

Consistory Shrine Temple

Request for Qualifications

Helena, MT

Summary

The Consistory Shrine Temple (formerly the Ming Opera House and Helena Traction and Power building) are underutilized spaces in the heart of Downtown Helena. The strategic planning and re-use of the building would greatly assist in revitalizing the downtown district within Helena. This February, the CSTA board has entered into an Option to Purchase agreement with the Helena Symphony. This study will address the renovation and re-use of the facility for the Helena Symphony needs. Additionally, this feasibility study would expand on existing efforts, including a previously completed PAR looking at broad reuse of the Consistory Shrine Temple buildings, and planning efforts from the City of Helena, including the Cruse Ave redevelopment study.

This Request for Qualifications for planning consultant services has been developed following all the requirements of Montana state law. Funding for this project has been made available via an award through the Montana Department of Environmental Quality (DEQ) Brownfields program.

History

The Helena Consistory Shrine Temple buildings are the Old Ming Theater and the Light and Traction House. Today the buildings have been renovated into office, meeting, and storage space. The theater, kitchen, and several historic areas and features have been preserved. The two buildings combined are 28,000 square feet. The north building, the Helena Light & Traction Substation, is 5,250 sf and currently used for office space, meeting rooms, and storage. The Ming Theater is 23,200 sf. The theater and many historic features have been preserved. A survey conducted in 2011 by Mosaic Architecture, Planning, and Design revealed a deep sentiment and appreciation for preserving the historic grandeur of these two old Helena iconic buildings.

The Helena Light and Traction Substation was Helena's main utility starting in 1902 and continued operations until 1951. The Ming Theater opened for its first performance in September 1880 and was acquired by the Helena Scottish Rite Bodies and Algeria Shrine Temple in 1912. Both are Masonic organizations. In 1942 the old Masonic Temple on Broadway was sold, and all Masonic organizations moved into the Consistory Shrine Temple. When Mosaic conducted their survey, these two buildings' annual maintenance and operations costs ranged from \$62,000 to \$64,000 ten years ago. Those costs have increased and are cost-prohibitive for the Consistory Shrine Temple Board of Directors to continue operations.

In 2021/2022, the CSTA board received planning funds from the Big Sky Trust Fund (BSTF) and the City of Helena to conduct a PAR looking at existing conditions and providing recommendations for future revitalization and re-use. An environmental site assessment of both buildings was also completed at this time. Upon completion of the initial PAR, the CSTA board discussed next steps and was approached by

the Helena Symphony as a potential Buyer. At the time of this RFQ, the Helena Symphony and the CSTA have signed an Option to Purchase agreement as of February 2023.

The Helena Symphony intends to use this project's findings and the feasibility study deliverables to guide the next steps, including the construction and renovation of both buildings for use by the Symphony for mixed-use space.

Project Objectives

An experienced team will assess building needs and layout concepts for rejuvenating the theater for the purpose of use by the Helena Symphony as both rehearsal and smaller-scale performance space. In addition, the final study would also include specifications for mixed-use office space for Symphony staff and housing space for musicians. Upon completion of this PER and Feasibility Study, the Symphony expects to be able to move forward directly into the next phase, including permitting, construction, and fundraising.

Scope of Services

The consultant will be tasked with completing one in-depth PER and Feasibility Study, looking at both the Ming Opera House and the Helena Traction and Power Building for their individual and combined use by the Helena Symphony.

MBAC is issuing this RFQ to seek consultants to provide the following project services.

- 1) **Historic Preservation Consulting** – guidance through the Federal Historic Preservation Tax Incentives program to secure Historic Tax Credits (“HTC”) and associated historic design review approvals and landmarks designations.
- 2.a) **Historic Tax Credit Accounting and Financial Consulting** – Historic Tax Credit (“HTC”) projection, accounting, and financial consulting services to assist with the creation of an HTC financing package.
- 2.b) **New Markets Tax Credit Accounting and Financial Consulting** – New Markets Tax Credit (“NMTC”) projection, accounting, and financial consulting services to assist with the creation of an NMTC financing package.

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. 	
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 standards and eligibility for listing on the National Register historic tax credits. b. Represent Design Team and 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 and track and provide supplemental information as needed. 	
a.3	<p>Certify Completion of Rehabilitation Project</p> <ul style="list-style-type: none"> a. Following completion of the Renovation Plan, prepare and submit Certificate of Historic Preservation Significance Application – Part 3 (Request for Certification of Completed Work) and track and provide supplemental information as needed. b. Prepare and submit a National Register nomination to the SHPO and NPS. c. Advise on other conditions or instruments that may be needed to secure or enjoy the benefits of National Register status including easements or special assessments for historic properties. 	

TAX CREDIT ACCOUNTING AND FINANCIAL CONSULTING SERVICES SCOPE OF WORK

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. Transaction and entity structuring, including combining HTC and NMTC with other tax credits and financing sources. b. Debt and equity finance advice. c. Identification and evaluation of HTC and NMTC investors. d. Evaluation of building tenants and lease terms and effect on deal structure and feasibility. e. Analysis of investor investment metrics such as Internal Rate of Return (“IRR”) and Return on Investment (“ROI”). f. Advice on timing and need for related financial materials such as appraisals and market studies. 	

Proposed Timeline

- March 2023 RFQ Issued
- April 2023 Submission20 Packets Due
- April 2023 Evaluations of packets and selection of finalists
- April 2023 Presentations and interviews with finalists
- April 2023 Selection of consultant
- April 2023 Contract executed
- April 2023 Draft Final deliverables due
- May 2023 Final Deliverables due

Budget

A selection committee will consider all consultant applications that adhere to the budget defined by the award through the Montana Department of Environmental Quality (DEQ) Brownfields program, which has provided funding in the amount of \$80,000 to be used for this project.

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.

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, stakeholders, City staff and boards, and elected officials.

Firms interested in being considered for this project must submit three (3) hard copies of their qualifications and statements of qualifications by mail to Katherine Anderson, 225 Cruse Ave, Ste D Helena, MT 59601, or by sending one PDF copy electronically to kanderson@mbac.biz (please CC additional project liaisons, Jason Seyler JSeyler@mt.gov and Ronald Baldwin r2jbaldwin@gmail.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;
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.

Submission Instructions

Questions and responses should be directed to Katherine Anderson, 225 Cruse Ave, Ste D Helena, MT 59601 or by sending one PDF copy electronically to kanderson@mbac.biz (please CC additional project liaisons, Jason Seyler JSeyler@mt.gov and Ron Baldwin r2jbaldwin@gmail.com). All submissions must be postmarked no later than April 7th, 2023 or received at the above address by 5 P.M. As noted above; electronic submissions are welcomed.

Scoring and Selection Process

Respondents will be evaluated 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. Present 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 submission is deemed most advantageous, all factors considered. Unsuccessful offerors will be notified as soon as possible.

Award

Montana Business Assistance Connection, Inc. (MBAC) reserves the right to accept or reject any submissions received from this RFQ or negotiate separately with any submitter after any responses are

open; conversations between MBAC and consultants may occur for purposes of clarification regarding the selection process only. Consultants shall be bound by the information in their submissions and subsequent negotiations.

Those providing qualification submissions may be required to present to MBAC and the review committee 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.

MBAC reserves the right to award the contract to a consultant it deems to offer the best overall submission. MBAC is not bound to accept a submission based on the lowest price and reserves the right to accept or reject any submissions received from this RFQ. MBAC has the sole discretion and reserves the right to cancel this RFQ, reject any and all submissions, waive any and all irregularities, or re-advertise with identical or revised specifications if it is deemed to be in the best interest of MBAC.