

**STOCKBRIDGE-MUNSEE COMMUNITY
REQUEST FOR PROPOSALS**

**ELDERLY CENTER
PROJECT MANAGEMENT SERVICES
BOWLER, WISCONSIN**

**(SECOND POSTING)
September 8, 2021**

I. INTRODUCTION

The Stockbridge-Munsee Community (“Owner” or “Tribe”), a federally recognized Indian tribe, is seeking proposals for a firm and/or individuals to act as a Project Manager/Owners Rep and provide project management services in relation to the expansion of their assisted living facility, the Ella Besaw Center (hereby referred to as "Project"). The Project is being initiated to expand the current licensed class CS small CBRF (8-bed facility) located at N8697 Moh He Con Nuck Road, Bowler WI. The services discussed under this Request for Proposals (“RFP”) will be provided on the Stockbridge-Munsee Indian Reservation, located in Shawano County, Wisconsin.

II. SCHEDULE FOR PROPOSALS

Sealed proposals for the services requested in the RFP **will be received until October 8, 2021, at 4:00 PM**, Central Daylight Time. Proposals shall be marked “Project Manager” on the outside of the envelope. Proposals shall be delivered to the Stockbridge-Munsee Tribal Secretary, N8476 Moh He Con Nuck Road, P.O. Box 70, Bowler, WI 54416.

III. PROJECT

A. Description of Project. The Stockbridge-Munsee Community intends to construct an addition onto the Ella Besaw Community-Based Residential Facility (CBRF) to increase the current facility capacity and to increase the number of residents it can house from five to eight individuals to nine to twenty individuals. The CBRF will provide a place for nine to twenty unrelated people to live in a community setting. Services provided include room and board, supervision, support services, and may include up to three hours of nursing care per week. The CBRF will serve residents who are ambulatory, semi-ambulatory, and one or more of whom are not physically or mentally capable of responding to a fire alarm by exiting the CBRF without help or verbal or physical prompting. Upon completion of the expansion, the intention is to complete renovations of the existing facility.

The site is located at N8697 Moh He Con Nuck Road, Bowler, WI. The facility is a CBRF that currently can care for five to eight residents who are ambulatory and who are mentally and physically capable of responding to a fire alarm by exiting the CBRF without any help or verbal or physical prompting. The project is to design and construct a new addition onto the current Ella Besaw CBRF structure that will expand it from a small class CBRF to a large Class CBRF. The Project must be compliant with Wisconsin Department of Health Services (DHS) Chapter 83 guidelines. The Project will include two additional rooms designated for hospice care.

The Tribe intends to have the Project exceed federal accessibility standards and be built to energy-efficiency standards for sustainable living in green communities.

The Project must be scheduled and coordinated in a way that minimizes disruptions of the current Ella Besaw Center residents during the construction process and allows for continued operations

B. Project Schedule. The Owner's goal is to complete design work in winter 2021-spring 2022 so that construction work may be completed by fall 2023.

IV. SCOPE OF SERVICES

A. Owner's Objectives.

1. The successful bidder will be the Tribe's Project Manager and provide project management services described in this RFP for the Project. The Tribe's Aging & Disability Services Area Manager will be the primary point of contact for the Project Manager.
2. The successful bidder will serve as contact for communication between the Tribe and its design and construction contractor(s) in order to best coordinate services.
3. The successful bidder shall be responsible to ensure compliance with the Project schedule and budget.
4. The successful bidder will work with all parties to minimize disruption to residents in the surrounding area throughout the construction process and to allow for continued operations of the Ella Besaw Center during construction.
5. The successful bidder shall be responsible to coordinate and manage the construction process including, but not limited to, the management of the procurement process and project budget, design services, site coordination, administration of construction contracts, change order management, monitoring of day-to-day activities, inspections, and quality assurance.
6. The successful bidder shall be responsible to prepare and maintain an Owner's decision log, which identifies issues or selections that require decision by Owner, including status of each item, decision on item and date of decision, in order to facilitate timely decision-making.
7. The Owner intends to use an owner direct purchasing program whereby it can directly purchase construction materials for contractors in order to take advantage of Owner's tax-exempt status. The successful bidder will be required to help manage that purchasing system.
8. The successful bidder is responsible for all meeting costs and to conduct meeting in the most economic method.

B. Planning and Design Phase Responsibilities. The Project Manager will have responsibilities during the planning and design phases that include, but are not limited to, the following:

1. Review Project goals, objectives and constraints with Owner and provide recommendations on how they can be best achieved. This includes discussion of whether design/build or design-bid-build is appropriate for the Project, site designation and expansion of current facility or build new.
 2. If Owner determines a design-bid-build process is appropriate, oversee the procurement process for selection of an architect.
 - i. Work with the Tribe's Legal Department in relation to the preparation of the architecture contract.
 - ii. Work with architect to complete design for facility that meets the Tribe's expectations and needs, within constraints of site.
 - iii. Write RFP and follow process to obtain architect.
 3. If Owner determines a design/build process is appropriate, work with Owner to develop design program expectations to incorporate as part of procurement process for selection of a design/builder including drafting RFP for Owner's approval.
 4. Ensure the building plans for the Project obtain all required approvals by the State of Wisconsin for a CBRF.
 5. Represent the Tribe to ensure that Project serves the interests of the Tribe and permits the Tribe to operate the CBRF for years effectively and efficiently to come.
- C. Pre-Construction Responsibilities. Project Manager will have pre-construction phase responsibilities that include, but are not limited to, the following:
1. Prepare and update a Project budget as necessary throughout construction. Evaluate and advise Owner about opportunities for savings.
 2. Develop Project Schedule.
 3. Monitor the construction schedule for the Project.
 4. Oversee the procurement process for selection of a design/build contractor or general contractor, as appropriate, to complete construction work, including receiving and reviewing bid specifications and bidding process. Work with the Tribe's Legal Department in relation to the preparation of the contract.
 5. Identify additional contracts required to complete construction work and assist Tribe with procurement process for such services.
 6. Monitor the contractor's construction trade procurement process.
 7. Coordinate the submittal of all required insurance and related information required under construction contracts.
 8. Coordinate obtaining and distributing of documents for geotechnical and environmental reports as appropriate. Review and coordinate addressing problems identified in such reports.

9. Coordinate obtaining all required permits, including a tribal building permit. If the Owner is responsible for obtaining such permits directly, prepare permit applications for Owner's use.
 10. Examine the permitting and inspection processes applicable to the Project, advise the Owner in respect thereto as construction proceeds, and assist the Owner in complying with any obligations of the Owner in connection with the permitting and inspection processes.
- D. Construction Responsibilities. Project Manager will have construction phase responsibilities that include, but are not limited to, the following:
1. Monitor and inspect all work in progress daily to ensure the quality of the work and compliance with the construction documents. Securing an office space in the construction trailer for themselves.
 2. Manage and oversee Owner's contracts for the Project, including change orders, pay requests and lien releases.
 3. Provide prompt written notice of deficiencies to responsible party and Owner. Make recommendations for corrective actions and ensure that correction actions are implemented.
 4. Coordinate contractors' use of the site, particularly regarding limiting disruptions to surrounding residents.
 5. Review and process drawings, samples, and submittals.
 6. Attend all construction meetings for coordinated by the building contractor. Attend other construction meetings as appropriate and necessary.
 7. Maintain cost accounting system to track Project costs.
 8. Receive and review applications for payment, including all supporting documentation, and forward same to Owner with recommendation for action, including amount due, adjustments for work not completed, and any other bases for withholding payment.
 9. Notify Owner and responsible contractors of any claims asserted by against Project and assist with resolution.
 10. Assist Owner with coordinating and managing the direct purchase of construction materials by Owner to take advantage of Owner's tax-exempt status.
 11. Review and process contractors' requests for changes in the work or claims in relation to the Project, provide recommendations to Owner and act on any direction provided by Owner.
 12. Provide guidance and direction as needed regarding installation of owner-supplied materials, furniture, and equipment.
 13. Obtain services of independent inspector to conduct building inspections as necessary.

14. Facilitate discussions between Owner and contractors to resolve disputes and make decisions.
 15. Maintain construction records, including contracts, specifications, drawings, submittals, schedules, meeting minutes, directives, change orders, etc. Ensure that daily field reports on job-site conditions are maintained, including weather, construction activities, and any special occurrences. Maintain photographic records of construction activities as built.
 16. Provide regular reports to the Owner, including information on schedule, budget, quality, safety, and general Project information. Written reports should be submitted once a month, or as otherwise determined necessary, and oral reports should be as needed.
 17. Monitor contractors' safety programs to help ensure jobsite safety. Receive and review any reports of safety violations and reportable accidents or injuries.
 18. Receive and review any reports of hazardous material and provide recommendation to Owner regarding such material.
- E. Closeout and Post-Construction Responsibilities. Project Manager will have closeout and post-construction phase responsibilities that include, but are not limited to, the following:
1. Coordinate construction close-out activities, including punch-list preparation, completion of deficiencies, submittal of close-out documents, and recommendations on the release of retainage amounts.
 2. Ensure Project site is clean, cleared of debris and equipment, and that there are no liens or encumbrances arising from the Project.
 3. Receive and review all documentation required from contractors to achieve final payment and final completion, including as-built plans, warranties, and operation and maintenance manuals.
 4. Coordinate any required commissioning.
 5. Review as-built drawings for accuracy and notify Owner of any errors in such drawings or errors that otherwise become known.
 6. Make final inspection and provide certification that, to the best of their professional knowledge, the building conforms to the approved plans, specifications, and shop drawings, ensuring coordination with Architect/Engineering firm.
 7. Submit all Project documentation to Owner in organized and useable form both electronic and paper formatted.
 8. Participate and assist Owner in any dispute resolution proceedings regarding the Project.
 9. Conduct follow-up inspections of the Project at 6-months and 12-months after construction is completed.

E. Conditions. The following conditions must be adhered to by Project Manager when performing services under this Project.

1. Adherence to Tribal, state, and local laws covering the work performed and compliance with such requirements is required. Additionally, the construction shall meet requirements under Chapter DHS 83, Wis. Admin. Code.
2. The bidder must supply all materials and personnel required to perform work.
3. Ensure that every precaution must be taken to protect the safety of the tribal community, as well as the integrity of the Tribe's operations.
4. General liability, worker's compensation, and vehicle insurance must be provided at bidder's own cost, naming the Stockbridge-Munsee Community as an additional insured on liability coverage, minimum amount of \$1,000,000 coverage. Certificates must be on file prior to the start of any work and policies provided on request. Must present to the Tribe's Mohican Nation Insurance office.
5. Owner must approve any subcontractors and subconsultants. Insurance must be provided for any subcontractors and subconsultants while they are on a Project site.
6. The Project is being constructed on tribal trust land so that the bidder has no lien rights.
7. If successful, the bidder will be prohibited from taking on any other role or responsibility with respect to the Project covered by this proposal.

V. PROPOSAL REQUIREMENTS

A. Proposals shall include the following elements:

1. Proposals shall identify the fee for these services. Such fee may be based on a sum per each phase of work or may be on an hourly basis with a not-to-exceed cap per phase.
2. Proposals shall specify proposed reimbursable costs in detail, including a total estimated cost for reimbursable expenses.
3. Proposals shall identify the staffing plan for the Project and key personnel, including contact person and on-site personnel.
4. Proposals shall include a brief description of the bidder's approach toward and working method for providing the project management services identified in this RFP.
5. Proposals shall identify the bidder's qualifications for this work regarding the following: credentials, qualifications, and years of experience in project manager capacity, key members of the project team, including and sub consultants, the bidder would assign to this project.
6. Proposals shall include the bidder's understanding and approach to the project regarding the following: knowledge of the project, working with tribal nations, design concerns, environmental issues, on site stormwater management, CBRF knowledge, utility coordination, and public agency concerns.

7. Proposals shall include relevant, recently completed, or substantially completed projects which include a reference for each.
 8. Proposals shall identify the nature of any potential conflict of interest the bidder might have in providing services for the Tribe and any current litigation in which the bidder is a named party.
- B. Proposals that do not include all the requested information shall be deemed non-responsive and subject to rejection.
- C. Any questions concerning this RFP shall be forwarded, in writing, by e-mail, fax or mail, as follows:
- Stockbridge-Munsee Tribal Council Secretary
N8476 Moh He Con Nuck Road
P.O. Box 70
Bowler, WI 54416
Telephone: 715-793-4387 Fax: 715-793-1307
- D. Any responses issued will be provided to all proposers who have submitted a notice of intent to propose.

VI. ADDITIONAL INFORMATION

- A. The successful bidder will be required to enter a written contract with the Tribe. An example of this contract may be provided upon request. The Owner does not intend to grant a limited waiver of its sovereign immunity as part of any contract to provide services under this RFP.
- B. This RFP does not commit the Tribe to award a contract, pay any costs associated with the preparation and presentation of a proposal, or procure or contract for services of any kind whatsoever.
- C. The Tribe reserves the right to revise the evaluation and selection process without notice and in its sole discretion, to accept or reject any or all bids, to negotiate with any or all bidders or to cancel the RFP in whole or in part.
- D. The Tribe reserves the right to request additional information from any or all bidders.
- E. Bidders may be required to participate in negotiations and to submit any price, technical or other revisions to its proposal that may result from such negotiations.
- F. All materials submitted in response to this RFP will become the sole property of the Tribe and will not be returned.
- G. Should the Tribe be unsuccessful in negotiating a contract with the selected bidder within an acceptable time frame, the Tribe reserves the right to begin contract negotiations with another respondent to the RFP.

- H. The Tribe may waive informalities or irregularities in a proposal.
- I. The successful bidder will be fully responsible for errors and omissions of any subcontractors and subconsultants used for the work.
- J. By submitting a bid, bidders warrant that they have not and will not engage in conduct that violates federal law or tribal law prohibiting conflicts of interest, gratuities or gifts between contractors and tribal officers and employees involved in the award or administration of contracts.
- K. The successful bidder must agree to provide the Tribe with audit access on request during the term of the contract and for seven years thereafter.
- L. This Project is for work on a Community Based Residential Facility (CBRF) in an area that is in proximity to elders. The Tribe reserves the right to deny access to any individuals who it deems may be a danger to the tribal community.

***** **END OF DOCUMENT** *****