

REQUEST FOR PROPOSAL (RFP)
Historic Structure Assessment Report
for
Vista Historic Site
Lower Suwannee National Wildlife Refuge

Issued by
Friends of the Lower Suwannee and Cedar Keys National Wildlife Refuges, Inc.

Issued on
August 1, 2019

PROPOSALS MUST BE DELIVERED ELECTRONICALLY
August 30, 2019 by 5:00 pm

To
Dr. Belinda B. Nettles
Grant Manager
bbnettles@ufl.edu or via DropBox

All questions concerning this Request for Proposals shall be submitted in writing to
bbnettles@ufl.edu no later than August 28, 2019 by 5:00 pm

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A. GENERAL INFORMATION

1. PURPOSE OF RFP

The Friends of the Lower Suwannee and Cedar Keys National Wildlife Refuges, Inc. (Friends) are requesting proposals from a duly licensed and qualified consultant or consulting team to perform a historic structures assessment and produce a Historic Structure Assessment Report (HSAR) for the Vista site located within the Lower Suwannee National Wildlife Refuge near Fowler's Bluff, Florida. The consultant or members of the consulting team shall meet the Secretary of the Interior's "Professional Qualifications Standards" (36 CFR Appendix A to Part 61) for Architectural History and Historic Architecture and shall be capable of conducting a historic structures assessment that meets the approval of the Florida Department of State Division of Historical Resources (DHR).

It is the Friends' desire to utilize the Vista site for visitor contact and interpretation. The purpose of the project is to provide a foundation of documentation and information about Vista. The Friends will use the HSAR as a comprehensive planning tool for the maintenance, stabilization, preservation, and future rehabilitation of the structures on the Vista site.

2. BACKGROUND

The Friends are receiving a planning grant from the Florida Department of State Division of Historical Resources to conduct a historic structures assessment and produce a Historic Structure Assessment Report for the Vista Historic Site.

Vista is a 14-acre (+/-) site located within the Lower Suwannee National Wildlife Refuge near Fowler's Bluff, Florida. The site has eleven (11) structures, which include: two (2) houses, two (2) garages, a boat house, a houseboat, a dock, an outdoor brick grill/oven, two (2) small storage structures, and an outbuilding. The site also contains the foundation of a large dog kennel and a marine railway.

The Vista site is historically associated with the timber industry and the site served as a regional headquarters and corporate retreat (hunting and fishing) for Cummer Cypress Company. The structures with known histories date to the mid-1930s and 1940s.

The Cummer heirs donated the Vista property to the U.S. Fish and Wildlife Service to be managed as part of the Lower Suwannee National Wildlife Refuge. The site is subject to a life estate, and it is still in the possession of the heirs. All access to the Vista site must be scheduled by the Grant Manager or a designated representative of the Friends.

3. PROCUREMENT SCHEDULE

The projected schedule for selecting a consultant or consulting team for this project is as follows:

Issue Request for Proposals: August 1, 2019

Pre-Proposal Site Visit (optional): August 9, 2019 at 10:00 am

Pre-Proposal Site Visit (optional): August 19, 2019 at 10:00 am

Questions Accepted Until: August 28, 2019 at 5:00 pm

RFP Proposals Due: August 30, 2019 at 5:00 pm
 Initial Review of RFP Proposals Completed: September 11, 2019
 Finalists Notified: September 11, 2019
 Finalist Interviews: September 18, 2019
 Consultant Selected: September 18, 2019

4. PRE-PROPOSAL SITE VISITS

Attendance at one (1) of the two (2) Pre-Proposal Site Visits is optional.

Firms that intend to attend one of the pre-proposal site visits must notify the Grant Manager, Dr. Belinda B. Nettles, through email (bbnettles@ufl.edu) by the date and time indicated in the table below. The email subject line shall state "VISTA PRE-PROPOSAL VISIT." The firm's intent to attend the pre-proposal site visit should include the number of people attending along with the name, address, telephone, and email address for the firm's contact person.

The site visits will take approximately one (1) hour.

Pre-Proposal Site Visits		
Date	Location	RSVP
Friday, August 9, 2019 10:00 am	Meet at the Bat House near the Refuge Headquarters 16450 NW 31 Place, Chiefland, FL	RSVP by Wednesday, August 7, 2019 at 12:00 pm to bbnettles@ufl.edu
Monday, August 19, 2019 10:00 am	Meet at the Bat House near the Refuge Headquarters 16450 NW 31 Place, Chiefland, FL	RSVP by Thursday, August 15, 2019 at 12:00 pm to bbnettles@ufl.edu

5. PRE-PROPOSAL QUESTIONS and RFP UPDATES

Questions can be emailed to Dr. Belinda B. Nettles, Grant Manager, at bbnettles@ufl.edu until Wednesday, August 28, 2019 at 5:00 pm.

To receive answers to all questions and any other RFP updates, send an email with the subject line "VISTA RFP UPDATES" to bbnettles@ufl.edu. Answers will be periodically emailed throughout the proposal period as needed. The final answers will be emailed no later than Thursday, August 29, 2019 at 12:00 pm.

6. PROPOSAL DEADLINE AND SUBMITTAL REQUIREMENTS

One (1) electronic copy of the proposal must be received by 5:00 pm on August 30, 2019. Proposals received after the time and date specified will not be considered. Direct submittals to: Dr. Belinda B. Nettles, Grant Manager at bbnettles@ufl.edu. DropBox submittals are also acceptable. Subject line shall state "PROPOSAL FOR VISTA HISTORIC STRUCTURE ASSESSMENT."

7. PROFESSIONAL QUALIFICATIONS AND STANDARDS

Project team members must meet the Secretary of the Interior's "Professional Qualifications Standards." This project shall be based on the following standards and recommended approaches:

- a) The Secretary of the Interior's Standards for the Treatment of Historic Properties
- b) The Preparation and Use of Historic Structures Reports, Preservation Brief 43
- c) The Secretary of the Interior's Standards and Guidelines for Architectural and Engineering Documents
- d) The Florida Department of State Division of Historical Resources Guidelines for Submitting Photographic Documentation
(<https://dos.myflorida.com/media/696157/photo-guidelines.pdf>)

8. OTHER REQUIREMENTS

This project is funded by an award from the Florida Department of State Division of Historical Resources Small Matching Grant Program. The project number is 20.h.sm.100.162.

- a) All project work and expenditures must comply with Florida Department of State Division of Historical Resources' standards outlined online at <https://dos.myflorida.com/historical/grants/small-matching-grants/>
- b) The project work must be the original work of the consultant. If the work of others is used as background information, it shall be appropriately credited to the originator.
- c) The consultant shall comply with federal Equal Employment Opportunity legislation.
- d) The consultant shall retain all project records until July 31, 2025 and provide access to such records to the Grant Manager, the Friends, and the Division of Historical Resources.
- e) The contract will include an outline of the scope of work as identified in the Grant Award Agreement.
- f) The contract will specify a project duration.
- g) The contract will include provisions for contract termination.
- h) The contract must be approved by the Florida Department of State Division of Historical Resources prior to execution.
- i) The Historic Structure Assessment Report shall include a credit line acknowledging grant funding.

9. INSURANCE

The consultant shall procure, maintain, and provide proof of insurance. Proof of coverage shall be submitted no later than ten (10) days prior to the commencement of services and such coverage shall remain in force for the duration of the contract period for occurrence policies. Claims made policies must be in force for three (3) years after the contract completion date.

- a) Commercial General Liability (Occurrence Form): Coverage shall be as broad as Comprehensive General Liability with a Broad Form endorsement or Commercial General Liability Insurance including Products/Completed Operations.

\$1,000,000 per occurrence combined single limit for bodily injury liability and property damage liability and minimum limits of \$2,000,000 per aggregate.

- b) Commercial Automobile Liability: Coverage sufficient to cover all vehicles owned, used, or hired by the consultant, his agents, representatives, employees, or sub-consultants.

	Statutory Limits
Automobile Liability	
Combined Single Limit per accident	\$300,000
Bodily Injury per person	\$300,000
Property Damage per accident	\$100,000

- c) Umbrella Liability

	Statutory Limits
Aggregate per job	\$2,000,000

- d) Professional Liability (errors and omissions): The consultant and any sub-consultants shall maintain a professional liability insurance policy in the amount of \$1,000,000 during the term of this agreement. Such coverage shall be maintained for a period of three (3) years following completion and acceptance of any work performed under this agreement.

- e) The consultant will name the following entities on its Commercial General Liability, Business Automotive Liability, and Umbrella Liability as additional insureds:
- Friends of the Lower Suwannee and Cedar Keys National Wildlife Refuges, Inc.
 - Lower Suwannee National Wildlife Refuge (Refuge)
 - Board Members, Employees, Agents, or Volunteers of the Above Entities (Including the Grant Manager)
 - Occupants of Vista Property

Such policies will be endorsed to provide primary and non-contributory coverage to the Additional Insured in relation to any and all other liability insurance policies carried for the benefit of the Additional Insureds.

- f) The Friends, Refuge, or occupants for Vista shall not be responsible for, nor shall they insure, the personal property of the consultant and/or sub-consultants including, but not limited to, tools and equipment located at the job site.
- g) The consultant shall purchase and maintain such insurance with insurance companies acceptable to the owner. The insurance companies must maintain a minimum A.M. Best Insurance rating of A-VII.

h) Workers' Compensation

	Statutory Limits
Employee Liability per occurrence	\$1,000,000

Employers' liability insurance which covers the statutory obligation for all persons engaged in the performance of the work required hereunder with limits not less than \$1,000,000 per occurrence. Evidence of qualified self-insurance status will suffice for this subsection. The proposer understands and acknowledges that it shall be solely responsible for any and all medical and liability costs associated with an injury to itself and/or employees, sub-consultants, volunteers, and the like, including the costs to defend the Friends, the Refuge, and the Vista Occupants in the event of litigation. The consultant and sub-consultants must provide a waiver of subrogation endorsement in favor of the Friends, the Refuge, and the Vista Occupants.

Coverage Provisions

- i.* All deductibles or self-insured retention shall appear on the certificate(s).
- ii.* The board members, employees, agents, or volunteers of the Friends of the Lower Suwannee and Cedar Keys National Wildlife Refuges, Inc., the Lower Suwannee National Wildlife Refuge, and the Vista Occupants shall be added as "additional insured" as their interests may appear. This provision does not apply to Professional Liability or Workers' Compensation/Employers' Liability.
- iii.* The consultant's insurance shall be primary over any applicable insurance or self-insurance maintained by the Friends, Refuge, or Vista occupants.
- iv.* The consultant shall provide 30 days written notice to the Friends before any cancellation, suspension, or void of coverage in whole or part, where such provision is reasonable.
- v.* All coverages for the sub-consultants shall be subject to all the requirements stated herein.
- vi.* All deductibles or self-insured retention shall appear on the certificate(s) and shall be subject to approval by the Friends. At the option of the Friends, either; the insurer shall reduce or eliminate such deductible or self-insured retention, or the consultant shall be required to procure a bond guarantee payment of losses and related claims expenses.
- vii.* Failure to comply with any reporting provisions of the policy(s) shall not affect coverage provided the Friends, the Refuge, the Vista occupants, or their board members, employees, agents, or volunteers.
- viii.* The insurer shall agree to waive all rights of subrogation against the Friends, Refuge, Vista occupants, and their board members, employees, agents, and volunteers for any act, omission or condition of premises which the parties may be held liable for reason of negligence.
- ix.* The consultant shall furnish the Friends certificates of insurance including endorsements affecting coverage. The certificates are to be signed by a person authorized by the insurance company(s) to bind coverage on its' behalf, if executed

by a broker, a notarized copy or authorization to bind, or certify coverage must be attached.

- x. All insurance must be placed with insurers maintaining an A.M. Best rating of no less than an A:VII.
- xi. Consultant agrees to the extent it engages any sub-consultant to perform work at the project, it shall require all sub-consultants to maintain the same insurance as outlines in sections a – h above and provide certificates of insurance for each sub-consultant as provided above.

10. COMPENSATION

Payments will be made in the fixed amount price of twenty-five percent (25%) of the total amount in accordance with completion of the deliverables.

11. INITIAL MEETING AND TOUR OF VISTA

The selected consultant or members of the consulting team will have an initial project kick-off meeting with members of the Friends' Board and members of the grant project management team at the Lower Suwannee National Wildlife Refuge to discuss preliminary objectives, approaches, timelines, and potential sources of information. The selected consultant and members of the consulting team will also tour Vista.

12. MEETINGS

The consultant or a designated member of the consulting team will meet frequently and maintain close communication with the Friend's Grant Manager to assure timely progression and completion of the project objectives.

13. ACCESS TO THE VISTA SITE

The consultant and member of the consulting team shall not access nor permit access to the Vista site without prior approval from the Grant Manager or designated representatives of the Friends.

14. INSPECTION AND WORK PERFORMANCE

Failure to perform to the requirements specified herein in an effective and timely manner will be unacceptable, and upon notice, the consultant will implement corrective measures.

The Grant Manager has the authority to point out incomplete or defective work but does not have the authority to alter the scope of work or terms of the agreement without approval from the Friends and/or the Florida Department of State Division of Historical Resources.

The consultant shall provide adequate supervision of all personnel to ensure satisfactory performance of all work in accordance with the Scope of the Project.

B. GENERAL SCOPE OF PROJECT

1. GENERAL ELEMENTS

The contractor will conduct historical research and perform a structural assessment of Vista for the purpose of developing a Historic Structure Assessment Report. The projected project start date is October 1, 2019 (subject to contract approval by the Florida Department of State Division of Historical Resources). All project work must be completed prior to June 30, 2020. The report consists of the following:

- a) Project Overview (Chapter 1)
 - i) Purpose
 - ii) Project Background
 - iii) Scope and Objectives
 - iv) Methodology
 - v) Project Participants
 - vi) References
- b) Physical Description, History, & Context (Chapter 2)
 - i) Historical Background & Context developed through archival research and interviews
 - ii) Physical Description of Vista
 - iii) Building Chronology
 - iv) Evaluation of Significance
 - v) Character-defining Features (Exterior & Interior)
 - vi) Measured drawings of the structures
 - vii) Photo documentation of the structures and existing conditions
- c) Standards, Guidelines and Definitions (Chapter 3)
 - i) Description of the standards, guidelines, and definitions for preservation & rehabilitation
 - ii) Condition Assessment Standard Definitions
- d) Conditions Assessment Survey (Chapter 4)
 - i) Site Visit
 - ii) Summary of Condition Findings
 - iii) Summary of Condition Assessment Ratings
 - iv) Buildings Feature Master List
 - v) Condition Assessment Reports
 - vi) Summary of Condition Assessment Ratings (Table)
- e) Recommended Treatments (Chapter 5)
 - i) Necessary Stabilization
 - ii) Prioritized Stabilization Treatment List
 - iii) General Building Security
 - iv) Hazardous Materials
 - v) Necessary Preservation Treatments
 - vi) Prioritized Preservation Treatment List
 - vii) Necessary Rehabilitation Treatments
 - viii) Prioritized Rehabilitation Treatment List
 - ix) Maintenance Schedule
 - x) Cost Estimate for All Recommended Treatments

2. PROJECT TIMELINE

The project is projected to begin on October 1, 2019 (subject to contract approval by the Florida Department of State Division of Historical Resources).

All work on the project **must** be completed before June 30, 2020.

The project has a set timeline for deliverables, outlined below in the Deliverables section, to enable the Friends to meet the Progress Report deadlines set by the Florida Department of State Division of Historical Resources.

3. DELIVERABLES

- a) One (1) electronic draft copy of Chapter 2 (Physical Description, Context & Chronology) including measured drawings and photo-documentation to be submitted for review by January 10, 2020.
- b) One (1) electronic draft copy of Chapters 3 & 4 (Standards, Guidelines and Definitions & Conditions Assessment Survey, including the Conditions Assessment Report & Buildings Feature Master List to be submitted for review by March 13, 2020.
- c) One (1) electronic draft copy of the entire report (Chapters 1-5 with References, Bibliography, and Appendices) to be submitted for review by May 1, 2020.
- d) One (1) electronic copy and one (1) printed, bound, full-color copy of the final Historic Structure Needs Assessment Report submitted by June 15, 2020.

C. PROPOSAL REQUIREMENTS

The selected consultant or consulting team shall be able to be properly licensed to conduct business in the State of Florida, with all licenses, permits, and certificates as required by all local, State of Florida, and Federal agencies. The consultant or members of the consulting team shall also meet the Secretary of the Interior's "Professional Qualifications Standards" (36 CFR Appendix A to Part 61) for Historic Architecture and Architectural History. The consultant or consulting team should have professional experience in completing historic structures reports or related reports. Materials testing including paint, wood, and mortar analysis may be required.

All proposals shall include the following information. Any proposal that does not include all of the items listed below will be excluded from consideration. Proposals shall be PDFs of 8.5" x 11" documents. In order to maintain comparability and enhance the review process, the proposals must be organized in the following format with a section for each item below.

1. TITLE PAGE

Include the firm name, address, primary contact person, and contact's phone number and email.

2. LETTER OF TRANSMITTAL

- a) Provide a statement indicating the firm's understanding of the project's objectives, scope, and requirements.
- b) Give the name of the individual authorized to submit the proposal and the names of the person(s) who will be authorized to make presentations for the firm. Include their titles, addresses, telephone numbers, and email.

3. INTRODUCTION

Provide a synopsis of the firm's background, history, and services provided (including areas of expertise).

4. SUMMARY OF ORGANIZATION'S QUALIFICATIONS

Discuss the firm's experience performing structural assessments of historic structures. Provide details of a minimum three (3)/maximum five (5) engagements with similar scope of services described within this RFP. For each engagement, include project details, contract duration, owner, and contact information.

5. PROJECT TEAM AND STAFF QUALIFICATIONS

a) Organizational Chart

Provide an organizational chart and staffing plan with the name and role of each team member who will perform work on this project, including any sub-consultants.

b) Staff Qualifications

Provide details of prior or current engagements that document the qualifications and experience for each team member who will perform work on this project.

c) Resumes

Provide a resume for each team member who will perform work on this project

6. PROJECT APPROACH

Provide a detailed description of the proposed methodologies, techniques, and procedures to be used in carrying out the components described above in the "General Scope of Project" section of this RFP. Specifically note any suggested additions or deletions to the requested scope. Identify assigned team members and meetings with Friends/Grant Manager. Include a timeline that specifies the projected delivery date for each of the project deliverables, and a projected final completion date. Note that all work must be completed prior to June 30, 2020. This project also has deliverable deadlines (specified above).

7. COMPENSATION

Provide pricing outlined in the Price Schedule (pg. 12 of this RFP).

The Friends of the Lower Suwannee and Cedar Keys National Wildlife Refuges, Inc. reserve the right to make any changes to this RFP, or to reject any and all proposals, or parts of any and all proposals, or to accept any proposal or portion thereof deemed to be in the best interest of the Friends, or to postpone or cancel this RFP, at any time, or to re-solicit this RFP, or to waive any

irregularities in this RFP or in the offers received as a result of this RFP. The Friends also reserve the right to request clarification or information from any firm that submitted a proposal. The Friends are not liable for any expenses incurred by any firm as a result of being a respondent to this solicitation.

The Friends reserve the right to award all or part of the services described in this RFP.

D. BASIS OF SELECTION

An evaluation committee comprised of Board Members of the Friends will conduct the evaluation of proposals. The evaluation committee evaluates the submittals against the established evaluation criteria stated in this section. The scores of the committee members will be added to determine the best overall proposal. Following their review of the proposals received, oral interviews of the finalists may be requested to further expand on a firm’s qualifications and approach for this project. The scores of the committee members will be added to determine a ranking of each firm.

The following criteria will be used to evaluate the submittals:

1. Organization Experience 20 Points
Proposal description demonstrating the firm’s experience performing work similar to the scope described in this RFP.

2. Staff Qualifications and Experience 20 Points
Staff qualifications and experience performing work similar to the scope described in this RFP.

3. Project Approach 30 Points
Proposal description outlining the proposed approach of how the firm intends to provide the services required by this RFP and the proposed timeline.

4. Compensation 30 Points
Compensation indicated in the Price Schedule (pg. 12 of this RFP)

PRICE SCHEDULE
Historic Structure Assessment

The below signed agrees to furnish the proposed services under the terms contained within this RFP. I have read the RFP and fully understand what is required. By submitting this signed proposal, I will accept a contract if it is offered by the Friends and approved by the Florida Department of State Division of Historical Resources. This acceptance covers all terms and specifications of this proposal. Prices include all supervision, labor, materials, supplies, tools, equipment, and other incidentals required to perform the services as contained in the proposal.

The price for each deliverable below is twenty-five percent (25%) of the total price for the project.

DELIVERABLE	PRICE
One (1) electronic draft copy of Chapter Two (Physical Description, History, and Context) of the Historic Structure Assessment Report, including photos and measured drawings	
One (1) electronic draft copy of Chapters 3 & 4 (Standards, Guidelines, and Definitions & Conditions Assessment Survey) of the Historic Structure Assessment Report, including the conditions assessment report and the Building Features Master List	
One (1) draft copy of the entire Historic Structures Assessment Report (Chapters 1-5 with References, Bibliography, and Appendices	
One (1) electronic copy and one (1) printed, bound, full-color copy of the final Historic Structure Needs Assessment Report	
TOTAL	

For satisfactory services rendered by the consultant, the Friends will pay for the work performed at the prices stated above, provided that such services are properly invoiced by the consultant, accepted by the Friends, and meet the approval of the Florida Department of State Division of Historical Resources.

PROPOSAL INFORMATION	
COMPANY NAME AND ADDRESS	Phone: _____ Email: _____ FEIN: _____
AUTHORIZED SIGNATURE: _____ PRINTED SIGNATURE: _____ TITLE: _____	
DATE SIGNED:	DATE DUE: AUGUST 30, 2019 at 5:00 pm

“NO BID” RESPONSE TO INVITATION FOR PROPOSAL

If your firm is unable to submit a proposal at this time, please provide the information requested and return to:

Friends of the Lower Suwannee and Cedar Keys National Wildlife Refuges, Inc.
c/o Dr. Belinda B. Nettles, Grant Manager
bbnettles@ufl.edu

We have received an invitation to submit a proposal for the Historic Structure Assessment of Vista, due on August 30, 2019 at 5:00 pm. We have chosen not to bid for the following reason:

Signature: _____

Printed Name: _____

Title: _____

Company Name: _____