program has selected Cottage #5 to receive funding for hazardous material mitigation. DEQ will award the clean-up contract this spring and work will be completed in the summer/fall of 2023.

The South Campus is in discussions with the City of Boulder to be annexed into the city boundary. Water, sewer, and power infrastructure is nearby. The establishment of heating, ventilation, and air conditioning (HVAC) system will be a large component of this project. Historically, heating was provided by tunnels underground from a central steam plant that went out of service decades ago. Jefferson County is exploring Department of Energy’s (DOE) Energy Performance Contracting (EPC). EPC provides an alternative procurement method for design and construction services that reduce facility operating

costs through energy conservation improvements. EPC is an attractive financing model that uses cost savings from the project to finance the construction work, sometimes with no upfront cost. EPC offers a smart way to make energy improvements to public facilities even when there is no budget to fund the work.

A new ceramic tiled roof was installed by Jefferson Local Developmental Corp (JLDC) in 2011 to help preserve the condition of Cottage #5. However, rain gutters and downspouts will need to be designed and installed to draw water away from the foundation. The tile design was selected with assistance from Peter Brown from the State Historic Preservation Office (SHPO).

The interior of Cottage #5 has a unique set of ramps in the center of the building. These ramps were used to wheel patients back and forth from the second level but do not meet modern day American Disability Act (ADA) Standards. Both options of altering the pitch of one of the ramps or installing an elevator need to be explored.

Project Objectives

An experienced team will assess building needs and layout concepts for housing the Jefferson County Health Department (JCHD) on the lower level. The upper level will need layout concepts for commercial office space, ideally for other health and wellness providers and/or businesses. Upon award of contract, consultant must

Scope of Services

The consultant will be tasked with completing a financial feasibility study and coordinating with the other firms/partners on the following issues;

- 1) **Historic Tax Credit**– A chosen consultant will need to coordinate with Montana State Historic Preservation Office and Brian Wishneff & Associates on meeting standards for Federal and State Historic Preservation Tax Incentives program to secure Historic Tax Credits (“HTC”).
- 2) **Community Development Block Grant** – CDBG funding for Public Facilities has been identified as a potential source with specific requirements and outlines.
- 3) **Energy Service Provider**- Energy Service Provider (ESP) whose qualifications have been vetted by the State; are selected for each EPC contract. The ESP ensures a high standard of technical expertise and has sufficient financial resources to guarantee cost savings for project financing.
- 4) **Dark Sky Compliant**- Outdoor lighting and design should follow recommendations from International Dark Sky Association and Montana North Western Energy Dark Sky Friendly Street light program.

HISTORIC PRESERVATION CONSULTING SERVICES SCOPE OF WORK

Task	Description	Schedule
a.1	<p>Determination of Significance</p> <ul style="list-style-type: none"> a. Serve as the Design Team’s liaison to the State Historic Preservation Office (“SHPO”), National Park Service (“NPS”), and other historic preservation stakeholders. b. Conduct building evaluations in accordance with the National Register Criteria for Evaluation and other applicable standards and coordinate with SHPO and NPS to determine and document the eligibility of the Property for the National Register of Historic Places and associated HTC. c. Prepare and submit Certificate of Historic Preservation Significance Application – Part 1 (Evaluation of Significance) and similar materials to the SHPO and NPS and track and provide supplemental information as needed. Part 1 will need to be completed as soon as possible as Cottage #5 is not individually listed on the National Register. Part 1 is used by to evaluate significance within a registered district. 	
a.2	<p>Renovation Plan</p> <ul style="list-style-type: none"> a. Provide ongoing direction to the Design Team on acceptable and recommended standards for rehabilitation to ensure compliance with applicable Historic Preservation Standards. b. Represent Design Team; make presentations and prepare application materials needed for approvals by SHPO and NPS. c. Prepare and submit Certificate of Historic Preservation Significance Application – Part 2 (Description of Rehabilitation) to the SHPO and NPS. Track and provide supplemental information as needed. 	

TAX CREDIT ACCOUNTING AND FINANCIAL CONSULTING SERVICES

Task	Description	Schedule
a.1	<p>Accounting Services</p> <ul style="list-style-type: none"> a. HTC, NMTC and other financial projections. b. Cost certification for qualified rehabilitation expenses. c. Identification of key tax and business issues. 	
a.2	<p>Investor Services and Transaction Consulting</p> <ul style="list-style-type: none"> a. Debt and equity finance advice. b. Identification and evaluation of HTC and NMTC investors. c. Analysis of investor investment metrics such as Internal Rate of Return (“IRR”) and Return on Investment (“ROI”). Advice on timing and need for related financial materials such as appraisals and market studies. 	

Proposed Timeline

March 6th, 2023	RFP advertised for 45 days.
April 5 th , 2023	Walk-Through of Cottage # 5 onsite 11: 00 am to 12:00 pm. Venture Way, Boulder-Montana
April 17 th , 2023	Electronic packages due by 4:00 pm.
May 2023	Evaluations of packets and selection of finalists
May 2023	Presentations and interviews with finalists
June 2023	Selection of consultant
June 2023	Contract executed/ Part 1 Evaluation of Significance with NPS
July 2023	Draft Final deliverables due
July-Aug 2023	Final Deliverables due

Invoices and Payments

The selected consultants must be comfortable with reporting and payment constraints of public funding and comply with all sub-recipient requirements regarding supporting documentation, compliance with laws, and payment. Selected consultants must show proof of professional liability insurance and not be on any public entity debarment list.

Please include hourly rates, fees, and conditions for consultation needs AFTER receiving Final Plan.

Desired Consultant Qualifications and Submission Requirements

The successful candidate will be able to demonstrate competency and experience in developing Preliminary Architectural Reports and Preliminary Engineering Reports, especially for historic buildings. They will possess experience working with community groups, elected officials, and other collaborative partners.

Submission Instructions

Firms interested in being considered for this project must submit one (1) hard copy of their proposal and statement of qualifications by mail to Jefferson County-Clerk and Recorder, Box H, Boulder, MT 59632, or by sending one PDF copy electronically to gkunz@jeffersoncounty-mt.gov (please cc project officer Leah Lewis leah.lewis@jldcmt.com) Only submittals under 20 pages (or 10 double-sided sheets, if printed) will be accepted, in addition to an introductory letter. Responses should include:

1. The firm's legal name, address, and telephone number;
2. The principal(s) of the firm and their experience and qualifications;
3. The experience and qualifications of the staff to be assigned to the project, with an emphasis on experience with historic building and meeting Historic Tax Credit eligibility;
4. A description of the firm's prior experience, with links to at least two examples of past projects and appropriate references;
5. A description of the firm's current work activities and how these would be coordinated with the project; and
6. The proposed work plan and schedule for activities to be performed.

All submissions must be postmarked no later than April 17th 2023 or received at the above address by 4 P.M. As noted above, electronic submissions are welcomed. The response packets should be clearly marked "Cottage #5 Feasibility Plan".

Scoring and Selection Process

Respondents will be evaluated by a panel according to the following factors:

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| 1. The qualifications of the professional personnel to be assigned to the project | 30% |
| 2. The consultant's capability to meet time and project budget requirements | 15% |
| 3. Presentations and projected workloads | 15% |
| 4. Related experience on similar projects | 40% |

The selection of finalists will be based on an evaluation of the written responses. Interviews will be held with the top-ranked firms. The award will be made to the most qualified offeror whose proposal is deemed most advantageous and cost beneficial for Jefferson County. Unsuccessful offerors will be notified as soon as possible. Final Deliverables shall be received no later than September 1st, 2023.

Award

Conversations between Jefferson County and consultants may occur for purposes of clarification regarding the selection process only. Consultants shall be bound by the information submitted in their Proposals and subsequent negotiations.

Those submitting Proposals may be required to make a presentation to Jefferson County Commissioners, Jefferson County Health Department, Wishneff & Associates and JLDC as part of the selection process. The presentation team should include the Project Manager and any other key personnel necessary to address administrative and technical issues.

This Request for Proposal is being made in accordance with state and federal statutes which govern the procurement of professional services by local government. Accordingly, Jefferson County reserves the right to negotiate a contract based upon fair and reasonable compensation for the scope of work and services proposed. The County further reserves the right to reject any and all responses it deems incomplete, unqualified, unsatisfactory, or inappropriate.