



REQUEST FOR QUALIFICATIONS

Professional Consulting Services for Construction Manager as Adviser to the Fort Apache Heritage Foundation, Inc.,

Request for Qualifications released: December 15, 2022

Mandatory Pre-Submittal Meeting: 11:00 a.m., January 25, 2023

Qualifications must be received by: 1:00 p.m., February 3, 2023

Three (3) Sealed Hard Copies of Qualifications Must be Labeled and Delivered to:

Fort Apache Foundation, Inc., Headquarters
Attention: Krista Beazley, CEO
104 General Crook Street
Fort Apache, Arizona 85926

One (1) Electronic Copy of Qualifications Must be Emailed to:

kbeazley@fortapachearizona.org

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ATTACHMENTS

ATTACHMENT A: Position Description and Responsibilities

I. STATEMENT OF PURPOSE and SCOPE OF SERVICES

This Request for Qualifications (RFQ) and respective ATTACHMENTS describe the Scope of Services, qualification requirements, and selection process for a retaining a Construction Manager as Adviser (CMa). A draft Standard Professional Services Agreement is provided.

As noted in **ATTACHMENT A**, the Fort Apache Heritage Foundation (Foundation), as the designated representative of the Fort Apache property owner, the White Mountain Apache Tribe, is issuing this RFQ a Construction Manager as Adviser (CMa) for the House of Harmony Project (Project).

Services in summary: The selected CMa will act as the Foundation's independent adviser and agent during the planning, design, and construction phases for the rehabilitation of Building #116 (former Boys' Dormitory), located within the Fort Apache and TR School National Historic Landmark. The Project's will rehabilitate the historic former Boys' Dormitory, resulting in the adaptive re-use of the structure and its immediate surroundings as the House of Harmony, a dynamic live/work complex for the Whiteriver, AZ community (Community), designed especially for Community service providers.

Under the direction of the Foundation's Site Development Committee (SDC), and in coordination with the Project's Consultant and Contractor, the CMa shall serve as the Project's internal Project manager.

The selected CMa shall serve as an independent provider of professional services and advice to the Foundation for the duration of Project, from final design, through construction completion and close-out. The Project's current estimated timeframe is 18 months, beginning February 2023. The Project's timeframe, including its start date, is subject to change. The Foundation is seeking additional funds for additional construction efforts; contract extension is likely, depending on performance.

The CMa position shall not be construed as being hired by or commissioned as an employee of the Foundation or the White Mountain Apache Tribe. This position shall not provide health or other benefits. CMa compensation would be \$65.00–75.00 per hour, depending on experience.

II. MANDATORY PRE-PROPOSAL MEETING

The **Mandatory Pre-Proposal Meeting** is scheduled for **11:00am on January 25, 2023**, convening at the former Fort Apache Boy's Dormitory, located just south of the Post Office, Fort Apache, Arizona 85926. The Mandatory Pre-Proposal Meeting will entail a walking tour of the building and Project site, providing an opportunity for questions and answers regarding the solicitation requirements and Project scope. **Requests for Clarification/RFIs:** Prospective responders shall direct inquiries or questions regarding the RFQ in email form **no later than January 25, 2023** to: Krista Beazley, Foundation CEO kbeazley@fortapachearizona.org.

III. MANDATORY SUBMITTAL REQUIREMENTS

Each proposer shall submit **three (3) sets** of the proposal in hard copy. The proposals shall be submitted in a sealed envelope, delivered to the Fort Apache Foundation, Inc., Headquarters office located at 104 General Crook Street, Fort Apache, Arizona 85926, and be legibly labeled:

**PROPOSAL FOR CONSTRUCTION MANAGER AS ADVISER
SUBMITTED TO FORT APACHE HERITAGE FOUNDATION
Attn. Site Development Committee**

All Qualification proposals **MUST** be received no later than **1:00 p.m., February 3, 2023**. Submittals received after this deadline shall be returned to the respective submitting party, unopened. Proof of receipt of the submittal is the Foundation's date/time stamp.

All costs incurred related to the proposal's preparation or in any way associated with the applicant's preparation, submission, meeting attendance, delivery, or presentation shall be the sole responsibility of the proposer.

IV. MANDATORY SUBMITTAL FORMAT REQUIREMENTS

The requirements of this section are mandatory. Any proposal submitted without adherence to these requirements will be deemed incomplete and excluded from further consideration:

1. Proposals shall not exceed ten (10) single-sided 8 ½ "x 11" pages, in a minimum 11-point font. The 10-page maximum includes cover letter describing the proposer's interest and commitment to perform work necessary to provide Construction Manager as Adviser Services, the proposer's resume, and any other documentation the proposer asserts may be useful in selecting the CMA.
2. As previously mentioned, interested parties shall submit three (3) hard copies, and one electronic copy of their Statement of Qualifications as noted on Page 1 of this RFQ.
3. Provide at least three references (names, phone numbers, email addresses) from recent work (previous six years) similar to the services outlined in this request for qualification. Please include a brief description of the work and the role your firm performed.
4. List key staff members, as needed, including identification of the Principal-in-Charge and Project Manager/primary point-of-contact.

V. SELECTION PROCESSES

Proposals will be evaluated and ranked by the Foundation's Site Development Committee (SDC), which is composed of Foundation Board members and volunteers. SDC will assess the submitting party's qualifications, experience, and ability to perform the work. The proposals receiving the highest ranking may be invited for an interview. The following six criteria will be

used in CMA ranking and selection (see also the Attachment A list of CMA Knowledge, Experience, and Responsibilities):

1. Responsiveness to this Request for Qualifications and to SCD requests, if any, for additional information.
2. Organization: Does the individual offer the breadth and quality of services required for the type of services necessary for this position
3. Experience with engagement of similar scope and complexity
4. Professional status, including certifications, licenses, and registrations
5. Satisfaction of references
6. Local sensitivity and knowledge of the White Mountain Apache Tribe and its respective governmental and regulatory agencies

The SDC's highest scoring CMA candidate's information shall be presented to the Foundation Board for their review. Upon said Board's approval, the Foundation shall develop and execute a consultant services agreement with the selected CMA. The agreement and Project initiation shall reflect the following considerations:

1. Time is of the essence thus, the Foundation's Board, CEO, Staff and SCD shall endeavor to promptly complete the proposal evaluation process and enter an agreement ASAP.
2. Receipt of proposals in response to this RFQ does not obligate the Foundation or White Mountain Apache Tribe in any way to engage any person or persons.
3. The Foundation and the White Mountain Apache Tribe reserve the right to reject any and all proposals, wholly or in part, at any time, without penalty.
4. The Foundation retains the right to abandon the selection process at any time prior to the actual execution of an agreement with any party. The Foundation and bears no financial or other responsibility in the event of such abandonment.
5. The Foundation reserves the right to negotiate all final terms and conditions of any agreements entered into.
6. If the Foundation, in its sole opinion, cannot successfully negotiate an agreement with any applicant, the Foundation may terminate negotiations, without penalty to the Foundation, and invite the next most qualified CMA candidate for possible consideration.

V. GOVERNING LAW

All contract and legal relations between the parties hereto shall be governed and construed in accordance with the laws of the White Mountain Apache Tribe.

ATTACHMENT A: Position Description and Responsibilities

CONSTRUCTION MANAGER as ADVISER

Job Description for the Building 116 Rehabilitation Project

The Fort Apache Heritage Foundation of the White Mountain Apache Tribe (Foundation) is filling an **AT WILL** Position to serve as Construction Manager as Adviser (CMA). The selected CMA will operate as an independent third party acting as the Foundation's agent during the planning, design, and construction phases for the rehabilitation of Building #116 (former Boys' Dormitory, and may also be referenced as "Boys' Dorm" herein), located within the Fort Apache and TR School National Historic Landmark (Project).

The Construction Manager as Adviser (CMA) position (Position) shall serve as the Foundation's and its Foundation's lead representative and Project manager for all tasks related to the administration, implementation, monitoring, and successful completion of the Fort Apache – Boys' Dormitory Rehabilitation Project (Project). Position-related tasks are noted below, but will also likely include other work tasks as needed and assigned.

The Position shall serve under the Foundation's Site Development Committee (SDC), and will be responsible for being an integral part of the Project's Construction Phase Team (Team).

Once selected, the CMA shall enter an Agreement between the CMA and the Foundation for immediate inclusion on the Team. The Project Team presently consists of SWABACK Architects + Planners as the Prime Consultant (Consultant) and the Foundation's Site Development Committee, but will also include the CMA and the construction Contractor's firm (Contractor) once the CMA and the Contractor are selected. In addition to the Project Team, the CMA may also be assigned to communicate and coordinate with representatives of Project funding agencies, principally the U.S. Economic Development Administration and Arizona State Parks (Grantors).

This is an At Will position, and is not a permanent, 40-hour per week position. It is expected that the candidate that fills this Position may and will concurrently be working on other construction administration projects within the region for other employers or as an independent contractor. Thus, the Position shall be compensated for certified billable hours. Billable hours shall be coordinated and aligned in concurrence, and in advance, with the Fort Apache Heritage Foundation's CEO prior to working said hours, recognizing that on occasion, hours worked may need to exceed the number of hours the person filling this Position and the CEO have agreed to.

The Position shall last from inception of the Project's pre-construction phase through the Projects construction completion. It is estimated that the Project's pre-construction phase, thus, this Position, may begin in early February 2023. The Project's construction phase is estimated to be completed by December 2024. In the event the Project's construction phase goes beyond this estimated end date, the Position's timeframe will be adjusted accordingly.

Target compensation rate \$65.00–75.00 per hour, depending on experience.

Estimated Start Date: February 13, 2023

Estimated Number of Hours per Week: 8 – 16, depending on Project work levels and flows

Benefits: Not applicable

Position details are as follows:

CMA Knowledge, Experience, and Responsibilities

The CMA shall be familiar with and implement industry standards for construction services and practices stipulated by the American National Standards Institute (commonly known as ANSI), and those specified by the National Register of Historic Places for this Project, recognizing the Boys' Dorm is a significant contributing element to the site's National Historic Landmark designation.

The CMA shall align work efforts to support the multiple Project funding streams supporting the Project. The CMA shall also be familiar with and implement processes, including those related to the Project's specific advisement, monitoring, management, and fiduciary requirements to ensure compliance with all statutes, rules, codes, and regulations. The bulleted list that follows defines the CMA scope of services, with the notice that this scope will only become finalized through required consultation and coordination between the CMA and the Consultant:

- Refine, finalize, monitor, manage, maintain currency of and adherence to Project Execution Schedule and Project Budget
- Provide a Strategic Project Plan with explicit delivery strategies based on the Project objectives
- Assist the Consultant and Foundation in selection of a General Contractor
- Represent Foundation's interests and preferences throughout life of Project
- Assist in developing a preservation strategy to identify, preserve, and restore historic fabrics
- Conduct regular meetings with the Project Team, including the Project Contractor
- Facilitate communication between Foundation and the Project Team
- Coordinate allocation of grant funds to Project items consistent with Grantor requirements
- In coordination with the Contractor, facilitate early purchases/ storage of materials per time-sensitive Grantor requirements, as appropriate
- In coordination with the Contractor, facilitate early purchase/ storage of materials with long lead times
- In coordination and consultant with Consultant, recommend viable Value Engineering concepts to reduce cost where consistent with Project objectives
- Advise in selection of the best Project delivery method consistent with all Grantor requirements
- Monitor Contractor performance, including Project execution in accordance with Contract Documents
- Coordinate and respond to Requests for Information (RFIs) submittals, and scheduling and facilitating Project Team site visits
- Receive and analyze any and all proposed change directives or change orders, providing Foundation with recommended response options
- Review and administer Contractor billings and any other Project-related payment requests

- Obtain and file hard copies, and monitor all required construction permit, insurance, and lien waiver requirements
- Provide monthly Project status and progress reports to Foundation Site Development Committee relative to the Project Budget and Schedule
- Inform Foundation promptly of any issues affecting Project Budget and Schedule
- Advise and assist Foundation in the timely resolution of any Project issues or concerns
- Lead the Project Team in the integration of vendor installations
- Conduct Project punch list development and review with the Consultant
- Lead the Project Team in Project close out
- Coordinate with Consultant in review and approval of final Contractor payment certification, securing applicable Project warrantees, as indicated
- Manage Project commissioning and post-occupancy evaluation

Status of Project

The CMA will join the Project Team at an advanced stage of the Project planning and design, with the Consultant having delivered a Design and Development-level pricing package to a preconstruction consulting cost estimator.

Description of the Work, Job Description, and Responsibilities

This Project entails the adaptive repurposing of a building that is formally recognized as a contributor to the Fort Apache and Theodore Roosevelt School National Historic Landmark. This rehabilitation is an integral component in and complement to Fort Apache's adaptive reuse as a "town center" for the White Mountain Apache Tribe community. The Project will create live/work spaces and community facilities for members of Tribe, persons who may provide services to the community, and visitors.

The selected CMA shall serve an independent third party that provides professional services and advice to the Foundation relative to the Project. The CMA position shall not be construed as being hired or commissioned as an employee of the Foundation or the White Mountain Apache Tribe.

Under the direction of the Foundation Site Development Committee, and in consultation and coordination with the Project's Consultant and Contractor, the CMA shall serve as Lead Project Manager for this Project on behalf of the Foundation. In alignment with applicable industry standards, the CMA shall be responsible for administering all aspects of this Project.

Qualifications & Responsibilities

PRIOR EXPERIENCE: The selected CMA candidate shall have prior and verifiable (via references) experience with, and knowledge of:

- Application and coordination of all phases required for capital improvement projects, from concept design through construction completion and post construction services

- Ability to read, understand, and evaluate capital improvement plans, construction contract documents, specifications, and shop drawings
- Current capital improvement processes and applicable industry standards, including applicable permit and construction inspection requirements
- Project and construction management roles and procedures for complex capital improvements
- Coordination with technical design team(s) (e.g., architectural, engineering, or landscape architectural discipline), or with a construction/development team associated with multiple construction trades on complex capital improvement projects, or both (**NOTE:** Licensing in a related technical discipline or construction trade is preferred but is not mandatory if sufficient experience is demonstrated)
- Capital improvement project funding, budget tracking, and reporting
- Legal, fiscal, and scheduling implications related to consultant amendments and contractor change orders, including impacts of extended overhead
- Scheduling, planning, and leading regular weekly and special meetings of capital improvement project teams to track progress, respond to RFIs, and maintain projects schedules and budgets

KEY RESPONSIBILITIES FOR THIS PROJECT: The selected CMA will be responsible for successfully undertaking, coordinating, implementing, and completing the Boys' Dorm Rehabilitation Project through discharge of the following responsibilities:

- **Foundation's Representative/Project Manager:** Serve as the Foundation's Principal Representative/Project Manager for all Project aspects and phases
- **Communication:** Establish clear and effective lines of communication with the Foundation (via the Site Development Committee), Consultant, Contractor, and any other necessary parties, by scheduling, holding, and recording meetings, by developing and filing detailed written notes and photographic record(s), and by preparing and issuing, at a minimum, a concise monthly written report summarizing the Project and its progress, that shall be transmitted to the Foundation via the Foundation
- **Constructability Evaluation:** Meet with and advise the Consultant or Consultant's Team, and the Foundation, on the constructability of the Project, per its construction plans, specifications, schedule, and budget
- **Value-engineering:** Provide value-engineering analysis and, accordingly, make recommendations to the Consultant and the Foundation's Site Development Committee on possible means to reduce cost without compromising the Project goals, schedule, or budget
- **Architect's Estimate and Project Schedule:** The CMA shall advise the Consultant in, and refinement of, construction cost estimates including the "architect's estimate" and anticipated Project schedule
- **Funding Options:** The CMA will explore, identify, and pursue potential construction funding sources, including grants
- **Bid Packet Development and Dissemination:** As appropriate, assist with the Consultant's preparation and dissemination of the Project's bid packet
- **Construction Contractor Selection:** Assist the Consultant and Foundation's Site Development Committee with the Contractor selection process in accord with the following steps:
 1. Seek competitive bids

2. Assist Consultant in determining if Contractors' bids are responsible and responsive in regard with the Project's bid packet, plans, and specifications
 3. Assist Foundation in selection of Contractor on the basis of the Consultant's certification of the lowest responsible and responsive bid
 4. The CMA and Consultant will jointly present their recommendation to the Foundation, including recommendations regarding one of the following options:
 - A. Enter an agreement with the lowest cost responsible and responsive bidder
 - B. Reject all bids and reissue the bid packet (in the event this option is selected, typically because bids exceed an estimated construction budget, the CMA will assist the Consultant in identifying scope items, materials and finishes that may be modified, reduced, or dropped to realign the Project with available construction funds)
 - C. Phase the Project to retain vital Project elements and exclude inessential Project elements from the bid package, then rebid
- **Fast-track the Project:** In all circumstances, the CMA will manage all Project-related construction contracts and shall anticipate and minimize all foreseeable Project delays and budget overruns
 - **Prior Written Authorization for Amendments to Consultant's Agreement:** The CMA shall be responsible for reviewing all amendment requests and securing the Foundation's written authorization prior to approving any recommended Amendment(s) to Consultant Agreement
 - **Prior Written Authorization for Change Orders to Contractor's Agreement:** In consultation, coordination, and concurrence with the Consultant, the CMA shall be responsible for reviewing all change order requests and securing the Foundation's written authorization prior to approving any recommended Change Order(s) to the Contractor's Agreement
 - **Time is of the Essence:** In all cases, the CMA shall promptly present, process, and, subject to receiving the Foundation's prior written authorization, approve all Consultant Amendments/Contractor Change Orders in a timely manner to reduce or eliminate any potential construction delay(s)
 - **Weekly Meetings:** The CMA, in coordination with the Project's Consultant and Contractor, shall calendar, hold, and manage pre-scheduled weekly meetings throughout all Project phases, and promptly provide the Foundation's Site Development Committee, via email, a written summary of each meeting with three (3) days after the close of each weekly meeting
 - **Progress Payments:** CMA shall submit progress payment requests that have been certified by the Consultant and SDC to the Foundation CEO for processing and payment
 - **Project Completion/Close-out:** CMA, in consultation with the Project's Consultant, shall:
 1. In coordination with the Consultant set a date for the development and completion of a Punch List
 2. Inspect the Project and develop a Punch List that identifies construction-based items that do not comply with the Project's plans and specifications, are of questionable quality or finish, or are due to the Contractor's error or omission
 3. Submit the Punch List to the Consultant and Contractor, and set a date for the Contractor's review and completion of these Punch List items in a timely manner
 4. Once the Contractor has informed the Foundation that Punch List items have been completed, conduct the Foundation's final walk-through and inspection of the Project, alongside the Consultant

5. CMA and Consultant shall certify that Punch List items have been successfully completed and comply with the Project's goals, plans, and specifications
 6. CMA shall confirm in writing, and file, that Contractor has transmitted all required/applicable as-built drawings and warrantee items (if/as applicable) to the Foundation
 7. CMA shall confirm in writing that all industry standards for Project Completion and Close-out have been adhered to and addressed
 8. Once CMA and Consultant affirm, in writing, that the Project is successfully completed, final payment will be processed
- **Post Project Services:** CMA, in consultation and coordination with the Consultant and Foundation, will ensure that Contractor successfully performs all required, specified, and industry standard-based Post Project Completion services.

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