



City of Montrose
Purchasing Division
433 South First Street
PO Box 790
Montrose, CO 81402

REQUEST FOR PROPOSAL

Certified Local Government - Survey Plan

Issue Date: Wednesday July 24, 2019
Bid Number: 19-030
Agent/Contact: Kendall Cramer
Submissions Must Be Received By: Thursday August 8, 2019 at 2:00pm Colorado Time

Administrative Instructions:

The City of Montrose is requesting formal bids through the Request for Proposal process from historic preservation consultants for the preparation of a city-wide historic resources survey plan. Questions are due in by 5:00 p.m. on August 1, 2019. Proposals will be publicly received and registered on August 8, 2019 at 2:00 p.m at Montrose City Hall, 433 S. 1st Street, Montrose, Colorado 81401. Bids will be received no later than 2:00 P.M. on the above date.

Complete bid packets can be downloaded from the City web page at www.cityofmontrose.org under Department Services, Purchasing, and Open Bids. Addenda will be posted to the website and it is the bidder's responsibility to download addenda.

The City reserves the right to accept or reject any or all bids, to waive irregularities and/or informalities and to disregard all non-conforming, non-responsive, unbalanced or conditional bids. The City of Montrose complies with all Equal Opportunity requirements. All qualified Offerors will receive consideration without regard to race, creed, color, national origin, sex, marital status, religion, ancestry, mental or physical handicap or age.

GENERAL TERMS AND CONDITIONS

These General Terms and Conditions apply to all Offers made to the City of Montrose (hereafter "City") by all prospective vendors (herein after referred to as "Bidder") regarding City Solicitations including, but not limited to, Invitations to Bid, Requests For Proposals, Requests for Quotes, and Requests For Qualifications (hereafter "Solicitation" or Bid Solicitation.).

A. CONTENTS OF BID

- 1) Bidders shall thoroughly read the project requirements and specifications, and shall examine any drawings, which may be incorporated into the Bid documents. As Bid documents frequently change for each Solicitation, veteran Bidders shall not assume that this Solicitation contains the same terms and conditions that were supplied in prior Solicitations. The City is not obligated to identify either minimal or substantial modifications to Bid documents.
- 2) Bidders shall make all investigations necessary to thoroughly inform themselves regarding the plant and facilities affected by the delivery of services, materials and equipment as required by the Bid conditions. No plea of ignorance by the Bidder of conditions that exist, or may hereafter exist as a result of failure to fulfill the requirements of the contract documents, will be accepted as the basis for varying the requirements of the City or the compensation to the Bidder.
- 3) Bidders are advised that all City contracts are subject to all legal requirements contained in City Ordinances and State and Federal Statutes governing purchasing activities.
- 4) Bidders are required to state the exact intentions of their offer to the City via this Solicitation and must indicate any variances to the terms, conditions, and specifications of this Solicitation, no matter how slight. If variations are not stated in the Bidder's Offer, it shall be construed that the Bidder's Offer fully complies with all conditions identified in this Solicitation.

B. CLARIFICATION AND MODIFICATION OF BID SOLICITATION

- 1) Apparent silence or omissions within this Bid Solicitation regarding a detailed description of the materials and services to be provided shall be interpreted to mean that only the best commercial practices are to prevail and that only materials and workmanship of first quality are to be used.
- 2) If any Bidder contemplating submitting a Proposal under this Solicitation is in doubt as to the true meaning of the specifications, the Bidder must submit a written (fax or e-mail) request for clarification to the City's Agent/Contact. The Bidder submitting the request will be responsible for ensuring that the City receives the request at least seven (7) calendar days prior to the scheduled bid opening.
- 3) Any official interpretation of the Bid Solicitation must be issued in writing by the agent/contact of the City who is authorized to act on behalf of the City, or by the City's Legal Department. The City shall not be responsible for other interpretations offered by employees of the City who are not authorized to act on behalf of the City for this project.
- 4) If necessary, the City may issue a written addendum to clarify or inform of substantial changes which impact the technical submission of Bids. Addenda will be posted to the website and it is the Bidder's responsibility to download addenda. The Bidder shall certify its receipt of the addendum by signing the addendum and returning it with its Bid. In the event of a conflict with the original Bid Solicitation documents, addenda shall supersede all other documents to the extent specified. Subsequent addenda shall govern over prior addenda only to the extent specified.

C. PRICING, COLLUSION, AND TAXES

- 1) Current Prices. Bid Proposals must be fixed and firm unless stated otherwise in the Bid Solicitation.
- 2) Discounts. Discounts shall not be considered in determining the lowest net cost for Bid evaluation purposes. Payment terms shall be as set forth in any contract executed between the City and the Bidder. Payment by the City is deemed to be made on the date of the mailing of the check, or as otherwise set forth in any contract executed between the City and the Bidder.
- 3) Collusion. The Bidder, by affixing its signature to this Proposal, certifies that its Proposal is made without previous understanding, agreement, or connection either with any persons, or entities offering a Bid for the same items, or with the City. The Bidder also certifies that its Bid is in all respects fair, without outside control, collusion, fraud, or otherwise illegal action. To insure integrity of the City's public procurement process, all Bidders are hereby placed on notice that any and all Bidders who falsify the certifications required in conjunction with this section shall be prosecuted to the fullest extent of the law.

4) It shall be understood and agreed that Bid Offers submitted by persons and entities are done so independently of any other offers, and that Bidders will not knowingly participate in solicitations where there exists a conflict of interest with their entity and a member of City staff or their immediate family.

5) Taxes. Bidders will neither include Federal, State nor applicable Local excise or sales taxes in bid prices, as the City is exempt from payment of such taxes. The Colorado Department of Revenue, Certification of Exemption for Colorado State Sales/Use Tax account number for the City of Montrose is 98-01805-0000. An exemption certificate will be provided, where applicable, upon request.

D. PREPARATION AND SUBMISSION OF BID

- 1) The Proposal must be typed or legibly printed in ink. The use of erasable ink is not permitted. All corrections made by the Bidder must be initialed in ink by the Bidder or its lawful agent.
- 2) Bid Proposals must contain a manual signature of an authorized agent of the Bidder in the space provided on the Bid Proposal Form. If the Bidder or its lawful agent fails to sign the Bid Proposal Form, its Bid shall be considered non-responsive and ineligible for award.
- 3) Unit prices shall be provided by the Bidder on the Bid Proposal Form when required in conjunction with the prescribed method of award. The Bidder shall enter "No Bid" for each item where a unit price will not be offered. Where there is a discrepancy between the unit price and the extension of prices, the unit price shall prevail.
- 4) The delivery and/or completion date(s) provided by the Bidder, if required, must be stated in calendar days, following receipt of order/contract or official notice to proceed.
- 5) All information and supplemental documentation required in conjunction with this Bid shall be furnished by the Bidder with its Bid Proposal. If the Bidder fails to supply any required information or documents, the city, in its sole discretion, may consider the Proposal non-responsive.
- 6) The accuracy of the Bid is the sole responsibility of the Bidder. No changes in the Proposal shall be allowed after the submission deadline, except when the Bidder can show clear and convincing evidence that an unintentional factual mistake was made, including the nature of the mistake and the price actually intended.
- 7) The Bid Proposal Form shall be enclosed in a sealed envelope and addressed to the City. The envelope shall clearly identify the Bid Number, Title and Due Date when submitted to the City. The Bidder shall also include its name and address on the outside of the envelope.
- 8) The City's Bid Proposal Form, which is attached to this Bid Solicitation, must be used when the Bidder is submitting its Bid Proposal. The Bidder shall not alter this form unless instructed to do so in writing by the City. Failure to use the City's Bid Proposal Form may result in the Bid being considered non-responsive.
- 9) Offers in response to formal Bid Solicitations will not be accepted by facsimile transmission. Only signed written offers will be considered responsive, and eligible for possible award. Bidders shall provide Proposal Forms, Statement of Work/Technical Offer Section, Special Conditions, Specifications and Pricing Form, and any other mandatory submittals with the bid. If RFP contemplates sample contract, submit sample.
- 10) Bidders who qualify their Proposals by including alternate contractual provisions should be aware that the City does not negotiate the terms of its contracts, and will ordinarily declare such Bid Proposals non-responsive. Once bids have been opened, the City shall not consider any subsequent submissions of alternate terms and conditions.
- 11) Bid Bonds (5% of total bid price) and performance and payment bonds (100% of total bid price) are required on construction projects over \$50,000.
- 12) Insurance certificates are required after a Notice of Award has been issued. Costs for additional coverage must be included in the Bidder's proposal cost.
- 13) Bid Proposals received after the submission due date and time prescribed for the solicitation shall not be considered.

E. VENDOR APPLICATION AND RETENTION ON BIDDERS' LIST

The City does not maintain a bidder's list. Register to receive an automated email notification of new bids by visiting www.cityofmontrose.org - Department Services - Purchasing - Bidder's List.

F. MODIFICATION OR WITHDRAWAL OF LEGITIMATE OFFERS

- 1) Bidder offers may be modified in the form of an official written notice, and must be received prior to the due time and date set forth the Bid Solicitation. Each modification submitted must have the Bidder's name and return address and the applicable Solicitation Number and title clearly marked on the face of the envelope. If more than one modification is submitted, the modification bearing the latest date of receipt by the City will be considered the valid modification.
- 2) Bids may be withdrawn prior to the due time and date set for the Solicitation, provided it is in the form of an official, authorized written request.
- 3) Proposals may not be modified or withdrawn after the due date and time set for the Bid opening for a period of ninety (90) calendar days. If a Bid Proposal is modified or withdrawn by the Bidder during this ninety (90) day period, the City may, at its option, place the Bidder on suspension and may not accept any further Bid Proposals from the Bidder for a period set by the City following the Bidder's modification or withdrawal of its Proposal. The City may reject an offer, in whole or in part, as set forth in the City of Montrose Municipal Code, and the City's Procurement Manual.

G. EVALUATION OF OFFERS

- 1) Offers shall be evaluated based upon their responses to the questions and requests for information in this Bid Solicitation, and based upon whether and to what degree they comply with the instructions set forth herein. Thoroughness, accuracy, veracity, and professionalism in the responses shall be taken into account.
- 2) The City may, in its sole and absolute discretion:
 - a) Reject any and all, or parts of any or all, Bid Proposals submitted by prospective Bidders;
 - b) Re-advertise this Solicitation;
 - c) Postpone or cancel the Bid process for this Solicitation;
 - d) Waive any irregularities or technicalities in proposals received in conjunction with this Solicitation;
 - e) Determine the criteria and process whereby Proposals are evaluated and awarded.
- 3) A Proposal may not be accepted from, nor any contract be awarded to, any person or entity which is in arrears to the City upon any debt or Contract or which is in default as surety or otherwise upon any obligation to the City.
- 4) No Contract shall be awarded to any person or entity which has failed to perform faithfully any previous contract with the City, the State or Federal government for a minimum period of one (1) year after said previous Contract was terminated for cause.
- 5) A Proposal may not be accepted from, nor any Contract awarded to, any person or entity which has pending litigation against the City at the date and time of the Bid Opening.

H. AWARD OF CONTRACT

- 1) The City's Agent/Contact is authorized to handle initial contacts regarding any protest of the solicitation or award of a City contract, or any claim arising out of the performance of a City contract, with the City Manager's approval. Any actual or prospective Bidder or Contractor who has a grievance in connection with the solicitation or award of a contract shall first seek resolution of the matter with the City's Agent/Contact.
- 2) If the City Manager or City designee does not, within thirty (30) days after receiving a protest, or within such longer period as may be agreed upon by the parties, issue a written decision on the protest or make a determination that award of the contract is necessary, the protest shall be considered denied.
- 3) By law, the City reserves the right to accept or reject any or all proposed bids, or any combination of them, and to waive any informality or irregularity in the bid or in the bidding.
- 4) Successful Bidders shall comply with all local, state, and federal directives, ordinances, rules, orders, and laws as applicable to, and affected by, the Bid Proposal.
- 5) No Bidder shall be excluded from consideration for award in conjunction with this solicitation on the basis of race, color, creed, national origination, handicap or sex, or be subjected to discrimination under any contractual award administered by the City.

L. CONTRACTUAL OBLIGATIONS

- 1) In order to ensure the efficient utilization of tax dollars, successful Bidders shall comply with all contractual obligations contained in the Contract Documents, as set forth in the contract signed by the City and Bidder. A sample contract that Bidder will be expected to sign is supplied with these Bid Documents.

SPECIAL CONDITIONS

Company Name: _____

1. PRE-BID CONFERENCE IS NOT PROVIDED.

2. CONTACT PERSON

During the course of this request process, from issuance until a recommendation for award, Bidders shall not initiate contact related to this request with anyone other than the officially designated individual:

For this bid the contact is Kendall Cramer at 9704978531 or email: kcramer@ci.montrose.co.us

Failure to abide by this requirement may result in disqualification from further participation in this process.

3. QUESTION DEADLINE:

All questions regarding this Request For Proposal shall be directed in writing (mail, email or fax) to Kendall Cramer or email address: kcramer@ci.montrose.co.us or mailed to P.O. Box 790, 433 South First Street; Montrose, CO 81402. All inquiries shall clearly identify the name of the firm and the authorized representative, the RFP number and Title and a method or address to which the responses shall be made.

The deadline for receipt of questions from Bidders in regards to this RFP is Thursday August 1, 2019.

Responses will be prepared by the City in an addendum and published on the City of Montrose web site at: www.cityofmontrose.org under Department Services, Purchasing, Open bids, under this bid name. The responses in writing are the only official answers.

4. SUBMITTAL INSTRUCTIONS:

The City desires to receive a clear, concise, economical presentation of the vendors proposal. Bidders should include the following information in their Proposal and use the following format when compiling their responses.

- A. One (1) copy and one original of the bid packet beginning with "Special Conditions" section.
- B. Submit signed bid addendum(s).
- C. Submit a bid packet in a sealed envelope with the bid number and project name in the lower left hand corner of envelope, with the bidders name clearly written on the envelope.

Failure to submit a proposal in the manner indicated may be cause for it to be considered 'non-responsive' and ineligible for consideration and subsequent award.

PROPOSAL FORM - PAGE 1

SUBMITTED BY: Company Name: _____

Address: _____ City: _____

State: _____ Zip: _____

Phone: _____ Fax: _____

CERTIFICATION: (if a Submission is Offered):

The undersigned hereby affirms that:

- He/she is a duly authorized agent of the Bidder,
- He/she has read the General Terms and Conditions, the Special Conditions and any technical specifications that were made available to the Bidder in conjunction with this Bid and fully understands and accepts these terms unless specific variations have been expressly listed on the Bid Proposal Form;
- The Submission is being offered independently of any other Bidder and in full compliance with the collusive prohibitions specified in the General Terms and Conditions of this solicitation; and
- The Bidder will accept any awards made to them as a result of this Solicitation for a minimum of ninety (90) calendar days following the date and time of the bid opening.

By: _____ Date _____

Manual Signature of Agent

Date

Typed/Printed Name of Agent

Title of Agent

Include Original with Submission

Affix Manual signature of authorized agent.

NO OFFER:

Indicate reason(s) why no offer is being submitted at this time.

PROPOSAL FORM - PAGE 2

Company Name: _____

PROMPT PAYMENT TERMS:

Discount: _____ % _____ Days

Net: _____ Days

VARIATIONS:

The Bidder shall identify all variations and exceptions taken to the General Terms and Conditions, the Special Conditions and any Technical Specifications in the space provided below; provided, however, that such variations are not expressly prohibited in the Bid documents. For each variation listed, reference the applicable section of the bid document. If no variations are listed here, it is understood that the Bidder's Proposal fully complies with all terms and conditions. It is further understood that such variations may be cause for determining that the Bid Proposal is non-responsive and ineligible for award:

Page #: _____ Item # of Section: _____

Variance

Page #: _____ Item # of Section: _____

Variance

Page #: _____ Item # of Section: _____

Variance

STATEMENT OF WORK

Company Name: _____

PART 1 – GENERAL ITEMS

1.01 Project Purpose/Description

The City of Montrose has been selected to receive a Certified Local Government grant from History Colorado and the National Park Service to prepare a city-wide historic survey plan which will help guide the city as we prioritize future historic resource surveys. The survey plan will provide the newly created Historic Preservation Commission (HPC) with a clear and concise strategy to document Montrose's historic resources. The effort will help to create a road map for the HPC for at least the next 10 years, beginning with documentation of the most threatened and least-documented resources. Prioritizing survey efforts will help to ensure the most prudent use of limited funding. The city is seeking proposals from qualified historic preservation consultants to complete the plan. Specifically, the city seeks proposals on an approach/methodology to complete the following tasks as outlined in the city's executed grant agreement with History Colorado.

- A. Conduct Research
 - a. Evaluate existing surveys and documentation
 - b. Conduct limited reconnaissance survey
 - c. Identify historic contexts
 - d. Develop preservation goals and objectives
- B. Complete Historic Resource Survey Plan
- C. Conduct Public Outreach

1.02 Historic Surveys

Similar work has been completed in portions of the project area. Historic buildings surveys were completed in 1981 and 1999. The 1981 survey boundaries included one block on either side of Main Street, from Park Avenue, on the east, to Selig Avenue on the west. In addition, the Coors buildings and the Denver and Rio Grande Depot at North First Street and Rio Grande Avenue were included in the survey. Sixty-three (63) buildings were surveyed. The 1999 survey included buildings primarily on Main Street. The survey area was bounded by the railroad tracks on the west, the north faceblock of North Street on the north, Park Avenue on the east, and the south faceblock of South First Street on the south. Seventy four (74) resources were previously surveyed under the 1999 survey. Of the 74, 60 had been previously recorded under the 1981 survey. Six (6) resources within the 1999

survey area are listed in the National Register of Historic Places: the Montrose County Courthouse, 320 South First Street (5MN1813), and Montrose County Jail, 121 S. Townsend Avenue (5MN5046); the U.S. Post Office, 321 South First Street (5MN1808); the Denver and Rio Grande Railroad Depot, 21 Rio Grande Avenue (5MN1661); the Montrose City Hall, 433 South First Street (5MN1811); and the Methodist Episcopal Church, 19 South Park Avenue (5MN4493). Both surveys have been attached as Exhibit A and Exhibit B.

1.03 Survey Area

The survey planning area encompasses all buildings within the city's municipal boundaries. The survey area includes approximately 3,582 structures built between 1880 and 1979 as shown in the table below.

From	To	Count
1880	1889	32
1890	1899	250
1900	1909	345
1910	1919	736
1920	1929	115
1930	1939	163
1940	1949	245
1950	1959	256
1960	1969	547
1970	1979	893

Included as Exhibit C is a map showing buildings (Single Family Residences, Commercial, and Apartments). The map is color coded by decade for year built up to 1979.

1.04 Required Standards

The selected consultant will be tied to the terms, conditions, and requirements of the grant contract with History Colorado (attached as Exhibit D) through a contract agreement with the City of Montrose. An example of the City of Montrose's standard Independent Contractor and Professional Services Contract is included as Exhibit E.

Interested historic preservation consultants must conduct work in accordance with the guidelines of History Colorado and the Certified Local Government Program and must have the experience and education required by the Secretary of the Interior's Professional Qualifications Standards and Secretary of the Interior's Standards and Guidelines for Historic Preservation and Archaeology. Compensation will not be provided for work not meeting these standards, as deemed in the judgement of History Colorado.

Consultants shall meet professional qualifications described in 36 CFR 61, "Procedures for Approved State and Local Government Historic Preservation Programs," April 13, 1984, or otherwise approved by History Colorado.

The project will conform to OMB's Uniform Guidance. When selecting a consultant for the project, the city will follow the requirements of Title 2 Part 200.318 of the Code of Federal Regulations.

All work must be completed to the standards provided by History Colorado and detailed in the Colorado Survey Manual (<https://www.historycolorado.org/sites/default/files/media/document/2017/1527.pdf>). Survey forms are provided by History Colorado.

All photographs must be properly labeled in accordance with the Colorado Survey Manual.

Survey work must meet the Secretary of the Interior's Standards and Guidelines for Identification and Evaluation published September 29, 1983 in the Federal Register.

1.05 Products Specific to Survey Projects

Consultant shall prepare a draft and final survey report that follows the format outlined in the Colorado Survey Manual. Included in the final survey report shall be a map which clearly delineates the project boundaries. The map shall also identify individual properties or districts that appear to meet the National Register criteria. The survey report shall also include a listing of all the properties surveyed with their official state site numbers (Smithsonian Trinomial number) and an evaluation of their significance.

Consultant shall provide a USGS 7.5' quad map plus a city plat or planning map outlining the boundaries of the survey area with a key that identifies the boundaries of eligible districts, contributing and non-contributing properties and individually eligible properties. Each resource recorded during the project should be clearly identified on the map by state site number.

Consultant shall provide a plan to keep the public involved/updated throughout the project.

Consultant shall present the results of the completed survey at a public meeting. Minutes of the meeting shall be provided.

All inventory forms completed for the survey should be completed in accordance with the established instructions and must include appropriate location data and state site numbers.

1.06 Project Deliverables & Timeline

The city and consultant will coordinate on the timely submission of project deliverables. The following deliverables are required by History Colorado.

1. Documentation of three bids (City)
2. Consultant Resume (Consultant)
3. Subcontract Certification Form (City)
4. Initial Consultation with OAHP Staff and Selected Consultant (City & Consultant)
5. Outline of Historic Resource Survey Plan (Consultant)
6. Draft Historic Resource Survey Plan (Consultant)
7. Final Historic Resource Survey Plan (Consultant)

8. Documentation of Public Outreach (City and Consultant)
9. Final Project Report (City and Consultant)

All project activities must be completed by June 30, 2020.

1.07 Project Budget

This project will be funded through a grant from History Colorado and the National Park Service in the amount of \$25,000. Therefore, there is a project ceiling of \$25,000 for this project. Budget proposals should not exceed this amount. No contingencies are included for this project.

PART 2 – PROPOSAL FORMAT AND SELECTION

2.01 PROPOSAL FORMAT

The following information shall be included in the proposal package submitted by the deadline date.

Title Page

- Name of Consultant(s), Address(es), Telephone and Fax Number(s)
- Name of Project Director/Principal Contact including direct phone number(s) and email address(es)
- Names of Professional Staff Assigned to the Project
- Date of Proposal
- Signature of Person having proper authority to make formal commitments on behalf of the firm

Project Proposal

- Problem Statement, Description of Project Proposal, Consultant's Interest
- List of major tasks required for the project and specific personnel assigned to each task.
- Project schedule – define anticipated time schedule for each of the defined tasks. Identify, if any, all data, facilities and equipment the City is required to provide for Consultant to p

Qualifications

- Resumes of professional staff assigned to the project
- Describe similar historic survey plans completed by the principal staff and any innovative techniques incorporated into the projects (list a contact name and a phone number for ea
- Describe other relevant experience of the Consultant(s) or principal staff.
- List at least three (3) professional references of the Consultant(s). Include the name of the organization, a brief summary of the work, and the name and telephone number of a res
- Provide a statement on your organization's current workload and ability to complete the project on time. Finances/Budget

Finances/Budget

- List hourly rates for key staff working on the project.
- Provide a proposed breakdown of fees for each milestone, including all personnel time, equipment, supplies, overhead expense and profit. Note: the proposed budget may not exc
- Describe any other pertinent information that will give the evaluation team general information to determine the overall efficiency and effectiveness with which the firm does busi

Optional Additional Data

- Provide any additional information that will aid in evaluation of the Consultant's qualifications with respect to this project.

2.02 SELECTION CRITERIA

Proposals will be reviewed and scored independently by an evaluation committee. The committee will score each proposal on a scale of 0 to 4 based on the weighted evaluation criteria listed below.

-

Overall Presentation/Level of Detail (30%)

- Bidder's Qualifications/Experience (30%)
- Financial Viability of Proposal (20%)
- Timeline/Schedule for Proposal (20%)

Upon scoring, the City will select a proposal. The City Council reserves the right to select or reject any proposal.