



Audubon

Mitchell Lake
Audubon Center

**REQUEST FOR PROPOSALS FOR
OWNER'S REPRESENTATIVE & PROJECT MANAGEMENT
SERVICES**

**For Improvements to Mitchell Lake Audubon Center
10750 Pleasanton Rd, San Antonio, TX 78221**

Issued by the National Audubon Society, Inc.

**Issued:
April 19, 2024**

**Proposals Accepted Until:
May 15 at 5:00 PM CST**

**Mitchell Lake Audubon Center
ATTN: Sara Beesley
Email: MLACProject@Audubon.org
Project Location: 10750 Pleasanton Rd, San Antonio, TX 78221**

I. BACKGROUND

On May 7, 2022 residents of San Antonio voted for an historic \$1.2 billion public bond package that includes \$6 million in infrastructure improvements for Mitchell Lake Audubon Center [MLAC], with projects being completed over a five-year period ending in 2027. The city-funded improvements will foster equitable public access to the Center; support economic development focused on conservation, tourism, and education; and create resilient infrastructure to improve operational success; while enhancing public awareness and knowledge of the area's outstanding natural, historic, and cultural resources.

Mitchell Lake Audubon Center is a unique and beautiful bird haven, consisting of the 600-acre Mitchell Lake, 300 acres of wetland and ponds, and 300 acres of grassland, brushland, and woodland habitats. Situated in San Antonio, Texas, Mitchell Lake Audubon Center is documented as an important stopover along the Central Flyway with more than 350 bird species observed.

Mitchell Lake Audubon Center serves 12,000 visitors and 4,000 students annually, with 70 percent of students served coming from Title I schools.

Mitchell Lake Audubon Center is one of the few greenspaces located in a rapidly developing and historically under resourced area on the south side of San Antonio. With potential connectivity to the Howard W. Peak Greenway Trail System, a growing network of approximately 82 miles of developed multi-use and accessible trails, Mitchell Lake Audubon Center is viewed by many in the community as the “hidden gem of San Antonio’s Southside”.

The National Audubon Society [Audubon], through its Texas State Office and Mitchell Lake Audubon Center, will manage the project in partnership with the City of San Antonio and San Antonio Water System [SAWS]. The opportunity presented by City bond funds is the first step in a larger plan and slate of opportunities to reimagine and expand the impact of Mitchell Lake Audubon Center over the next ten years.

The Project is referred to as the **Improvements to Mitchell Lake Audubon Center Project** and are anticipated to include (see Appendix A):

- Improved base at Polder drives and drives around Bird Pond (orange trail): Eighty percent of onsite driving trails are not paved. With improved bases along those roads, all-weather access will be provided for visitors, increasing the safety of the site, and allowing for an additional four miles of trail accessible to visitors in wheelchairs.
- Existing asphalt roadway improvements and control gates (blue trail): With connection to the Greenway Trail System (green trail), will provide ability to control the flow of vehicular, walking, and bicycle traffic onsite. Will prevent disturbance in ecologically sensitive areas.
- New parking at entry and improvements at existing parking (B): Existing parking will be improved to increase safety for visitors walking trails and entering the visitor center during the Center’s busiest days and events.
- Educational pavilion improvements and expansion (C): A larger second pavilion and outdoor classroom will be constructed to host special events, facility rentals, and increase the number of students safely hosted for field trips.
- Full-service restroom and parking area North of Polders (E)
- Three viewing stations along polder roads (I): Will provide viewing access, seating, and shade along the trails; will allow for premium bird viewing, as well as provide respite for visitors walking the trails.

Audubon is ready to seek public, community input and finalize plans for the above listed improvements. Audubon staff will coordinate with the MLAC Advisory Board (invited advisors) and SAWS to oversee project planning and implementation. Estimates of the total project budget

are \$6 million, inclusive of all project management fees and design and construction fees associated with the project.

Audubon issues this request for proposal (“RFP”) for a qualified firm or team (the “Consultant”) to serve as the owner’s representative and provide project management services during the design and construction of the improvement project. The successful Consultant will serve as the owner’s representative and provide project management services (the “Services”) during the design and construction of the Project. Sustainability is an important part of the design concept. Audubon seeks a Consultant that is experienced in the construction of “sustainable”, “green-building”, and “bird-friendly” design and construction projects. Project Management Contractors are requested to submit proposals for services as outlined below.

II. SCOPE OF WORK

Project Execution:

The addition of the successful Consultant as project manager (the “PM”) will complete the primary project team, consisting of the Project Owner (Audubon), Building Owner (SAWS), architect/engineer (the “A/E”), representative stakeholders and PM. The PM’s first assignment will be to draft an RFP for architect/engineer design services for the Project and manage that process in compliance with Federal Procurement and City of San Antonio Finance Construction Management Procurement & Public Works Labor Compliance guidelines. The PM will subsequently issue RFPs for Construction Services upon completion of the design services and administer that process in compliance with Federal Procurement guidelines. The PM will establish Project goals and standards to use as checkpoints for all future decisions. The PM will need to ensure all designs are in accordance with Owners’ and Tenant’s requirements and meet all Project goals and standards. The PM will be expected to manage and oversee the services and consultants necessary to coordinate the design of the Project. The PM will also be expected to develop a milestone schedule with information ascertained from the early planning phase. The variables affecting the Project include design, quality, sustainability, budget, schedule, construction phasing, staging, contractor selection, and federal and city compliance as well as seasonal restrictions due to avian migration and breeding. The successful Consultant must demonstrate the ability to accommodate the variables identified above as well as the ability to address additional variables on an as needed basis.

General Scope of Services:

The PM’s overall tasks include establishing the quality of the Project, which shall include oversight of the Design Professionals and Contractor to ensure that the Project remains on schedule, and budget. Project Owner expects the PM, at a minimum, to provide budget development advice; to assist in procurement of design professionals and contractor, attend all design and construction coordination meetings; to provide input on progress and quality; and to review the design for constructability, adherence to budget, ease of maintenance, and other criteria established at the onset of the Project. The successful Consultant will provide a dedicated principle for the point of contact and meeting representative. This individual will be the primary point of contact between the Project Owner and other Project team members.

Pursuant to this RFP, the Services shall include, and the PM shall provide, at a minimum, the following general scope of work:

1. Review the comprehensive facility improvement project and program components for the Project.
2. Organize and lead the team as Project Owner's representative.
3. Establish communication protocol for Project team.
4. Maintain the schedule and budget, exclusive of Project Owner's direction.
 - 4.1. The PM will be responsible for keeping all parties on task to achieve the desired goal as established at the onset of the Project.
 - 4.2. The PM must keep communication lines open for timely decisions and ensure Project milestones are completed.
 - 4.3. The PM must manage each stage of the Project to ensure orderly progression in accordance with the Project Owner's input and direction.
 - 4.4. The PM will not be allowed to make any decisions with monetary implications without prior written approval from Project Owner.
 - 4.5. The PM shall present any unresolved issues to the Project Owner with a recommendation of possible solutions.
5. Organize and distribute an "Open Items" list, identifying all parties involved with the Project along with all items currently required from each party. The "Open Items" list must be updated periodically, but no less than monthly.
6. Assist the Project Owner to develop a detailed program of requirements, overall budget, contract status log, milestone schedule, and party directory.
7. Develop and maintain an organization chart for the Project.

Specific Scope of Services:

1. Design & Pre-Construction Services

The PM Contractor shall be responsible for providing design and pre-construction services throughout the duration of this phase of the project. The PM shall be actively involved in all project design and pre-construction management tasks.

Design & Pre-Construction Services may include but are not limited to:

- 1.1. Develop and implement information and communication procedures for the Project.
- 1.2. Refine and finalize the scope of the project.
- 1.3. Preliminary design concept review.
- 1.4. Determine project delivery method.
- 1.5. Draft an RFP for A/E design services.
- 1.6. Manage RFP process for A/E design services.
- 1.7. Review proposed agreement between the A/E and Project Owner.
- 1.8. Review and provide recommendations on the agreement between A/E and Project Owner.
- 1.9. Lead coordination between Project Owner and A/E to ensure appropriate design is achieved and accomplishes all project and programmatic goals.
- 1.10. Review and comment on planning objectives for the Project.
- 1.11. Draft RFP(s) for Construction services for the Project.

- 1.12. Manage RFP process for Construction services.
- 1.13. Develop a contract, in conjunction with Project Owner's legal counsel, based upon the selected vendor.
- 1.14. Schedule and oversee preparation of construction drawings.
- 1.15. Schedule and budget evaluations.
- 1.16. Coordinate value engineering process with Project Owner.
- 1.17. Provide constructability reviews.
- 1.18. Provide accuracy checks on cost estimates.
- 1.19. Weigh project alternatives.
- 1.20. Assist Project Owner with contract administration.
- 1.21. Conduct the pre-construction conference.

2. Construction Services

The PM shall be responsible for providing services during construction throughout the duration of this phase of the project. The manager for the PM Contractor shall be actively involved in all construction management tasks:

2.1. Project Management, including:

- 2.1.1. Overall Schedule Preparation.
- 2.1.2. Schedule Evaluation (actual v/s planned).
- 2.1.3. Record Management.
- 2.1.4. Site Coordination between Construction Contractor(s) and Project Owner.
- 2.1.5. Cost Tracking.
- 2.1.6. Communication with Construction Contractor(s), City of San Antonio, Bexar County , all AHJs and other relevant entities.
- 2.1.7. Preparation and submittal of monthly PM Contractor progress report.
- 2.1.8. Preparation and submittal of monthly progress reports and payment requests. The monthly progress report shall be due monthly and shall contain at a minimum:
 - 2.1.8.1. Overview of work accomplished during the previous month.
 - 2.1.8.2. Overview of work to be accomplished in the following month.
 - 2.1.8.3. Updated schedule based on Construction Contractor's schedule.
 - 2.1.8.4. Construction Contractor(s) work progress and completion percentage in a summary form.
 - 2.1.8.5. Problem areas, if any, with proposed corrective actions.
 - 2.1.8.6. Outstanding issues with deadline date for resolution.

2.2. Construction Contract Administration, including:

- 2.2.1. Review of contract document development.
- 2.2.2. Participation in project meetings.
- 2.2.3. Coordination of site meetings with the Construction Contractor(s), Project Owner and PM Contractor, and preparation and distribution of meeting agenda.
- 2.2.4. Review of working days, contract duration and documenting time extensions.
- 2.2.5. Monitoring of construction schedules throughout the course of the construction

- 2.2.6. Review of Construction Contractor's contract execution for compliance with Contract Documents requirements.
- 2.2.7. Review of Construction Contractor's submittals for compliance with Contract Documents.
- 2.2.8. Review of Construction Contractor's request for information and either provide information from Contract Documents upon Project Owner approval back to the Contractor or route request to Architect for resolution.
- 2.2.9. Review of Contractor's pay requests and recommendations to Project Owner as to acceptability of request.
- 2.2.10. Communication with Construction Contractor(s) regarding acceptability of work.

2.3. Change Management, including:

- 2.3.1. Develop and implement a change control process in partnership with owner.
- 2.3.2. Review and evaluation of contract change order requests and submittals.
- 2.3.3. Contract change order coordination between Construction Contractor(s), and Project Owner.
- 2.3.4. Investigation and inspection of site conditions that differ from those described in the Contract Documents.
- 2.3.5. Review of submittals in support, and recommendations for resolution of claims and disputes.

2.4. Field Inspection, including:

- 2.4.1. Performing visual field inspection.
- 2.4.2. Review and inspection of Construction Contractor's work for compliance with Contract.
- 2.4.3. Monitoring of corrective actions taken by the Construction Contractor(s) needed to fix work that is not in compliance with Contract Documents.
- 2.4.4. Ensuring Contractor(s) properly provides for the safety of the Project Owner staff and visitors to the site during construction.

3. Construction Close-Out Services

The PM Contractor shall be responsible for providing services during the construction close-out phase of the project. The Project Manager shall be actively involved in all construction close-out management tasks.

Services during construction close-out shall include, but not be limited to:

3.1. Substantial and Final Completion services, including:

- 3.1.1. Site inspection to determine if facilities are complete and in compliance with Contract Documents.

- 3.1.2. Review punch-list(s) prepared by Construction Contractor(s), monitor the timely completion of list items, and confirm that all items on the list(s) have been completed.
- 3.1.3. Recommendation to Project Owner on release of payments to or retention from Construction Contractor(s).
- 3.2. Review of O&M Manuals submitted by Construction Contractor(s) and reviewed by Architect
- 3.3. Record Compilation and Submittal, including:
 - 3.3.1. Preparation and submittal of a complete set of organized construction contract documentation.
 - 3.3.2. Submittal of any record drawings made by Project Manager(s) during construction.
- 3.4. Obtaining Warranty and Lien Release Information from Construction Contractor(s).
- 3.5. Final project walk-through.
- 3.6. Confirmation of permit sign off and receipt of Certificate of Compliance and Certificate of Occupancy.

Services Overview

The following shall be considered, at a minimum, in the scope of work:

1. Assess the proposed construction/improvement project, programming solutions and design concept. Refine the scope of the project and develop a preliminary design and construction budget and schedule. Determine the project delivery method and assist in the A/E selection process.
2. Project Manager will arrange and conduct kick-off meeting with all parties involved. This meeting will allow for introduction of project team, discussion of proposed scope of work, and discussion of project schedule.
3. Conduct and attend project progress meetings with Project Owner staff and invited advisors on a weekly or as-needed basis during the construction phase of the project.
4. Project specific status update via a monthly electronic communication or other appropriate outreach method shall be required.
5. Construction phasing and coordination with Project Owner will be required.
6. Based on the scope of work, review, provide recommendation, and work with Project Owner on Construction Contractor's Schedule.

III. SCHEDULE

The proposed phase schedule for RFP award is as follows:

Audubon Releases RFP: Friday, April 19, 2024

Informational Meeting: Tuesday, April 30, 2024 at 10:00 AM CST

Proposals Due: Wednesday, May 15 at 5:00 PM CST

Respondent Interviews: May 20 – 30, 2024

Audubon Awards RFP: June 12, 2024

IV. PROPOSAL REQUIREMENTS

Proposals shall include the information listed below. The information requested must be included in the text of proposal and be presented in the order indicated. Additional information such as exhibits may be attached. Audubon makes no assurances that any information or exhibits will be returned.

The written proposal shall include the following six sections in the order specified here and separated by tabs:

- 1. Proposer Information** (not to exceed 2 pages)
 - a. Name of Organization and principal contact person, including office location, address, telephone number, fax number and e-mail address.
 - b. Brief description and history of the firm.
- 2. Proposed Approach** (not to exceed 4 pages)
 - a. A statement of your proposed approach to the project Scope of Work.
 - b. Description of the services and activities as they relate to the proposed scope of service that your firm proposes to provide to Audubon for this project.
 - c. Description of your firm's experience (and the experience of any sub-contractors), if any, with providing similar services for nonprofit organizations and also with demonstrated experience with sustainable, green-building, and/or bird-friendly design and construction projects.
 - d. Describe your experience working with A/E firms and Contractors and your method to keep Projects on budget and schedule. Provide at least one example of a Project that came in over budget and your role in getting it back on track.
 - e. Description of your firm's commitment to principles of [Equity, Diversity, Inclusion, and Belonging](#).
- 3. Project Team**
 - a. Organizational chart (1 page)
 - b. Brief resumes of each key team member (1 page for each resume) tenure with your company, current role and years in current role, and their proposed role on this Project; please include descriptions of any LEED and USGBC certified professionals on the project team.
- 4. Fee Estimate** (not to exceed 3 pages)
 - a. Outline your proposed pricing structure or cost proposal.
 - b. Provide hours and cost associated with each task for each member of the proposed team.
 - c. Provide your standard hourly fees by job classification and billing criteria for providing the services described in the RFP.
 - d. Please include a description of any discount offered to Audubon clients and an outline of any other fees or charges.
- 5. Exhibits:**

- a. Listings of your firm and its principals' experience, along with this same information on any subcontractors.
- b. Professional References: Please provide 3 references of clients your firm or its principals have provided services for within the past five years for a similar scope of work. Include the name of the firm as well as the specific individual to be contacted.
- c. Include example certificates of insurance and statement of ability to provide required insurance upon execution of contract, if hired. Please see "Insurance Requirements" in Appendix B for details.

6. Conflict of Interest:

- a. Submit a statement describing any potential conflict of interest or appearance of impropriety, relating to other clients of the firm, or officers, directors, and employees of Audubon, SAWS, or City of San Antonio, that could be created by providing services to Audubon. Indicate what procedures will be followed to detect and notify Audubon and to resolve any conflicts of interest. Indicate any pending litigation and/or regulatory actions by any oversight body or entity that could have an adverse material impact on the firm's ability to fulfill the proposed scope of work from Audubon.

V. PROCEDURES FOR SUBMISSION

Interested firms are invited to **electronically submit** their proposal no later than WEDNESDAY, MAY 15, 2024 at 5:00pm.

ATTN: Sara Beesley

Email: MLACProject@Audubon.org

Project Location: 10750 Pleasanton Rd, San Antonio, TX 78221

Submissions will not be accepted after the deadline. Submissions transmitted via regular mail will not be accepted. If you have any questions regarding the RFP, please contact: MLACProject@audubon.org. A site visit and informational meeting for interested parties will be held on Tuesday, April 30, 2024 at 10:00 AM CST.

VI. REVIEW AND SELECTION PROCESS

Audubon staff and partners will evaluate the materials provided in response to the Request for Proposals based on the following criteria:

1. Audubon highly encourages applications from small, minority and woman-owned business (SMWB) firms. The Property Owner's [Good Faith Effort Plan](#) should be submitted as part of the bid package to report all small, minority, and woman-owned firm participation for this project.

2. Understanding of the scope of work and Audubon's overall project goals and respondent's strategy for carrying out the required work tasks to meet the project goals.
3. Past experience and performance of the project team on similar projects related to cost control, quality of work, meeting schedules and working on solar building projects.
4. The respondent's experience and ability to handle owner relations and communications issues relative to all phases of the project design.
5. The present workload of the respondent (and any subcontractors), availability of staff and ability to meet the project task schedule.
6. Familiarity with local rules, applicable practices and procedures for the type of work involved.
7. Conformance to the specified RFP suggested format, length and requirements.
8. Organization, presentation and content of proposal.
9. Specialized experience and technical competence of the firm and subcontractors (including individuals in the firm assigned to the project), considering the types of services required and the complexity of the project.
10. Record of performance, including results of reference checks.
11. Proposals will be ranked on the basis of qualifications.

Audubon reserves the right to conduct independent reviews and interview firms submitting proposals prior to making any selection. The top three proposers will be requested to participate in an in-person interview. At a minimum, the proposed Project Manager along with key team members shall appear at the interview. If your firm is selected to participate in an oral interview, you will be notified the week prior to the scheduled interview. Audubon will not be liable for any costs associated with your firm preparing its response to this RFP.

No proposer will be allowed to modify the content of a proposal at any time after the submission deadline, except in direct response to a request from Audubon for clarification or for an oral interview, provided that no such modification will result in a substantive amendment to the proposal.

VII. ACCEPTANCE OR REJECTION OF PROPOSAL

Audubon reserves the right to accept or reject any or all proposals received as a result of this request. Audubon also reserves the right to waive any informality, technical defect or clerical error or irregularity in any proposal. Additionally, Audubon may, for any reason, decide not to award an agreement as a result of this RFP. Audubon reserves the right to cancel this RFP and shall not be obligated to respond to any proposal submitted, nor be legally bound in any manner

by the submission of the proposal. Audubon staff and the Mitchell Lake Advisory Board will determine the selection of Project Manager based upon an evaluation of the proposals. Audubon reserves the right to negotiate project deliverables and associated costs.

VIII. GENERAL DESCRIPTION OF PROPOSED AGREEMENT

Upon conclusion of the RFP process, Audubon will recommend a firm to enter into negotiations for the assignments described herein. The recommended Project Management Contractor shall enter into contract negotiations with Audubon in substantial conformity with this proposal outline.

IX. INSURANCE REQUIREMENTS

The selected PM Contractor, at contractor's sole cost and expense and for the full term of the Agreement or any extension thereof, shall obtain and maintain at least all of the insurance requirements outlined in this proposal, included as Appendix B.

All policies, endorsements, certificates, and/or binders shall be subject to approval by Audubon as to form and content. The selected PM Contractor agrees to provide Audubon with a copy of said policies, certificates and/or endorsements.

The selected PM Contractor shall satisfy these insurance requirements prior to approval of the Agreement. Please address any issues with respect to insurance requirements in your response to the proposal.

X. EXAMINATION OF PROPOSED MATERIAL

The submission of a proposal shall be deemed a representation and certification by the responding Contractor that they have investigated all aspects of the RFP, that they are aware of the applicable facts pertaining to the RFP process, its procedures and requirements, and that they have read and understood the RFP. No request for modification of the statement shall be considered after its submission on grounds that the respondent was not fully informed as to any facts or condition.

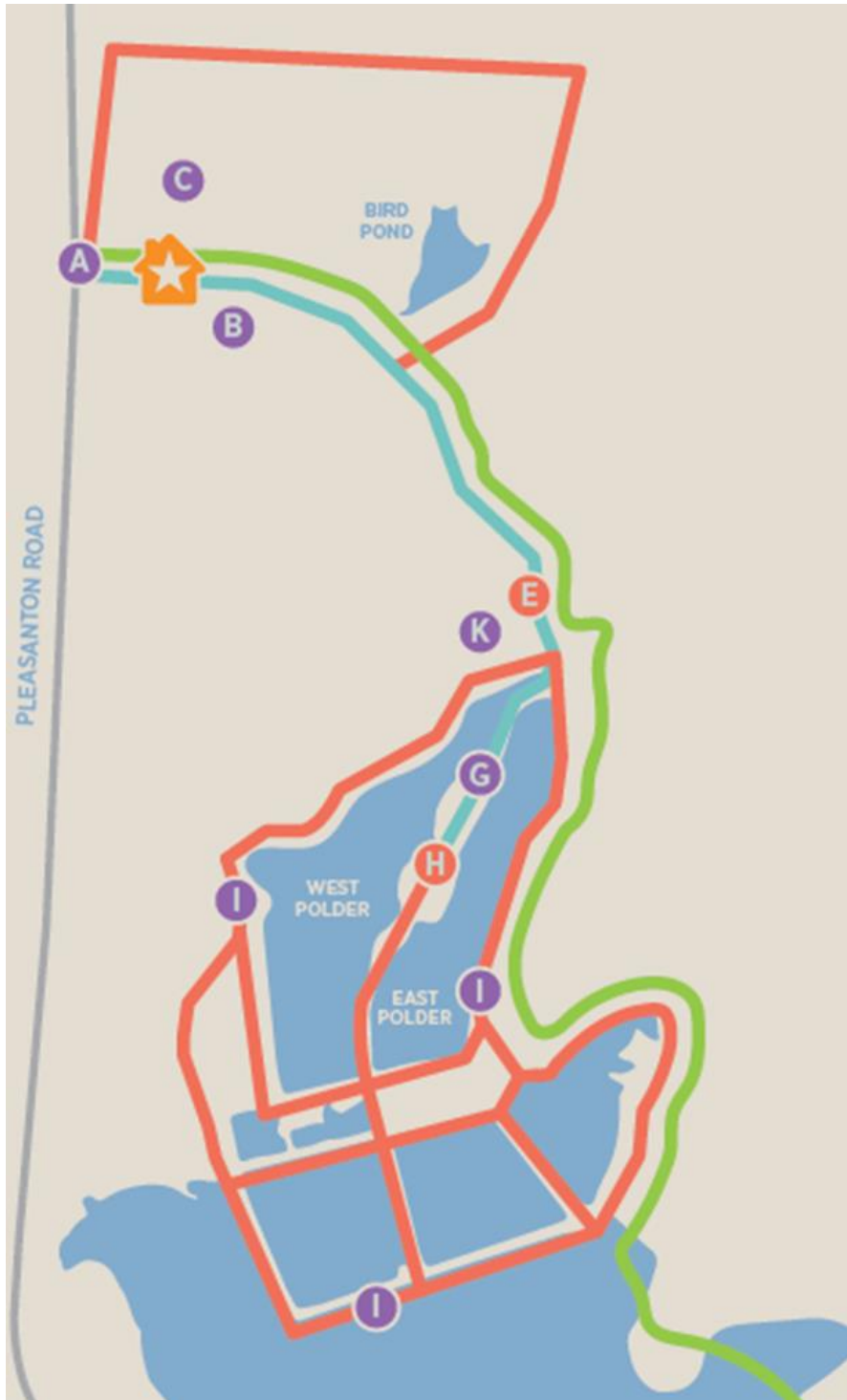
XI. ADDITIONAL TERMS AND CONDITIONS

1. It is anticipated that the award of the Agreement resulting from the RFP shall include terms and conditions similar to those referenced in this RFP. Exceptions proposed by the PM Contractor, if any, should be included in the proposal. Audubon reserves the right to consider any proposal exceptions during its evaluation of the acceptability of a proposal.
2. This RFP does not commit Audubon to pay any costs incurred in the submission of the proposal or in making any necessary studies or analysis in preparation of submission of the proposal.
3. Audubon reserves the right to modify or re-issue the RFP.

4. Audubon reserves the right to verify any information provided during the RFP process. Audubon may contact references listed or any other person known to have contracted with Respondent.

Appendix A. Map of Mitchell Lake Audubon Center.

Letters coincide with listed improvements on page 2 of this document. These locations are suggested and approximate and may not reflect current conditions.



Appendix B: Owner's Rep Insurance Requirements

As applicable, contractor must have policies endorsed to name as Additional Insureds: City of San Antonio, San Antonio Water System, and National Audubon Society, Inc.

<u>TYPE</u>	<u>AMOUNTS</u>
1. Workers' Compensation	Statutory
2. Employers' Liability	\$1,000,000/\$1,000,000/\$1,000,000
3. Broad form Commercial General Liability Insurance to include coverage for the following: a. Premises/Operations *b. Independent Contractors c. Products/Completed Operations d. Personal/Advertising Injury e. Contractual Liability f. Explosion, Collapse, Underground Property Hazard Liability g. Damage to property rented by Grantee	For <u>Bodily Injury</u> and <u>Property Damage</u> of \$1,000,000 per occurrence; \$2,000,000 General Aggregate, or its equivalent in Umbrella or Excess Liability Coverage h. \$300,000
4. Business Automobile Liability a. Owned/leased vehicles b. Non-owned vehicles c. Hired Vehicles	<u>Combined Single Limit</u> for <u>Bodily Injury</u> and <u>Property Damage</u> of \$1,000,000 per occurrence
7. Umbrella or Excess Liability Coverage	\$2,000,000 per occurrence combined limit Bodily Injury (including death) and Property Damage. (per occurrence limit depends on scope of operation)
8. Professional Liability (Claims-made Coverage)	\$1,000,000 per claim damages by reason of any act, malpractice, error, or omission in the professional service. Coverage to be maintained and in effect for no less than two years subsequent to the completion of the professional service.
*if applicable	