

# Request For Proposals

## ENGINEERING DESIGN AND CONSTRUCTION DOCUMENTS

for the

## WHITEFISH POINT HUMAN USE / NATURAL RESOURCE MANAGEMENT PLAN

## AND AMENDMENT

Date of Issuance:	<b>January 9, 2012</b>
Mandatory Pre-Bid Walk-Through	<b>January 23, 2012</b>
Pre-Proposal Written Questions Due:	<b>January 30, 2012</b>
Response to Pre-Proposal Questions:	<b>February 13, 2012</b>
Proposal Due Date and Time:	<b>February 20, 2012</b>
Selection to be Made:	<b>February 24, 2012</b>

Issuing Agency: The Eastern Upper Peninsula  
Regional Planning and Development Commission (EUPRPDC)

Owner: The Great Lakes Shipwreck Historical Society

Contact Person: Jeff Hagan, Executive Director  
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## I. GENERAL INFORMATION

### 1. Purpose

This Request for Proposals (RFP) provides interested consultants (also referred to as the Vendor or Primary Vendor) with specific information to prepare and submit a proposal to produce a complete set of Engineering Design Drawings and Construction Documents for selected elements of the 2002 *Human Use / Natural Resource Management Plan for Whitefish Point, Michigan and Amendment*. This plan is scheduled for Amendment by the Whitefish Point Joint Committee on January 20, 2012. A copy of the current 2002 Plan may be downloaded at <http://www.eup-planning.org/media/1325781746.pdf>

The project site is located at Whitefish Point, Michigan on 43 acres of property formerly owned by various agencies of the U.S. Government, most recently the U.S. Coast guard. Whitefish Point is the northern terminus of Whitefish Point Road, a county primary connecting to state highway M-123, in Whitefish Township, Chippewa County. Affected local governments include: Whitefish Township, Chippewa County, and the Chippewa County Road Commission. Whitefish Point rests directly on Lake Superior at the entrance to Whitefish Bay; all vessel traffic must enter and leave the lake at this critical (and often congested) navigational turning point.

### 2. Definitions

#### Stakeholders:

Great Lakes Shipwreck Historical Society (GLSHS)  
Michigan Audubon Society (MAS)  
U.S. Fish & Wildlife Service (USFWS)

#### Selection Team:

Jim Spurr, Great Lakes Shipwreck Historical Society  
Sean Ley, Great Lakes Shipwreck Historical Society  
Jeff Hagan, Eastern Upper Peninsula Regional  
Planning and Development Commission  
(EUPRPDC)  
Dave Rusch, Michigan Department of Transportation (MDOT)  
Vince Bevins, Michigan Department of Transportation (MDOT)  
Mark Vaniman, U.S. Fish and Wildlife Service (USFWS)  
Joe Kaplan, Michigan Audubon Society (MAS)

#### Correspondence Distribution List -- Selection Team Plus the following:

Pat Casey, MDOT  
Kristen Matson, Michigan Department of Resources (DNR)  
Rob Laitinen, Chippewa County Road Commission (CCRC)  
Michael Sauer, Michigan Audubon Society (MAS)

3. Type of Contract

The contract for the project will be a firm-fixed-price contract, to begin on or after **March 15, 2012** and be completed on or before **September 15, 2012**. If a contract is entered into as a result of this RFP, the contract will include all necessary information/work items to produce the Engineering Design Plan with cost estimates to implement or construct items designed. The contract will be funded by the Federal Highway Administration National Scenic ByWays Program, through a contractual arrangement with the Michigan Department of Transportation and the Great Lakes Shipwreck Historical Society.

4. Issuing Office

This RFP is issued by the Eastern Upper Peninsula Planning and Development (EUPRPD) Commission in concert with the owner, The Great Lakes Shipwreck Historical Society (GLSHS). Inquiries concerning the administration of the contract for the project should be directed to Jeff Hagan, Executive Director, 906-635-1581. All other inquiries can be submitted to (*email is preferred*):

Eastern Upper Peninsula Planning and Development Commission  
P.O. Box 520  
Sault Sainte Marie, MI 49783  
Attn: Jeff Hagan, Executive Director  
(906) 635-1581  
Toll free: 855-885-3690  
jshagan@eup-planning.org

Verbal inquiries or requests for information shall not be made of EUPRPDC staff. Any attempt on the part of a vendor or any of its employees, agents or representatives to contact EUPRPDC or MDOT staff with respect to this RFP, other than as described above, may lead to disqualification.

5. Submission of Proposals

Send one original (unbound) and 10 copies (bound or unbound) of the technical proposal to the issuing office by [30 days after issuance of this RFP]. The pages must be numbered consecutively, e.g., 1, 2, 3, etc. No other distribution of the proposals will be made by the Vendor or his agent.

Send one original and one copy (both unbound) of the price proposal, **separate from the technical proposal, in a sealed envelope clearly marked, "Price Proposal" with the vendor's name on the front of the envelope**. Continue the consecutive page numbering from the last page of the technical proposal, e.g., 3, 4, 5. Instructions and format for the price proposal are attached.

Proposals must be signed by an authorized agent to bind the Vendor to his provisions. The proposal must remain valid for a period of at least 120 days from the due date of submission.

6. Addenda to the RFP

If it becomes necessary to revise any part of the RFP, addenda will be provided by the issuing office to all vendors who receive the RFP.

7. Mandatory Pre-Proposal Walk-Through

All prospective vendors who wish to bid on this project must attend a mandatory pre-proposal walk-through and meeting to be held on **January 23, 2012** at the subject work site: The Great Lakes Shipwreck Museum Campus, Whitefish Point Light Station, Whitefish Point, Michigan. Inquiries concerning the mandatory pre-bid meeting, and its exact location and commencement time, should be directed to Jeff Hagan, Executive Director, EUPRPDC, at 906-635-1581.

8. Pre-Proposal Questions

All questions related to this RFP shall be submitted in writing only, no later than **January 30, 2012**. EUPRPDC shall provide a copy of all the questions and answers to all Vendors who received an RFP.

9. Oral Presentations

Vendors who submit a proposal may be requested to make an oral presentation of their proposal. This presentation will provide an opportunity for the Vendor to clarify his/her proposal.

10. Prequalification

This project shall require the selected Vendor to be pre-qualified in each of the following MDOT service classifications:

*Design Services Group:* Building and Structure Design  
Landscape Architecture and Habitat Restoration  
Right-of-Way Surveys  
Road Design Surveys  
Roads, Streets, and Parking Lot Design

11. Cost Liability

EUPRPDC assumes no responsibility or liability for costs incurred by any prospective Vendor prior to the signing of a contract by all parties.

12. News Releases

Any news release(s) pertaining to this RFP or the services, study, data or project to which it relates will not be made without prior written EUPRPDC approval, and then only in accordance with the explicit written instructions from EUPRPDC.

13. Disclosure

All information in a Vendor's proposal and any contract resulting from this RFP is subject to disclosure under the provisions of the "Freedom of Information Act," 1976 Public Act No. 442, as amended, MCL 15.231, et seq.

14. Acceptance of Proposal Content

The contents of the proposal by the successful Vendor shall become contractual obligations if a contract ensues. Failure of the successful Vendor to accept these obligations may result in cancellation of the award.

15. Independent Price Determination

A proposal will not be considered for award if the price in the proposal was not arrived at independently without collusion, consultation, communication, or agreement as to any matter relating to such prices with any other bidder or with any other competitor.

The Vendor must include a certified statement in the proposal certifying that the price was arrived at without any conflict of interest as described in the paragraph above. Should a conflict of interest be detected any time during the contract, the contract shall be null and void and the Vendor shall assume all costs of this project until such time as a new Vendor is selected.

## II. BACKGROUND

The first formal settlement at Whitefish Point was installation of a Light Station by the U.S. Congress in 1849, operated by the U.S. Lighthouse Service, authorized at the order of President James K. Polk. The original stone tower proved too feeble for severe winds off Lake Superior; it was replaced in 1861 by an "Iron-Pile" skeletal lighthouse during the Lincoln Administration. This same 1861 lighthouse functions in its original purpose today as the oldest operating light on Lake Superior, a primary beacon on the 2010 U.S. Coast Guard Light List.

Activity at Whitefish Point took place among various federal maritime agencies until the end of World War II. The U.S. Coast Guard closed its Lifeboat Rescue Station at the site in 1951, followed by removal of all personnel in 1970; the lighthouse was then automated and operated remotely from Sault Ste. Marie. The storm on November 10, 1975 not only knocked out electrical power to the lighthouse; it also sank the 729-foot *Edmund Fitzgerald* just 15 miles to the northwest, with her entire crew of 29 men.

The 1970's saw deterioration of the site due to effects of abandonment, weather and vandalism. Officials of Whitefish Township were successful in placing the site on the National Register of

Historic Places in 1973, but there was no money available to maintain nor preserve the now historic Light Station. In early 1980, township officials approached the new Great Lakes Shipwreck Historical Society, a group of teachers, researchers, and underwater divers operating from Whitefish Point Harbor of Refuge, for possible assistance in preserving the site and developing a maritime museum.

The Shipwreck Society obtained a License from the U.S. Coast Guard in 1983 to conduct museum operations at the site, opening the first exhibits in 1985. The Great Lakes Shipwreck Museum became an immediate success, and a new museum building was dedicated in 1987. Today, the Shipwreck Museum attracts over 61,000 paying visitors to Whitefish Point each season.

The Omnibus Act of 1996 legislatively transferred ownership of Whitefish Point's property to its present three stakeholders: 8.27 acres to the Shipwreck Society and 2 acres to the Michigan Audubon Society via federal land patents; and 33 acres to the U.S. Fish and Wildlife Service.

Since 2002, the approved Human Use/Natural Resource Management Plan (the Plan) has successfully guided visitor and construction/renovation activity on the site. Per the Plan, the U.S. Fish & Wildlife Service retains all responsibility for assuring that any activity is consistent with conservation values spelled out in the Plan. Prospective Vendors will be provided with a complete copy of the Plan. The Primary Vendor will be required to consult with the Habitat Maintenance and Restoration Subcommittee of the Whitefish Point Joint Committee regarding habitat restoration and enhancement, specifically the species of plants and placement. This plan is scheduled for Amendment by the Whitefish Point Joint Committee on January 20, 2012.

As Whitefish Point is a National Historic Site, the Michigan State Historic Preservation Office (SHPO) must approve all work to be done at the site, particularly if any work involves federal funding, invoking Section 106 of the National Historic Preservation Act of 1966. **Prospective Vendors MUST be entities that have been pre-approved by the Michigan SHPO to conduct work relating to historic properties.**

### III. SCOPE OF WORK

#### A. Work Statement

This Engineering Design project is to provide a complete set of design, cost estimates and construction documents for selected elements that are identified in this RFP as approved in the *2002 Whitefish Point Human Use and Natural Resource Management Plan and Amendment*.

**IMPORTANT:** A COPY OF THE PLAN MAY BE DOWNLOADED AT:

<http://www.eup-planning.org/media/1325781746.pdf>

Specifically, these include but are not limited to:

- Preliminary Design Plans
- Final Design Plans
- Cost Estimates
- Construction Specifications

Construction Plans and Related Documents  
Permits  
Site Survey Map and Elevations

Prospective Vendors who intend to respond to this Request for Proposal are requested to **download** a copy of the *2002 Human Use / Natural Resource Management for Whitefish Point and Amendment* at <http://www.eup-planning.org/media/1325781746.pdf>

Prospective Vendors are urged to carefully read that entire document, paying particular attention to the information found on pages 30–59 called *Preferred Future Plan* and the information found on pages 60-65 called *Plan Implementation*.

The following are elements of the Human Use Plan for which design documents and cost estimates are to be created; please see “Deliverables” on page 10 of this RFP for more specific information. All design work, including parking, must follow the specifications contained within the *2002 Human Use / Natural Resource Management Plan for Whitefish Point and Amendment*.

Second Assistant Keepers Quarters/Orientation Center  
Visitor Orientation Plaza  
Human Use Trails and Controls  
Habitat Restoration, Enhancement, as mitigated in the Plan  
Trailhead and Motorized/Non-Motorized Parking – North  
    Spaces for 20 cars, paved  
Trailhead and Motorized/Non-Motorized Parking – South  
    Spaces for 30 cars, 20 RVs, and 4 buses, paved  
Right-of-Way Parking: 63 spaces, see 2002 Plan page 50.  
    Vendor is required to work with the Chippewa County  
    Road Commission for input and approval.

Note: Two specific items reflected in the original Plan have been removed, 1) museum wings; and 2) service drive parking, whereas, the owner Great Lakes Shipwreck Historical Society agrees to eliminate from the 2002 Plan provisions calling for the service drive and parking adjacent to the GLSHS west property line, north of Whitefish Point Road, where drive and parking does not now exist. (These items are the subjects of the proposed January 20 amendment action.)

B. Sub-consulting Vendor(s) for design of interior, 2<sup>nd</sup> Assistant Keepers Quarters

Detail pertaining to this structure is explained on page 57 of the Plan. While the Primary Vendor will design the frame and exterior of this building based on existing historical information, its interior will be used by all three stakeholders for greeting, orientation, and interpretation. Therefore, a sub-consultant, skilled in museum exhibit design, may be engaged by the Primary Vendor for the express purpose of interior design and interpretive exhibit design within the 2<sup>nd</sup> Assistant Keepers Quarters.

Selection of this sub-contracting consultant(s) shall be approved by the owner. Prospective Vendors must specifically indicate their intention of how they plan to approach this work item in the proposal submitted to the EUPRPDC.

Approval of the selected Interior Design Consultant(s) must be made prior to engagement by 1) the owner Great Lakes Shipwreck Historical Society 2) EUPRPDC 3) MDOT 4) Michigan Audubon Society and 5) the U.S. Fish & Wildlife Service. Any proposed consultant must present proof of successful design work on similar interpretive or cultural projects.

The primary Vendor shall include all proposed costs for the Interior Design Consultant(s) in his bid. The contract for this project will contain a provision requiring prior written approval to sublet any of these services should the primary Vendor choose this course of action. All sub-consultants must be identified and are subject to approval as stated here. Qualifications and background information is required as specified in the "Key Personnel" section of this RFP.

C. Sub-consulting Vendor(s) for habitat restoration and enhancement

The Primary Vendor will be required to work directly with the U.S. Fish & Wildlife Service and Michigan Audubon Society while developing that part of the Engineering Design Plan that relates to habitat restoration and enhancement on the site. The U.S. Fish & Wildlife Service must assure that all proposed work is consistent with conservation values on the site. This work item will require the Primary Vendor to engage a sub-consultant that can demonstrate proven experience in habitat restoration and enhancement for environmental areas similar to Whitefish Point; and preferably a sub-consultant who can demonstrate knowledge of wetland delineation skills and Michigan rare plant species. This specialized consultant shall be referred to as "The Habitat Restoration and Enhancement Consultant."

The Primary Vendor and the Habitat Restoration and Enhancement Consultant shall be required to follow recommendations from the "Habitat Maintenance and Restoration Subcommittee" of the Whitefish Point Joint Committee as described in the *Human Use / Natural Resource Management Plan and Amendment* on pages 60-61.

Approval of the The Habitat Restoration and Enhancement Consultant must be made by 1) the U.S. Fish & Wildlife Services 2) the Michigan Audubon Society 3) the owner Great Lakes Shipwreck Historical Society and 4) the EUPRPDC.

The Primary Vendor shall include all proposed costs for The Habitat Restoration and Enhancement Consultant in his bid. The contract for this project will contain a provision requiring prior written approval to sublet any of these services should the primary Vendor choose this course of action. All sub-consultants must be identified and are subject to approval as stated here. Qualifications and background information is required as specified in the "Key Personnel" section of this RFP.

D. Survey Work; sub-consultant for survey work

The Primary Vendor shall supply a survey of the existing and proposed site including a plan of the survey. The survey plan will be used as the base plan for the proposed plan sheets and plan development. The base map will include existing pavement, streets, roads, parking lots, sidewalks, trails, designated parking and non-motorized areas, existing structures, utilities, tree line, terrain features and any other significant features, including wetlands and the location of rare plant species.

The Primary Vendor shall supply a State survey of the existing unpaved DNR parking lot and State surveys of all State land that borders BLM cadastral survey areas.

The base plans will show existing property boundaries and ownership for all properties within the proposed project area including Whitefish Point Road ROW, DNR, GLSHS, USFWS, MAS and any other adjoining property ownership within the project limits.

The Primary Vendor will require that elevation and drainage survey work be undertaken at the project site to produce the Engineering Plan, for the design of trailhead access and parking areas, and elevations for the design of new structures as outlined in the *Human Use / Natural Resource Management Plan and Amendment* including the Second Assistant Keepers Quarters and Visitor Orientation Plaza. All trailhead access and parking areas should consider the use of a green, environmentally friendly design approach with environmentally friendly materials.

Selection of any survey consultant shall be at the discretion of the primary Vendor. The primary Vendor may choose to function itself as the survey consultant, or may choose to sublet this work item to a different entity. Prospective Vendors must specifically indicate their intention of how they plan to approach this work item in the proposal submitted to the EUPRPDC.

The survey consultant shall be a registered land surveyor in the State of Michigan, and shall sign and seal survey reports.

The primary Vendor shall include all proposed costs for survey consultant work in his bid. The contract for this project will contain a provision requiring prior written approval to sublet any of these services should the primary Vendor choose this course of action.

The Primary Vendor may suggest at his discretion, in his proposal, the use of other sub-consultants to fulfill this project in the highest possible quality manner. All sub-consultants must be identified and are subject to approval as stated here. Qualifications and background information is required as specified in the "Key Personnel" section of this RFP. All design work, including parking, must follow the specifications contained within the *2002 Human Use / Natural Resource Management Plan for Whitefish Point and Amendment*.

E. Inventory

Below are the required inventory items that will be utilized by the planning vendor while developing the Engineering Design Plan.

**EUPRPDC will be responsible for gathering and compiling the following datasets.**

1. Copies of the 2002 *Human Use / Natural Resource Management Plan for Whitefish Point and Amendment* in both electronic and hardcopy form.
2. Most recent BLM cadastral survey of Whitefish Point.
3. Historic drawings and photographs of the original Second Assistant Keepers Quarters.

**The Vendor will be responsible for gathering and compiling the following information.**

1. A copy of each Planning and Zoning ordinance text from Whitefish Township.
2. Any required information from the Chippewa County Road Commission including a copy of the DNR property easement.
3. The terms of the current Overflow Parking Lot easement from the State of Michigan.
4. Any additional documentation as required.

F. Public Meeting and Due Date

Public involvement and awareness is a key component of the plan development process. The vendor will host a minimum of one (1) public meeting, to present the draft Engineering Plan, approximately two-thirds (2/3) through its completion process. The public meeting should be held on or about **July 16, 2012**. The Primary Vendor should have a basic version of the draft plan completed by this date for presentation at the public meeting. The vendor will be responsible for providing meeting notices, an agenda, minutes and support materials such as maps and graphics. The meetings should include a formal presentation of the plan, and an opportunity for public verbal and written comment.

Prior to beginning preliminary design, the Vendor will meet with the three stakeholders (Great Lakes Shipwreck Historical Society, Michigan Audubon Society, and the U.S. Fish and Wildlife Service), Whitefish Township, and the Chippewa County Road Commission to ensure a clear understanding of the Engineering Plan's goals and objectives and each entity's role, responsibilities and actions required of them as part of this process.

G. Deliverables and Due Dates

1 - The Primary Vendor will complete a 75% complete draft and a final 100% complete Engineering Design Plan for selected elements that are identified in this RFP as approved in the *2002 Human Use / Natural Resource Management Plan for Whitefish Point and Amendment*.

2 – The Primary Vendor will complete a 75% complete draft and a final 100% complete set of Construction Documents for selected elements that are identified in this RFP as approved in the *2002 Human Use / Natural Resource Management Plan for Whitefish Point and Amendment*. These documents shall include Cost Estimates, Construction Plans and Construction Specifications, and any other Documents generally accepted in the industry for this type of construction work: for example, elevations, and a detailed list of required permits to implement actual construction.

The above documents shall be created for the following construction activities to take place at Whitefish Point. Page below numbers refer to specific pages of the attached *2002 Human Use / Natural Resource Management Plan for Whitefish Point and Amendment* which shall guide all eventual construction activities. Prospective Vendors are urged to read these pages carefully.

Second Assistant Keepers Quarters/Orientation Center, pp. 57-58

Visitor Orientation Plaza, pp. 35-39

Human Use Trails and Controls, pp. 30-35 and pp. 43-45

Habitat Restoration, Enhancement, as mitigated, pp. 30-35 and pp. 40-41

Trailhead and Motorized/Non-Motorized Parking – North, pp. 46-50

Trailhead and Motorized/Non-Motorized Parking – South. pp. 46-50

Right-of-Way Parking and Bike Path Alternatives, p. 49-50

Note: Two specific items reflected in the original Plan have been removed, 1) museum wings; and 2) service drive parking, whereas, the owner Great Lakes Shipwreck Historical Society agrees to eliminate from the 2002 Plan provisions calling for the service drive and parking adjacent to the GLSHS west property line, north of Whitefish Point Road, where drive and parking does not now exist. (These items are the subjects of the proposed January 20 amendment action.)

The Primary Vendor shall be required to schedule, provide agenda and meeting minutes for the following series of meetings during the course of this project. This schedule is subject to change. The Primary Vendor may invite sub-consultants to attend.

The Vendor shall provide 10 copies of Plans, Proposal, Cost Estimate, Schedule and list of information needed from the Owner for each of the following meetings with the exception of the kickoff meeting.

Meeting # 1: Kickoff and Grade Inspection – **March 19, 2012**  
To be held on-site at Whitefish Point, Michigan

Meeting # 2: 50% progress Meeting – **June 18, 2012**  
To be held in Sault Ste. Marie, Michigan

Meeting # 3: Public Meeting – **July 16, 2012**  
To be held at Paradise, Michigan

Vendor will supply all displays and handout material for the meeting. The Vendor will contact MDOT at least two weeks prior to the meeting date.

Meeting # 4: 100% progress of Final Draft meeting – **August 31, 2012**  
To be held in Sault Ste. Marie, Michigan

Meeting # 5: Project Closeout Meeting – **September 15, 2012**  
Primary Vendor Presents Final Plan and Final Construction Documents  
To be held at **Whitefish Point, Michigan**

The Primary Vendor will consider input taken at the public meeting mentioned as # 3 above to make improvements to the initial draft version of the Engineering Plan, with additional input from the GLSHS, EUPRPDC, MDOT, MAS, USFWS, and members, (voting and non-voting) of the Whitefish Point Joint Committee. The Vendor will then produce a secondary draft version of the Engineering Plan.

The secondary draft version is to be submitted to the GLSHS, the EUPRPDC, MDOT, MAS, USFWS and members (voting and non-voting) of the Whitefish Point Joint Committee for review and comment, in sufficient time to allow for revisions before the final due date.

Due Date of Secondary Draft Plan: **August 1, 2012**

Due Date of Final Plan: **August 31, 2012**

Due Date of All Construction Documents: **September 15, 2012**

Fifteen (15) copies of the draft plan will be delivered, and fifteen (15) copies of the final plan. All copies are to be delivered to the EUPRPDC for further distribution. The draft and final Plan should be submitted in both hard copy form and electronically (CD). The complete electronic document will be delivered in (a) an editable Microsoft format and (b) in Adobe Acrobat (.pdf) format. The EUPRPDC will post both the draft and final copies on its web site.

2 - An Executive Summary will also be included as part of the Engineering Design plan.

3 – The primary Vendor will deliver eight (8) copies of a complete set of Construction Documents. One of these copies shall be filed with the Michigan State ByWays Coordinator; one copy shall be filed with the MDOT TSC in Newberry, Michigan; one copy shall be filed with the Michigan SHPO; two copies shall be provided to the Great Lakes Shipwreck Historical Society; and three copies shall be provided to the EUPRPDC.

H. Other Requirements

The Vendor will submit monthly written progress reports with a monthly invoice for services rendered to the Great Lakes Shipwreck Historical Society. The progress report will reflect project progress, milestones and pertinent issues. Copies of progress reports shall also be distributed to the EUPRPDC; MDOT; USFWS; MAS; DNR; and the CCRC.

Each progress report shall include: 1) What was accomplished since the last report; 2) What will be accomplished in the next month; 3) The status of the schedule and milestone dates; 4) Current engineering budget, amount invoiced this period and total percent invoiced to date; 5) Plan/Proposal percent completed; 6) Known or anticipated problems or obstacles to completing project deliverables.

In addition to work products described in this RFP, all reports prepared by the Vendor, including all graphics and texts, as instruments of service, and all data collected as part of this project, together with all computer generated disks, tapes, summaries, and charts derived therefrom, are the property of the owner Great Lakes Shipwreck Historical Society and EUPRPDC / MDOT. All EUPRPDC / MDOT property will be relinquished to the EUPRPDC at the conclusion of this project.

**IV. INFORMATION REQUIRED FROM THE VENDOR**

Technical Proposal

Provide a description of the methodology, work product, and schedule for completing each element of the scope of work. A proposal should be prepared simply and economically, providing a straightforward, concise description of the vendor's ability to meet the requirements of the RFP. Fancy bindings, colored displays, promotional material, and similar ornamental features should not be included. Emphasis should be on completeness and clarity of content.

A. Business Organization

State the full name and address of your organization and, if applicable, the branch office or subordinate element that will perform or assist in performing the work. Indicate whether you operate as an individual,

partnership or corporation. If as a corporation, include the state in which you are incorporated. Include your firm's Federal Identification Number.

**B. Vendor Qualifications and Prior Experience**

Include as a part of your proposal a brief statement concerning the recent experience of the persons from your firm who will be actively engaged in creating the Engineering Design Plan. Do not include firm experience unless persons who will work on this project participated in that experience, and clearly state his/her role.

In addition to specific technical capabilities required of the vendor to perform this project, as in the application of cultural resource design experience as stated in III. B. above, it is desired that the vendor project manager have detailed knowledge and experience that can be applied to an overall understanding of state and federal highway financing and highway program delivery procedures, the ability to coordinate with MDOT and the Michigan State Historic Preservation Office, and other appropriate agencies or individuals.

**C. Key Personnel**

Specific background information on key individuals who will be assigned to the project must be included. The background information on these individuals should emphasize their experience relative to project requirements. The proposed key personnel must be the personnel assigned to the project. Key people are defined as those people whose qualifications and experience are essential to providing quality services. The Vendor's project team means the personnel assigned by the vendor and the sub-consultant(s) who are responsible for the completion of the services. All may be required to attend a meeting with MDOT, the EUPRPDC, GLSHS, MAS, and USFWS.

The contract for this project will contain a provision that the vendor may not replace key people without prior written approval from the owner Great Lakes Shipwreck Historical Society, EUPRPDC, MDOT, USFWS and MAS. A violation of this provision will be considered a breach of the contract, and GLSHS/EUPRPDC/MDOT/USFWS/MAS may terminate the contract.

**D. Project Management**

1. The Vendor's project manager must be readily accessible to the owner Great Lakes Shipwreck Historical Society's Development Officer and the EUPRPDC staff. Response to this RFP should include a proposal to address and clarify all aspects of project administration, quality assurance, variation and change control, contract deliverables, budget and cost control, schedule control, and internal/external coordination.

2. The Great Lakes Shipwreck Historical Society (GLSHS) Development Officer shall be the official contact person for the vendor. The vendor must either address or send a copy of all project correspondence to the GLSHS Development Officer. This includes all verbal contact records. The Vendor shall provide monthly updates to the EUPRPDC Executive Director, MDOT Regional and/or TSC Manager, the State Scenic Byways Coordinator, USFWS, MAS, and to the Whitefish Point Joint Committee. The vendor may use e-mail to perform these updates.

3. The vendor will update the GLSHS Development Officer, MDOT, and the EUPRPDC on a monthly basis with a progress report that clearly reflects progress, timeliness, and budget. The vendor will attend any additional study-related meetings as directed by the GLSHS Development Officer.

4. The vendor will maintain a project record, which includes a history of significant events (changes, comments, etc.) which influenced the development of the research report and receipt of information.

5. The vendor shall notify the GLSHS Development Officer whenever discoveries or new information has the potential to require changes in the scope, limits, quantities, or costs of the project.

E. Project Schedule and Staff Allocation

Provide a detailed project schedule that shows the milestones and deliverables. Include the number of hours allocated for each staff person for each task for the duration of the contract.

F. Authorized Negotiators

Include the names and telephone numbers of your organization's personnel authorized to negotiate the proposed contract with GLSHS/EUPRPDC/MDOT/USFWS/MAS. In the event that this proposal, and the subsequent negotiations, lead to a contract, you will be asked to provide a written verification that the person signing the contract is authorized to do so. If this will require a meeting of the Board of Directors or the Partners of your firm, you should begin arrangements so that the contract will not be delayed.

G. Sub-consultants

All sub-consultants must be identified and are subject to approval by the owner Great Lakes Shipwreck Historical Society and the EUPRPDC. Qualifications and background information is required as specified in the "Key Personnel" section of this RFP.

The contract for this project will contain a provision requiring prior written approval to sublet any of the services. Any proposed subcontract must

be submitted to the owner Great Lakes Shipwreck Historical Society and the EUPRPDC for MDOT's review and approval prior to execution.

H. Price Proposal

Instructions and format for the price proposal are attached. The price proposal must be submitted apart from the technical proposal in a sealed envelope clearly marked, "Price Proposal" with the vendor's name identified on the front of the envelope. The price proposal will only be opened for the highest scoring technical proposal. The other unopened price proposals will be returned to the respective vendor.

V. **PROPOSAL EVALUATION AND AWARD CRITERIA**

All proposals received by the deadline shall be subject to an evaluation by the GLSHS Development Officer and the EUPRPDC Executive Director, assisted by the remainder of the Selection Team (MDOT, USFWS and MAS) for the purpose of selecting the Vendor with whom a contract will be executed. Proposals must be complete and responsive to all sections of the RFP. Proposals which do not fulfill all program requirements or omit any of the proposal contents as described in the RFP may be rejected.

The GLSHS/EUPRPDC/MDOT/USFWS/MAS reserve the right to award by item, part or portion of an item, group of items or total proposal, and to reject any and all proposals in whole or in part if the best interest of GLSHS/EUPRPDC/MDOT/USFWS/MAS will be served.

The proposals will be evaluated based on a two-step process. The first step will involve an evaluation of each Vendor's technical proposal, using the selection criteria below. The top ranked Vendors may be asked to make an oral presentation as a part of this step. The second step will involve reviewing the price proposal for the Vendor with the highest technical score from the first step. If GLSHS/EUPRPDC/MDOT/USFWS/MAS determine that the price proposal of the Vendor with the highest technical score is unreasonable, negotiations will commence. If an agreement cannot be reached, then the price proposal for the next highest technical score will be reviewed. This evaluation process will continue until a recommendation of award can be made in the best interest of GLSHS/EUPRPDC/MDOT/USFWS/MAS.

The criteria and the percentage of their importance in making the selection are as follows:

**METHOD OF APPROACH: 20 Percent.**

This refers to the technical soundness of the Consultant's stated approach to the project, the comprehensiveness of the proposed approach, and the techniques to be used.

**UNDERSTANDING THE PURPOSE: 10 Percent.**

A determination will be made of the Consultant's understanding of the project purpose and goals as presented in the RFP. Evaluation will be based on the

data presented in the Consultant proposal, and the approach and allocation of time on specific tasks. Consultants should feel free to suggest other requirements and problems that may have been overlooked.

**CAPABILITY AND QUALIFICATIONS: 40 Percent.**

We will evaluate the ability of a prospective Consultant to meet the terms of the RFP relative to having a consulting team with the qualifications needed to successfully complete the project. Qualifications of professional personnel assigned to the project, as specified in the proposal, including sub-consultants, will be measured by both education and experience, with particular reference to experience on projects similar to that described in the Scope of Work. The Consultant's professional and project staff who work on the project must be the same staff identified in the proposal. Sub-consultants must be approved by GLSHS/EUPRPDC/MDOT/USFWS/MAS, noting that specialized sub-consultants are required for 1) interior design of the 2<sup>nd</sup> assistant keepers quarters 2) Habitat Restoration and Enhancement (to be approved by MAS); and 3) elevation and drainage survey work.

**COOPERATIVE WORK EXPERIENCE: 10 Percent.**

This covers the prospective Consultant's experience working as a cooperative team with other Consultants and public agencies. Professional qualifications will be measured by experience on past projects within a cooperative team environment.

**ORIGINALITY OR INNOVATIVENESS OF PROPOSALS: 10 Percent.**

This RFP generally outlines the work activities and products expected by the GLSHS/EUPRPDC/MDOT/USFWS/MAS. A factor in the selection of a firm will also be any innovative approach that goes beyond the suggested Work Program. It must be shown how this will be accomplished within the time limits.

**SCHEDULE: 10 Percent.**

We will evaluate the clarity and adequacy of the detailed project plan and the ability of the consultant to appropriately allocate staff to the identified tasks.

## **PRICE PROPOSAL INSTRUCTIONS**

The Price Proposal shall be divided into two parts, as follows:

1. Derivation of Cost - Prime Consultant
2. Derivation of Cost - Sub-Consultant(s)

### **DERIVATION OF COST - PRIME CONSULTANT:**

Attached is a sample layout for the prime consultant's proposed costs. These costs are broken out into direct labor, overhead, direct costs, fixed fee, and concluding with a total estimated cost.

Direct Labor - Indicate each labor classification, the estimated hours for that classification, the related hourly rate for that classification, and the dollar total for that classification. At the bottom of the Direct Labor portion of the sheet, indicate the total hours and dollars for direct labor.

Overhead - Indicate the overhead rate being applied against direct labor. At the right, indicate the total overhead in dollars that results from the multiplication of the rate times the direct labor cost shown on this page.

Direct Expenses - List the direct expenses with a brief description of the expense and the actual cost of the purchase of that item. Indicate the total of these direct expenses at the bottom right of this portion of the sheet.

Fixed Fee - Indicate the fixed fee percentage for this project. This fee is to be applied against direct labor and overhead only, not against direct expenses. At the right, indicate the total of this calculation.

Subtotal Prime Consultant - At the bottom of the page, indicate the sum of the direct labor, overhead, direct expenses and fixed fee as calculated on this page for the Prime Consultant.

Subconsultant Total(s) - List the total estimated costs for each subconsultant, if any. Each subconsultant must also have a separate page itemizing these costs.

Total Estimated Costs - Indicate the sum of the total estimated costs for the prime Consultant and all subconsultants.

### **DERIVATION OF COST - SUB-CONSULTANT(S):**

Use the attached sample layout for the subconsultant(s) proposed costs. A separate sheet for derivation of costs must be submitted for each subconsultant in the same manner as described above for the prime Consultant.

### **FEDERAL IDENTIFICATION NUMBER:**

Provide the Federal I.D. Number of the Prime Consultant and the Subconsultant(s).

**DERIVATION OF COST PROPOSAL**

**PRIME CONSULTANT NAME**

Federal ID #00-000000

**ESTIMATED DIRECT LABOR**

<u>Classification</u>	<u>Estimated Person-hours</u> x	<u>Hourly Rate</u>	=	<u>Labor Costs</u>
ABC Position	0,000	\$00.00		\$00,000.00
DEF Position	0,000	\$00.00		\$00,000.00
Total Estimated Hours <u>00,000</u>				Total Estimated Labor <u>\$ 000,000.00</u>

**ESTIMATED OVERHEAD**

\$000,000.00 x 000.00% = Total Overhead \$ 000,000.00

(Total Estimated Labor)

**ESTIMATED DIRECT EXPENSES**

(Listed by Item at Estimated Actual Cost to you - NO MARKUP)

Expense #1	\$ 00,000
Expense #2	\$ 0,000
Expense #3	\$ 000
Total Direct Expenses	<u>\$00,000</u>

**FIXED FEE**

\$0,000,000.00 x 00% = Total Fixed Fee \$ 000,000  
(Total Estimated Labor + Overhead)

**SUBTOTAL - PRIME CONSULTANT** \$00,000,000  
(Sum Totals: Labor, Overhead, Direct Expenses, Fixed Fee)

Total ABC Subconsultant	<u>\$ 000,000</u>
Total DEF Subconsultant	<u>\$ 000,000</u>

**TOTAL ESTIMATED COSTS** \$00,000,000.00  
(Sum Totals: Prime & Subs)

**DERIVATION OF COST PROPOSAL**  
**SUB-CONSULTANT NAME**

(Submit a separate page for each Subconsultant.)

Federal ID #00-000000

**ESTIMATED DIRECT LABOR**

<u>Classification</u>	<u>Estimated Person-hours</u>	x	<u>Hourly Rate</u>	=	<u>Labor Costs</u>
ABC Position	0,000		\$00.00		\$00,000.00
DEF Position	0,000		\$00.00		\$00,000.00
Total Estimated Hours <u>00,000</u>					Total Estimated Labor <u>\$ 000,000.00</u>

**ESTIMATED OVERHEAD**

\$000,000.00 x 000.00% = Total Overhead \$ 000,000.00

(Total Estimated Labor)

**ESTIMATED DIRECT EXPENSES**

(Listed by Item at Estimated Actual Cost to you - NO MARKUP)

Expense #1  
Expense #2  
Expense #3

**FIXED FEE**

\$0,000,000.00 x 00% = Total Fixed Fee \$ 000,000  
(Total Estimated Labor + Overhead)

**TOTAL ESTIMATED COSTS**

\$00,000,000  
(Sum Totals: Labor, Overhead, Direct Expenses, Fixed Fee)