

Confederated Tribes of the Umatilla Indian Reservation
(CTUIR)

REQUEST FOR PROPOSAL (RFP)
TRIBAL HOUSING DEVELOPMENT SERVICES

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ISSUED: SEPT 1, 2023

DUE: BY 2:00 PM, SEPT 20, 2023

1. BACKGROUND

The Confederated Tribes of the Umatilla Indian Reservation (CTUIR) is currently accepting proposals for Project Management Services for several Housing related projects.

The purpose of this Request for Proposal (RFP) is to solicit proposals from various candidate organizations; conduct a fair and extensive evaluation based on criteria listed herein and select the candidate who best represents the direction the CTUIR wishes to go.

2. PROPOSAL GUIDELINES

This Request for Proposal represents the requirements for an open and competitive process. Proposals will be accepted until 2 pm PST September 20, 2023. Any proposals received after this date and time will be returned to the sender. All proposals must be signed by an official agent or representative of the company submitting the proposal.

If the organization submitting a proposal must contract any work to meet the requirements contained herein, this must be clearly stated in the proposal. Additionally, all costs included in the proposals must be all-inclusive to include any contracted work. Any proposals which call for contracting work must include the name and description of the organizations being contracted.

All costs must be itemized to include an explanation of all fees and costs.

Contract terms and conditions will be negotiated upon selection of the winning bidder for this RFP. All contractual terms and conditions will be included in a Professional Service Agreement (attached) subject to review by the Tribe's legal department and will include scope, budget, schedule, and other necessary items pertaining to the project.

3. PROJECT SCOPE

The scope of this project includes pre-design services, coordinating with design firms, contract requests for proposals and bidding, overseeing contractors selected and construction management services, as well as serving as the liaison between the contractors and subcontractors and the Owners and Housing Project Team. The Owners being the Board of Trustees, and the Housing Project Team being designated by the Board of Trustees to steward these projects to successful completion. Project management firm will solicit bids and the CTUIR will contract directly with these firms unless otherwise agreed to by both parties.

The Tribe has selected 4 different housing developments to complete in the coming years; a) Veteran & Elder Village Housing options and development, b) Nagel Property infrastructure for residential lots, c) Associated Services, a multistory, mixed-use development at Nixyáawii Neighborhood, and d) Assisted Living Facility needs assessment, feasibility, business plan and possible construction.

Veteran & Elder Housing Options – Conduct a 20-year needs assessment and feasibility for elder and veteran housing options including new development, age-in-place support, elder support training for individuals, etc. This will take into account the current development project: 9 lots at Nixyáawii Neighborhood have been selected for development of a Veteran & Elder Village Home Development. Project includes 18 cottage style homes, courtyards, and internal paths and landscaping. The project is the subject of a current Oregon Housing & Community Services grant application. If awarded, the successful awardee would work with the preferred firm for construction of homes. In the event of a non-award, alternate funding feasibility needs to be explored to successfully complete the project.

Nagel Property – Coordinate A&E services for the design and engineering of infrastructure, bidding for infrastructure on the ~71.86 acres site south of Coyote Business Park South for single family housing. If the development is economically feasible, then solicit design construction firms and coordinate the construction of those facilities.

Associated Services – A multi-story, mixed-use development at Nixyáawii Neighborhood Services lots totaling ~25,000 square feet in lot area. Main floor will include commercial and services tenants, a community center with an office and kitchen primarily for the used of Veterans and Elders; second and possibly third floor offices and apartments that are mixed income, elders, veterans, and market rate. Parking will be on the ground floor off the alley as well as improvements to Naxs Winatas to accommodate street parking. Solicit firms to complete a business plan that would include estimated construction costs and estimated rental rates as the important criteria. If the development is economically feasible then solicit construction firms and coordinate the construction of this facility.

Assisted Living Facility – Coordinate and assist in conducting a needs assessment, feasibility, business plan and if the project is feasible and approved to move forward then coordinate to solicit firms to complete the design, permitting, and construction of the facility.

Development Phases

The following criteria will be followed during any construction projects:

Pre- Development Phase

- **Assist with selection of contractors to conduct feasibility studies and needs assessment, and business plans as necessary.**
- **Assist with selection of contractors to undertake predevelopment exploratory research as needed on subject properties such as NEPA, cultural resources, geotechnical, and surveys.**

Design Phase

- **Assist with the RFP and selection of the Architect/engineering firm for infrastructure & housing development.**

- Coordinate selection process for all contractors and vendors including contract negotiations.
- Make design recommendations relating to constructability, cost effectiveness and suitability and develop cost estimates.
- Coordinate project permitting process and ensure all permits are submitted as required.
- Coordinate with the contractor and TERO office to develop and implement a plan to maximize Tribal hiring.
- Coordinate with Energy Trust of Oregon on any housing development.

Construction Phase

- Act as Owner's Representative and liaison between the contractor and design consultants as appropriate.
- Conduct project meetings and ensure that accurate meeting records are produced.
- Review and make recommendations to the Owner related to contractor's Requests for Information (RFI) and Change Order Requests (COR).
- Monitor project schedule and take appropriate action to ensure compliance with agreed milestones and completion dates.
- Monitor construction costs and take appropriate action to ensure compliance with the agreed construction budget.
- Monitor project quality and take appropriate action to ensure compliance with contract documents.
- Review and make recommendations to Owner for approval of progress billings.
- Coordinate other project consultants such as Commissioning Agent, Building Envelop Consultant, Testing/Inspection Firm and FF & E consultants.

Warranty and project closeout phase

- Manage project closeout process to insure timely and acceptable completion of punch-lists, as-built drawings, O & M manuals, occupancy permits and final payment releases.
- Maintain files of all pertinent correspondence and documentation
- Facilitate timely response to issues throughout the 12-month warranty phase.

Other Duties

- Consultant will perform other duties related to the planning and construction of the various housing projects as assigned by the Owner and agreed to by the Consultants.

4. REQUEST FOR PROPOSAL AND PROJECT TIMELINE

Request for Proposal Timeline:

All proposals in response to this RFP are due no later than 2 pm PST September 20, 2023.

Evaluation of proposals will be conducted from September 25, 2023, until September 29, 2023. If additional information or discussions are needed with any bidders during this 10-day window, the bidder(s) will be notified.

The selection decision for the winning bidder will be made no later than October 6, 2023.

Upon notification, the contract negotiation with the winning bidder will begin immediately. Contract negotiations will be completed by October 20, 2023.

Notifications to bidders who were not selected will be completed by October 13, 2023.

Project Timeline:

Project initiation must be started by November 1, 2023.

Project completion must be completed by October 30, 2026.

5. BUDGET

All proposals must include proposed costs to complete the tasks described in the project scope. Costs should be stated as one-time or non-recurring costs (NRC) or monthly recurring costs (MRC). Pricing should be listed for each of the following items in accordance with the format below:

Veteran & Elder Village Home Construction	NRC	MRC
Nagel Property	NRC	MRC
Associated Services	NRC	MRC
Assisted Living Facility Feasibility and Construction	NRC	MRC
Other Duties not listed above	NRC	MRC

NOTE: All costs and fees must be clearly described in each proposal. All NRC should be detailed including proposed subcontract work. Prepare your cost estimates using a 36 month schedule from hiring the design firms, business plan firms and construction firms.

Include a copy of your company's pay rate schedule.

6. BIDDER QUALIFICATIONS

Bidders should provide the following items as part of their proposal for consideration:

- Description of experience in planning, building, and successful completion of past projects
- List of how many full time, part time, and contractor staff in your organization
- Testimonials from past clients on your company's work
- Anticipated resources you will assign to this project (total number, role, title, experience)
- Project management methodology
- Local involvement and history of working with Indian Tribes

7. PROPOSAL EVALUATION CRITERIA

CTUIR will evaluate all proposals based on the following criteria. Your proposal should follow the format below and should be less than 30 pages, single sided, minimum 11-point font. Divider sheets are required and will not be included in the page count. Facsimile or e-mailed transmissions will not be accepted. To ensure consideration for this Request for Proposal, your proposal should be complete and include all of the following criteria in:

- Firm Background (10 points): Describe your firm including ownership structure, service area, volume of project management services, length of time in the industry and financial stability.
- Local Knowledge (10 points): Describe your understanding of the locality of the project site and the unique considerations of working on the CTUIR Reservation. Describe your firm's plan to help maximize the economic impact on the Tribal community. Provide specific examples of your track record.
- Previous experience and work (10 points): Provide recent experience on similar facilities, clearly noting work performed. Provide reference contact person and telephone number for these projects.
- Staffing plan (25 points): Provide a detailed and specific discussion of your firm's proposed staffing plan. Include an organizational chart, description of staff roles, resume and other relevant information. Describe your plan to effectively provide services on several concurrent projects.
- Approach (15 points): Provide a general discussion of your management philosophy. Include a description of your firm's involvement from the planning phase through the completion of the project. Provide examples of your methods to ensure quality, budget, and schedule control.
- Value and cost (25 points): Provide a detailed breakdown of your proposed fee, clearly stating any items not covered by your fee. State whether your proposed fee is a lump sum or not-to-exceed amount.
- Indian Preference and TERO Certification (5 points): Provide documentation to confirm your firm is at least 51% Native-owned and that your firm is certified as Native-owned by the CTUIR TERO program.

Each bidder must submit 5 copies of their proposal to the address below by September 20, 2023, at 2 pm PST:

Confederated Tribes of the Umatilla Indian Reservation
c/o Department of Economic & Community Development
46411 Timíne Way
Pendleton Oregon 97801

Attachments
Professional Services Agreement template
Map of housing locations