



# QUALIFICATIONS BASED SELECTION (QBS) Architecture/Engineering Services 8-9-23

**A. Introduction** Jefferson County Library District (JCLD) is requesting proposals from interested architectural firms to provide services for the Jefferson County Library Addition and Renovation located in Madras, OR. Responding firms should be aware that JCLD intends to utilize current funds, apply for grants and/or pursue a capital improvement bond to fund this project.

JCLD has concluded that they are in need of a capital improvements project. The current capital improvements contemplated, include but are not limited to, the following:

## GENERAL

The JCLD is a center for sharing resources to educate, enrich, and connect our diverse community. The library is a single branch serving a district population of 20,548. The County seat, Madras, was one of the fastest-growing cities of its size in Oregon in 2022. JCLD is an independent library district funded with a permanent levy of \$0.4349 per \$1000.

The current JCLD structure in downtown Madras was built in 1990. The library structure is 5,946 square feet and is located on 0.34 acres. Additional lots owned by the library surrounding the structure combine to make a 0.64-acre lot, plus 2 lots across the street that are a combined 0.5-acre lot. The library building is on the edge of a 100-year floodplain that is being reevaluated by Jefferson County Commissioners, the City of Madras, and FEMA.

The library renovation and expansion will reimagine the current structure of the existing 5,946 square feet building to accommodate the community's expanding needs. The additional approximately 12,000 square feet is to facilitate space for separate adult and youth areas, a children's activity area, a full-service technology lab, makerspace, a special heritage collection, study rooms, a flexible meeting and event room, a media room, office spaces, and green space. Some additional room for collection expansion is necessary, although not the focus of the expansion needs. Additional space to accommodate potential partnerships should be considered during the design process. High level master site planning of future phases of campus projects will be part of this solicitation with timing of those phases dependent on identification of additional partners and/or funding. Hired firm for this project may have the opportunity to roll future phases of the project into their open contract.

## HISTORY:

In 2021, the Library took its first steps to expand and renovate the JCLD with the demolition of the Rodriguez Annex. It was a bittersweet moment to see the cinderblocks come tumbling down. The community shared many memories of that building, but we are all excited to begin the next stage and build a large addition to our existing building. Another major focus of the year was the I AM A STORY project. The Library partnered with other local organizations and began a drive to collect the stories of local residents to preserve and educate the multiple cultures of the County.

A new Bookmobile, a whisper room, and expansion into our outlying buildings were the main focus of 2022. The Library was about to purchase and outfit a Bookmobile to improve its outreach to the whole County through a generous grant. With the bookmobile came a redesign of the logo and a shift in workloads for all the staff. The purchase of sound-booth

to use in the collecting of I AM A STORY stories was also a grant purchase. It was also a year that saw a lot of moving around for staff as new offices and storage rooms were built in a number of the buildings that the Library owned. The Genealogy Center was sold and all the items moved into the library towards the end of the year.

The Library's current mission and vision are:

Mission: The Library's mission is to strengthen our community through opportunities to educate, engage, and explore.

Vision: The Library is a trusted community resource and an essential platform for learning, creativity, and innovation by providing a conduit between information and knowledge.

For further information concerning the history of the Jefferson County Library District, check out *Pages of the Past: the History of the Jefferson County Library* by Kathie Olson at the Library.

Representatives of the Library Board and Library Administration have been engaged in programming discussions over the last several years. A series of meetings have been held over those years and the process is ongoing. Jefferson County Library District selection committee intends to select a firm that provides the best fit with the District's needs.

**C. RFQ Dates and Deadlines** JCLD has established the following dates and deadlines for this RFQ.

QBS issue date	August 9, 2023
Deadline for proposer questions	August 30, 2023
Response to proposer questions	September 6, 2023
Proposals due	September 13, 2023
Shortlisted firms identified *	September 20, 2023
Proposer interview - If Required	September 27, 2023
Notice of intent and negotiations	October 4, 2023
Board approval of selection	October 18, 2023
Beginning of services	October 19, 2023

\* Items at or below this line are subject to changes in dates.

At this time the JCLD intends on utilizing the CM/GC method of alternative contracting. The selected CM/GC firm will be an active member of the Project team throughout the DD & CD design process.

**D. Site Visits** No formal pre-proposal meeting has been scheduled.

### **E. RFQ Terms**

1. JCLD is issuing this QBS solicitation for the purpose of obtaining proposals for the provision of architectural and engineering services. JCLD expects to enter into a single contract, using the form of professional services contract and statement of work included in this QBS as **Attachment A**. However, JCLD does not guarantee that it will award any contract pursuant to this QBS solicitation.

2. At JCLD's discretion, any representation made by a proposer in response to this QBS solicitation, whether verbal or written, will be incorporated into any contract between JCLD and the proposer.

3. This QBS solicitation provides instructions for the preparation of a proposal that will address all QBS procurement requirements. This QBS solicitation is not an offer to contract. Only the execution of a written contract will obligate JCLD, in accordance with the terms contained in the contract.

4. JCLD will screen all proposals to ensure compliance with QBS solicitation specifications. Those proposals that do not meet minimum requirements will be classified as "nonresponsive." JCLD will disqualify all nonresponsive proposals from further evaluation. Responsive proposals will be evaluated on the basis of the criteria listed in section G of this QBS solicitation.

5. JCLD will not pay any costs a proposer incurs in preparing and submitting its proposal or in negotiating and signing a contract, all of which will be the sole responsibility of the proposer. Any due diligence conducted by a proposer is at the proposer's expense. All proposals become the property of JCLD upon delivery to JCLD.

6. JCLD reserves the right to amend this QBS solicitation in any manner prior to award of a contract. JCLD will notify all prospective proposers if JCLD amends the QBS solicitation.

7. JCLD reserves the right to excuse any proposer from any QBS solicitation requirement if JCLD deems it to be in JCLD's interest to do so.

8. JCLD reserves the right to cancel the QBS solicitation without liability to JCLD any time prior to executing contract if JCLD determines, in its sole discretion, it's in JCLD's interest to do so.

9. JCLD reserves the right to share the QBS solicitation and any proposals JCLD receives with any third party of JCLD's choosing, in order to secure expert opinion.

10. JCLD reserves the right to accept or reject any proposal even if all requirements have been met.

11. JCLD is subject to Oregon's public records laws. Subject to statutory exemptions from disclosure, which may or may not apply to all or a portion of a proposal, once the QBS solicitation process has been completed proposals will be subject to disclosure if JCLD receives a request to do so. The JCLD considers proposals submitted in response to this QBS solicitation to be submitted in confidence only until JCLD's evaluation is complete and the Board has acted on Notice of Intent to Award, and agrees not to disclose proposals until the Board has completed its evaluation of all proposals, publicly announced the notice of intent to award and the Board has acted on Notice of Intent to Award. If the proposer believes any part of its proposal constitutes material that is exempt from disclosure, the proposer must clearly identify this material when submitting the proposal, and the statutory basis for the exemption. Proposers may not identify the entirety of a proposal as exempt from disclosure.

## **F. Proposal Requirements**

Each proposer's submission in response to this QBS solicitation must:

1. Include one original (marked as such), 6 copies and one PDF copy on a USB flash drive;
2. Include the completed and executed Proposal form (Section 4 of this QBS solicitation) as the first page of the original submission and each copy;
3. Be submitted in a sealed envelope that is plainly marked "Proposal to Provide A/E Services – Jefferson County Library District: Addition and Renovation" and bears the proposer's name, address, telephone number, and email address; and
4. Be delivered to the following addressee **not later than 3:00 PM, September 13th 2023:**

**Gabrielle Beebe, Technical Operations Manager, Jefferson County Library District,  
241 SE 7th Street, Madras, OR 97741**

5. Additional solicitation information:

**a. Questions**

JCLD Questions pertaining to this QBS solicitation shall be presented in writing to:

Ricardo Becerril – Compass Project Solutions  
Jefferson County Library District – Owner's Representative  
Email: [ricardo@compasspsinc.com](mailto:ricardo@compasspsinc.com)

Questions must be received in electronic format not later than 2:00 PM, August 2<sup>nd</sup> 2023. Questions will be compiled and collectively addressed in writing prior to the deadline for receipt of proposals.

**b. Changes to QBS solicitation**

The JCLD reserves the right to make changes to the QBS solicitation. Changes will be made by written addendum which will be issued to all prospective proposers.

Prospective proposers may request or suggest any change to the QBS solicitation by submitting a written request. The request shall specify the provision of the QBS solicitation in question and contain an explanation for the requested change. The request must be submitted per the timeline above in section C of this RFQ.

The evaluation team will evaluate all requests submitted but will not be obligated to accept the requested change.

**c. Amend or Withdraw Proposal**

A proposer may amend or withdraw its proposal any time prior to the time and date established for submission of proposals.

**d. Public Disclosure of Proposals**

Any information provided to the Library District pursuant to this RFQ is subject to public disclosure pursuant to Oregon's public records laws (ORS 192.410 to 192.505).

The general requirement for public disclosure is subject to a number of exemptions. Each page containing information deemed by the proposer as necessary to remain exempt from public disclosure after proposals have been evaluated (e.g., pages containing trade secret, economic development information, etc.) should be plainly marked. Marked pages should be placed in a group separate from the remainder of the proposal.

The fact that a proposer marks and segregates certain information as exempt from disclosure does not mean that the information is necessarily exempt. The Library District will make an independent determination regarding exemptions applicable to information that has been properly marked and segregated. Information that has not been properly marked and segregated may be disclosed in response to a public records request. When exempt information is mixed with nonexempt information, the nonexempt information must be disclosed. The Library District will redact pages that include both exempt and nonexempt information to allow disclosure of the nonexempt information.

Unless expressly provided otherwise in this QBS solicitation or in a separate communication, the Library District does not agree to withhold from public disclosure any information submitted in confidence by a proposer unless the information is otherwise exempt under Oregon law. The Library District considers proposals submitted in response to this QBS solicitation to be submitted in confidence only until Library District's evaluation is complete and the Board has acted on Notice of Intent to Award, and agrees not to disclose proposals until the Library District has completed its evaluation of all proposals, publicly announced the notice of intent to award and the Board has acted on Notice of Intent to Award.

**6. Proposals must include the following information:**

- a.** the proposer's complete name, mailing address, physical address, e-mail address, voice telephone, and fax numbers (see section 7 below);
- b.** a description of the ownership structure of the proposer, giving specific details with regard to any parent or affiliates;
- c.** the names, titles, and qualifications of the specific individuals (key persons) proposer intends to assign to the work, together with the roles each will play, their current workloads, and their qualifications to do the work;
- d.** a list of sub-consultants proposed to be used on the Project (see section 12 below);
- e.** a thorough description of the proposer's experience utilizing collaborative contracting methods such as CMGC and team oriented management processes;
- f.** a description of other similar work performed within the past five years by the key persons;

- g. a description of other similar work performed within the past five years by the proposing firm;
  - h. a complete list of sub-consultants being proposed as part of the A/E team including the following at minimum:
    - \* Civil
    - \* Landscape
    - \* Structural
    - \* Mechanical
    - \* Plumbing
    - \* Electrical
    - \* Low Voltage
    - \* Energy Consultant (project will be enrolled with Energy Trust of Oregon)
  - i. references whom JCLD can contact to discuss the proposer's qualifications (see **Attachment C**);
7. If submitting a proposal with another firm, the proposal must provide the information requested regarding the experience of each firm and also provide the experience of both firms in working in association with other architectural firms. The proposer must explain if either firm will act as sub-consultant or whether both firms will operate as a joint venture or partnership. If the proposers will conduct business as a joint venture or partnership the proposal must provide the information requested regarding the experience of the partnership or joint venture in addition to that of each member firm. If the proposers are selected for an interview, they will be required to provide a copy of the partnership or joint venture agreement relating to the Project. Each partner or joint venture must sign the submittal and the contract if selected for award.
  8. Proposals must address all of the requirements of this QBS solicitation or, if the proposer cannot satisfy a particular requirement, the proposal must clearly identify any requirements that cannot be satisfied and explain why the requirement cannot be satisfied.
  9. Proposers are encouraged to add content in the area titled "**Innovative Ideas, Cost Reduction Strategies, Market Volatility Appendix Information**" where the proposer feels it can offer value to JCLD.
  10. A proposer may submit more than one proposal. However, if a subsequently submitted proposal is intended to replace an earlier proposal, the proposer must clearly indicate this intention when submitting the subsequent proposal. In the absence of such an indication, JCLD may elect to accept any single proposal submitted by a proposer, or reject all proposals submitted by the proposer.
  11. If the proposer has been certified by Oregon as a Disadvantaged Business Enterprise, Minority Business, Women Business, or Emerging Small Business, the proposer is encouraged to call this to JCLD's attention, and provide the certification number.
  12. The proposer must identify the sub-consultant by specialty, and provide the following information:
    - o Firm name, address, phone number, website;
    - o contact person information including email address;

- A list of the firm’s personnel by discipline that will be available to provide the capacity and capability to perform the required services for the Project
- A list of the firm’s relevant project experience limited to no more than five similar projects in size and complexity.

**13.** Each proposal must be signed by the proposer (if the proposer is an individual) or by an authorized representative of the proposer (if the proposer is a business entity), and must include a copy of a signed original of **Attachment B**, in which the proposer certifies that it meets all minimum requirements of section B of this QBS solicitation, the proposer has not colluded with any other proposer in the preparation of its proposal, and the proposer agrees to be bound by the terms and pricing of its proposal, including all attachments.

## **G. Selection Criteria**

- 1.** JCLD will evaluate proposals based on the following criteria:
  - a. Evaluation of technical proposal (Scored);
  - b. Innovative Ideas, Cost Reduction Strategies, Market Volatility Design (Scored)
  - b. References (Scored);
  - c. Interviews – If Required (Scored).
- 2.** Proposal elements that are subject to scoring will be awarded points as follows:
  - a. **Evaluation of Technical Proposal (Scored):** The evaluation committee will score all proposals as follows based on **200 points total. (125 points for Technical Proposal, 50 points for Innovative Ideas Section and 25 points for References.**
    - (i). Overall general and specific qualifications of the firm, background of firm (15pts).
    - (ii). Proposed design team members/firms for this project. Provide org chart and resumes for firms/team members (10pts).
    - (iii). Skills, experience and successes of the proposed project team (15pts).
    - (iv). Similar projects completed by the Principal, Architect or Proposed Project Manager, and the proposed project Engineering Firms (15pts).
    - (v). Experience of the firm in designing similar facilities. Identify similarities in your response. (example size/type/use/etc.) Also provide case study examples where budget funds were limited and how you added value in bringing the project in at or below the owner’s budget. (15pts).
    - (vi). Firm’s approach and understanding of Project and local construction market/climate. (40pts).
    - (vii). Overall approach to schedule management. Provide a proposed design schedule for the contemplated project. (15pts).

Additional items as may be determined by the evaluation panel.

- b. **Innovative Ideas, Cost Reduction Strategies, Market Volatility Appendix Information** – JCLD is interested in obtaining feedback from responding architectural firms related to potential construction types for this facility, any strategies that your firm can offer to help reduce project costs and any successful tools that your firm will bring to the table to aid in reducing market risk and market volatility. Please include information about challenges your firm may have experienced in this area and also any successes such as reduced costs/fees that the JCLD could anticipate. If your firm has any specific strategies that you believe could result in an expedited design schedule please provide that information. **(Scored)** (50 pts.)
- c. References - The evaluation committee will conduct reference checks including establishing contact with reference information provided by proposer as **Attachment C** of this proposal response. **(Scored)** (25 pts.)
- d. **Interviews – If required (Scored):** (max. 100 points)

3. The evaluation committee may request additional clarification from a proposer for any portion of a proposal. If a proposal is unclear, JCLD may ask the proposer to provide clarification. Proposer may not submit new information or documentation, however, and a proposer may not use a clarification to rehabilitate a non-responsive proposal. Proposers must be available during the evaluation period to respond to requests for additional clarification. Proposers shall submit written signed clarification(s) within 24 hours, Monday through Friday, after receiving JCLD's request. A proposer's failure to provide clarification may result in a lower score for the proposal.

4. JCLD reserves the right to request references in addition to those provided by the proposer, to investigate any references whether or not furnished by the proposer, and to investigate the past performance of any proposer. JCLD's investigation of proposer qualifications may include inquiry into the proposer's successful performance of similar services, compliance with specifications and contractual obligations, completion or delivery of services on schedule, proposer's lawful payment of suppliers, subcontractors, and workers, and other relevant matters.

5. The proposer(s) with the highest ranking proposal(s) will be invited to interviews. JCLD expects to conduct interviews per schedule noted in Section C, with one or more proposer prior to making a final selection. JCLD anticipates awarding contracts per schedule noted in Section C. However, JCLD is not required to interview proposers or to award any contract pursuant to this QBS solicitation.

6. JCLD's evaluation process and its decision on which proposals, if any, to accept, is not subject to review or challenge.

7. JCLD may postpone the award or execution of the contract after the announcement of the apparent successful proposer in order to complete JCLD's investigation.

## **H. Minority, Women and Emerging Small Business ("MWESB") Participation**

- 1. As noted in Oregon Governor John Kitzhaber's Executive Order 12-03: "Minority-owned and women-owned businesses continue to be a dynamic and fast-growing sector of the Oregon economy. Oregon is committed to creating an environment that supports the ingenuity and industriousness of Oregon's Minority Business Enterprise [MBE] and



Women Business Enterprise [WBE]. Emerging Small Business [ESB] firms are also an important sector of the state's economy."

2. Oregon MWESB-certified firms, as defined in Oregon Revised Statutes (ORS) 200.055, have an equal opportunity to participate in the performance of contracts financed in whole or in part with state funds. By submitting its proposal, the proposer certifies that it will take reasonable steps to ensure that MWESB-certified firms are provided an equal opportunity to compete for and participate in the performance of any subcontracts resulting from this procurement. Proposer further certifies and agrees that it has not and will not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation or national origin, and it has not and will not discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is a minority-owned, woman-owned, or emerging small business enterprise certified under ORS 200.055.
3. If there may be opportunities for subcontractors to work on the Project, JCLD expects the proposer to take reasonable steps to ensure that MWESB-certified firms are provided an equal opportunity to compete for and participate in the performance of any contracts or subcontracts resulting from this procurement.

#### **I. RFQ Attachments**

1. **Attachment A** to this QBS solicitation is the form of contract that will be used for any contract issued pursuant to this QBS solicitation. The contract includes the statement of work, insurance coverage requirements, and other exhibits associated with the Attachment.
2. **Attachment B** to this QBS solicitation is a statement that must be signed by the proposer and submitted with the proposal, certifying to the accuracy of all statements made in the proposal and certifying that the proposer meets all minimum qualifications stated in section B of this QBS solicitation and is prepared to enter into a contract on the terms contained in all attachments.
3. **Attachment C** to this QBS solicitation is a form to be used by proposer for listing references.

"A complete proposal will include the following materials:

- ✓ a narrative proposal responding to all requirements listed in section F.6;
- ✓ a copy of a signed and dated **Attachment B**, filled in and submitted by proposer with the proposal;
- ✓ a completed **Attachment C** (references), filled in and submitted by proposer with the proposal.

*(End of QBS solicitation – Attachments follow.)*

**Attachment A  
Form of Contract (with Exhibits)**

(See Attached PDF titled  
JCLD's AE Contract Draft)

## Attachment B Proposer Certifications

***NOTE TO PROPOSER: Each proposal must include a copy of a signed original of this attachment that has been signed by an authorized representative of proposer. Proposals that do not include a scanned signed copy of this attachment will be rejected as nonresponsive.***

Proposer represents that each of the following statements is accurate at the time the proposer submits its proposal. Proposer warrants that each of the following statements will remain accurate for a period of 120 days following submission of proposer's proposal and, if proposer's proposal is accepted, each statement will remain accurate throughout the term of any contract between proposer and JCLD (Jefferson County Library District) for Jefferson County Library Addition and Renovation architectural and engineering services.

1. The key persons named in proposer's proposal are qualified to perform the work described in this QBS solicitation and in the proposal, and proposer will assign these key persons to perform the work if JCLD awards a contract to proposer for these services.

2. Proposer has not colluded or consulted with any other proposer or potential proposer in the preparation and submission of this proposal.

3. Proposer agrees to be bound by the terms and pricing of its proposal, including all attachments to it.

4. The person signing this certification is authorized by proposer to act on behalf of and to make the representations in this certification on behalf of the proposer.

5. Proposer does not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation or national origin, nor has proposer or will proposer discriminate against a subcontractor in awarding a subcontract because the subcontractor is a minority, women or emerging small business enterprise certified under ORS 200.055.

6. Proposer has read and understands all instructions, specifications, and terms and conditions contained in the QBS solicitation and any addenda to it, and JCLD is not liable for any claims or subject to any defenses asserted by proposer based upon, resulting from, or related to, proposer's failure to comprehend all requirements of the QBS solicitation.

7. If JCLD awards a contract to proposer for Jefferson County Library District Addition & Renovation architectural and engineering services, proposer will diligently perform the contract according to its terms.

8. Each of the foregoing representations is accurate and is incorporated into any contract between JCLD and proposer for the delivery of Jefferson County Library District Addition & Renovation architectural and engineering services.

Proposer Name: \_\_\_\_\_

By: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

**Attachment C**  
**References – Jefferson County Library District Addition and Renovation Project**

**Proposer Name:** \_\_\_\_\_

Proposer must provide three references that can rate proposer’s performance on similar capital projects in the last ten years and proposer’s ability to satisfy the requirements set forth in QBS solicitation section F.5, Proposal Requirements. References must include client name, title and contact information, describe each project briefly, and indicate whether the project was funded publicly or privately.

JCLD may attempt to contact references given or seek other references not offered by proposer.

**(Note: Proposer may supply the required information in a different format, as long as all required information is provided.)**

**Reference 1**

Client Name: \_\_\_\_\_  
City, State: \_\_\_\_\_  
Contact Name: \_\_\_\_\_  
Contact Title: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
Email: \_\_\_\_\_  
Project Description: \_\_\_\_\_  
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\_\_\_\_\_  
Type: Public \_\_\_\_\_ Private \_\_\_\_\_ CM/GC \_\_\_\_\_ Hard Bid \_\_\_\_\_

**Reference 2**

Client Name: \_\_\_\_\_  
City, State: \_\_\_\_\_  
Contact Name: \_\_\_\_\_  
Contact Title: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
Email: \_\_\_\_\_  
Project Description: \_\_\_\_\_  
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Type: public \_\_\_\_\_ private \_\_\_\_\_ CM/GC \_\_\_\_\_ Hard Bid \_\_\_\_\_

**Reference 3**

Client Name: \_\_\_\_\_  
City, State: \_\_\_\_\_  
Contact Name: \_\_\_\_\_  
Contact Title: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
Email: \_\_\_\_\_  
Project Description: \_\_\_\_\_  
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Funding: public \_\_\_\_\_ private \_\_\_\_\_ CM/GC \_\_\_\_\_ Hard Bid \_\_\_\_\_

**Reference 4**

Client Name: \_\_\_\_\_  
City, State: \_\_\_\_\_  
Contact Name: \_\_\_\_\_  
Contact Title: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
Email: \_\_\_\_\_  
Project Description: \_\_\_\_\_  
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Funding: public \_\_\_\_\_ private \_\_\_\_\_ CM/GC \_\_\_\_\_ Hard Bid \_\_\_\_\_

**Reference 5**

Client Name: \_\_\_\_\_  
City, State: \_\_\_\_\_  
Contact Name: \_\_\_\_\_  
Contact Title: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
Email: \_\_\_\_\_  
Project Description: \_\_\_\_\_  
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Funding: public \_\_\_\_\_ private \_\_\_\_\_ CM/GC \_\_\_\_\_ Hard Bid \_\_\_\_\_