REQUEST FOR PROPOSAL
FOR
ARCHITECTURAL AND ENGINEERING (A&E) SERVICES

RFP #1-2012

CUMBRES & TOLTEC SCENIC RAILROAD
ROUNDHOUSE & VISITOR CENTER
CHAMA, NEW MEXICO

October 10, 2012

Friends of the Cumbres & Toltec Scenic Railroad
in collaboration with the
Cumbres & Toltec Scenic Railroad Commission
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PROJECT INFORMATION

A. PURPOSE

The Friends of the Cumbres & Toltec Scenic Railroad (the Friends) is requesting proposals for architecture and engineering (A&E) services based on the scope of work described below. All potential offerors are to read, understand and accept the requirements of this Request for Proposal (RFP).

B. BACKGROUND

The Friends, a 501(c)(3) non-profit, is the recognized museum arm of the Cumbres & Toltec Scenic Railroad (C&TSRR) which is jointly owned by the States of New Mexico and Colorado. The Friends and the C&TSRR Commission, which includes four members appointed by the Governors of the states of New Mexico and Colorado, are jointly involved in raising funds, planning, designing and constructing a Roundhouse and Visitor Center (RVC) to be located on the railroad’s property in Chama, New Mexico. This project involves reconstruction of an historic roundhouse and turntable which existed in the Chama rail yard from 1899 until approximately 1952.

The C&TSRR owns the property, including the land and structures, and the Friends are responsible for overseeing design and engineering services for the reconstructed building which will serve as a multi-purpose facility for the Friends’ organization and the railroad. This facility will include a visitor center and museum, accessible to the public; maintenance and repair bays for the operational rolling stock; and restoration work space for the Friends. A plot plan of the Chama rail yard, highlighting the location of this facility, is located in Appendix A.

The Railroad. The C&TSRR, the successor to the original Denver & Rio Grande Railroad-San Juan Extension (D&RG) built in 1880, operates today as a 64-mile “living museum”: a coal-fired, steam-powered narrow gauge railroad between Chama, New Mexico and Antonito, Colorado. The railroad is listed on the National Register of Historic Places as a site of national historic significance. A current application to designate the railroad as a National Historic Landmark has been approved by two key advisory committees to the Secretary of the Interior and his approval is anticipated before the end of CY 2012. A key strategic objective of the C&TSRR Commission and the Friends is to reconstruct the railroad’s historic nine-bay roundhouse and turntable in Chama, NM which were decommissioned by the D&RG on a phased basis during the period 1948-1952. All that remains of the original structure are two bays and the original machine shop, described in greater detail in the “Scope” section of this document. A more detailed historical perspective is provided in Appendix B.

The Friends. A recognized leader in the railroad preservation field, the 2,400 member Friends’ organization is responsible for all the historic assets of the C&TSRR and manages the interpretation, preservation and restoration functions of the railroad. In particular, the Friends’ organization interprets all of the railroad’s historic assets along the 64-mile line by providing docents on the trains and participating in regularly scheduled work sessions during the railroad’s operating season (from May to October) to perform work activities related to its mission. The Friends’ organization provides an estimated 40,000 hours of volunteer labor annually and, over the years, has raised several million dollars in cash and contributed substantial matching funds for restoration and interpretive work as well as direct support to the railroad to assure its continuing operation. In recognition of its efforts, the Friends’ organization has received awards from the New Mexico State Legislature, the Colorado Historical
Society and the New Mexico State Historic Preservation Office (SHPO). The Friends is an affiliate member of the Association of Railway Museums, a member of the American Association for State and Local History, and a member of the Tourist Railway Association (TRAIN). In November 2001, TRAIN awarded the Friends its most prestigious honor, the Crook-Freeman-O’Brien award, in recognition of its actions to preserve the railroad.

The Commission. The Friends’ organization works in close partnership with the CTSRR Commission, a four-person entity established by the States of Colorado and New Mexico for the dual purpose of (1) preserving and developing the railroad for the education, enlightenment and enjoyment of future generations and (2) providing for the economic development of the region.

The two entities – the Commission and the Friends – constitute an integrated whole, accomplishing their respective roles and responsibilities in a unique public-private partnership, all dedicated to the common goal of preserving this national treasure and icon of the American West – the C&TSRR.

The C&TSRR, in its entirety, is designated by the National Park Service as a site of national historic significance. The Friends’ organization has submitted an application to the National Park Service, recommending the designation of the C&TSRR as a National Historic Landmark. That application has been approved by two key NPS review committees and is currently being staffed for approval by the Secretary of Interior. The designation is expected to occur by fall 2012.

C. SCOPE OF WORK

The Friends have received funding from the Federal Highway Administration (FHWA) through the New Mexico Department of Transportation’s (NM DOT) Statewide Transportation Improvement Program (STIP) for the project described herein. These funds are designated for use in acquiring the services of an A&E firm for the following services (referred to in the NM DOT Cooperative Project Agreement as the Plans, Specifications and Estimates ([PS&E]) Package):

- Programming and master planning (use determination, pre-design and construction engineering services, including surveys and archaeological and environmental assessments, and prioritization scheduling);
- Concept development and schematic design (preliminary alternative materials and systems recommendations, including life-cycle maintenance and feasibility of utilizing alternative energy sources);
- Design development (including presentation of a portable model of the building);
- Construction plans;
- Engineer’s estimate/engineer’s opinion of probable cost; and
- Specifications and contract book.

The successful offeror will serve as the Friends’ A&E contractor for the duration of this project – from design through completion of the construction documentation phase. It is anticipated that the C&TSRR Commission will be responsible for the acquisition of contract services required for constructing the facility. The schedule for the construction phase is dependent upon available funding. The current funding is anticipated to complete Phase I (as defined in Items 1 – 6, above).
The successful offeror will be expected to acquire and oversee the necessary engineering services to complete surveys of the site; conduct both archaeological and environmental assessments; perform a Traffic Impact Analysis (TIA) per the NMDOT State Access Management Manual; and provide specialized rail and bridge engineering expertise necessary for design and installation of the historic turntable as described further in Section D., Special Considerations.

Please refer to the attached Program Design Layout documents (Appendix E)) for the following discussion:

For the Roundhouse & Visitor Center complex, the selected A&E firm will design a complete and usable multi-purpose facility (visitor center and museum, railroad operations and maintenance and restoration) and environs, utilizing the remaining two bays and existing shop space as identified in Appendixes C and D. The reconstruction will be based on the historic Chama roundhouse – originally a nine-bay complex with a turntable as described below – and must be consistent with the Secretary of the Interior’s Standards for the Treatment of Historic Properties, specifically the NPS Reconstruction Standards:

http://www.nps.gov/hps/tps/standguide/reconstruct/reconstruct_index.htm

Estimated square footage of the proposed multi-purpose facility is 30,750 square feet. Square footages are open for discussion once the A&E work is underway. The reconstructed facility will encompass the following required elements:

1. A nine-bay roundhouse, utilizing the existing two bays, original machine shop and newer machine shop, built in 1970, as an integral part of the reconstructed facility (see Appendix E.1), allocated as follows:
   a. Six bays, the existing locomotive shop and the new machine shop are programmed for operations and maintenance of the C&TSRR rolling stock (approximately 15,750 sf); the two eastern-most bays are identified as “mutual use space” to be shared by the Commission’s operations and maintenance staff and the Friends;
   b. New space on the east side of the proposed facility is programmed for the Friends’ restoration work on historic rolling stock, including metal and woodworking area, tools and training rooms, a library/conference space and work stations for administrative support (approximately 8,000 sf);
   c. Three bays (two existing and one reconstructed) and the area identified as the existing original machine shop are programmed for the Visitor Center/Museum (approximately 7,000 sf). This includes:
      (1) An entry vestibule with ticketing;
      (2) Handicapped-equipped restrooms;
      (3) A museum store, prominently located (no less than 400 sf);
      (4) Five thousand feet of “black box” exhibit space; and
      (5) An orientation theater-type space sized for approximately 20-25 people.
   d. A public viewing area from the Visitor Center/Museum bays into the railroad roundhouse area (see areas G and F, Appendix E);
   e. Mechanical, electrical and plumbing necessary to support the facility;
   f. The ceiling of the newer machine shop, built in 1970, to be modified to support a 20-ton bridge crane;
   g. An engine turntable, similar to the original 65’ deck and girder turntable used by the D&RGW at the Chama location. Current plan is for the railroad to locate an existing and historically relevant turntable for this portion of the reconstruction;

1 Note that conceptual renderings provided are not prescriptive in nature; they are solely intended to provide potential offerors with basic information about existing and historic structures.
h. A detailed plan for public access from the parking area near the Chama Depot (located on the west side of the railroad tracks) to the proposed Roundhouse and Visitor Center (located on the east side of the railroad tracks) in a safe and efficient manner (see Appendix F); and

i. A detailed TIA of all traffic operations, access and safety impacts within the prescribed study area for the proposed development. The TIA consists of an engineering evaluation and preparation of a traffic study report per the NMDOT State Access Management Manual, Chapter 6, Section 16 – Traffic Studies for Land Development

The Friends will utilize the services of its contracted exhibit design firm, Merriell & Associates, of Santa Fe, NM, to further design the exhibits. This firm will work with the successful offeror to incorporate developed conceptual exhibit design planning into the A&E phase of this project. Merriell & Associates have developed a Master Interpretive Plan for the railroad which is available to review on the Friends’ web site:


This plan was developed based on the assumption that the Visitor Center and Museum would be housed in a stand-alone facility with significantly more space than will be available in the multi-purpose facility; however, many of the conceptual designs and the text related to the Visitor Center/Museum are current and valid. A bubble diagram depicting the key themes and approaches is included in Appendix G.

Offerors will be expected to use their creativity in preparing a concept that will incorporate all of the required program elements and as many optional features as possible, given the budget.

The design and construction of the project shall integrate building materials and methods that promote environmental quality and energy efficiency, and shall achieve a minimum delivered energy performance standard of 50% of the US energy consumption for that building type as defined by the U.S. Department of Energy. It is expected that the successful offeror will provide recommendations for applying and possibly achieving a LEED\textsuperscript{2} rating for this project.

The Friends reserves the right to revise the scope of work or the estimated allowable construction costs for this project, and adjust the fee accordingly.

**D. SPECIAL CONSIDERATIONS**

There are numerous factors which the contractor should take under consideration, both for their efforts and for the work of the contractors that will construct this project. These include, but are not limited to, seasonal weather issues and railroad operations, requirements by the New Mexico Historic Preservation Division and the U.S. National Park Service, a remote location with limited resources, unknown buried obstacles, environmental requirements and historic site features. The contractor will be expected to make a significant effort to identify and quantify these features.

In addition, the work takes place in an operating railroad environment so all activities must be carefully planned to avoid disruptions to railroad operations. Construction must be phased to minimize down-time by railroad activities which continue year-round. For example, the new shop must be completed so that the railroad can move the machinery to the new shop before any work will be permitted in the existing shop. The contractor shall take phasing and time limits into account when designing the project.

\textsuperscript{2} Leadership in Energy and Environmental Design (LEED) rating system is described under “Definition of Terminology” on page 5 of this document.
Finally, the project involves installing a turntable and revising trackage in the yard. The contractor shall engage a subcontractor that is experienced in railroad matters, including Federal Railroad Administration (FRA) requirements for bridges and trackage and has the qualifications to satisfy FRA requirements.

E. SCHEDULE OF SERVICES & ESTIMATED COSTS AND FEE

The proposed project schedule is as follows:

<table>
<thead>
<tr>
<th>Phase</th>
<th>Estimated Schedule</th>
<th>Responsible Parties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Programming/Master Planning</td>
<td>6 Weeks</td>
<td>Primary: A&amp;E; engineering &amp; survey firms.</td>
</tr>
<tr>
<td>-- Review</td>
<td>2 Weeks</td>
<td>Oversight: Friends, Commission &amp; Operator</td>
</tr>
<tr>
<td>Concept Development – Schematic Design</td>
<td>7 Weeks</td>
<td>Primary: A&amp;E</td>
</tr>
<tr>
<td>-- Review</td>
<td>2 Weeks</td>
<td>Oversight: Friends, Commission &amp; Operator</td>
</tr>
<tr>
<td>Design Development</td>
<td>8 Weeks</td>
<td>Primary: A&amp;E</td>
</tr>
<tr>
<td>-- Review</td>
<td>2 Weeks</td>
<td>Oversight: Friends, Commission &amp; Operator</td>
</tr>
<tr>
<td>Construction Documents</td>
<td>12 Weeks</td>
<td>Primary: A&amp;E</td>
</tr>
<tr>
<td>-- Review</td>
<td>3 Weeks</td>
<td>Oversight: Friends, Commission &amp; Operator</td>
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<tr>
<td>ESTIMATED A&amp;E DESIGN PROJECT LENGTH</td>
<td>42 Weeks</td>
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</table>

Estimated Cost: $5,000,000³

Proposed Fee: The Friends will negotiate the fee determined to be fair and reasonable for this scope of work, using the Approved Architect/Engineering Rate Schedule as defined by New Mexico Code 1.5.18. Normal travel expenses in connection with this project are included in basic services. Project-specific reimbursables will be defined in the final Project Agreement between the Friends and the A&E firm (see Attachment 2).

Prospective offerors are encouraged to evaluate the scope of work and to discuss the project with the Friends’ designated Technical Project Manager concerning technical information (see Section II.B). While a specific date will be set for all offerors to visit the site and receive project information, they may call to schedule other visit times.

F. DEFINITION OF TERMINOLOGY

This paragraph contains definitions and meanings that are used throughout this Request for Proposals (RFP), including appropriate abbreviations.

"A&E" means the New Mexico licensed architecture and engineering firm or consultant selected for this project by the Friends, in collaboration with the railroad Commission.

³ Estimated cost includes facility construction, remodeling of existing shop space, engineering services and installation of turntable, and acquisition of major equipment. It does not include final design, fabrication and installation of exhibits or major equipment purchases. The exhibit design, fabrication and installation costs are estimated to be $1.3M.
"Determination"- The written documentation of a recommendation made by the Friends’ Source Evaluation Panel, including findings of fact required to support a decision. A determination becomes part of the procurement file to which it pertains.

“General Provisions”- The terms such as “can”, “may”, “should”, “preferably”, or “prefers” identify a desirable or discretionary item of the RFP. Failure to comply with such an item will not result in the rejection of the Offeror’s proposal.

"LEED" - (Leadership in Energy and Environmental Design) Green Building Rating System® is a voluntary, consensus-based national standard for developing high-performance, sustainable buildings, created and administered by the U.S. Green Building Council. In achieving a LEED rating, the project must achieve a minimum delivered energy performance standard of 50% of the US energy consumption for that building type as defined by the U.S. Department of Energy.

“Mandatory Requirements”- Terms such as "must," "shall," "will," "is required," or "are required" identify a mandatory requirement of this RFP. Failure to comply with such a mandatory factor shall result in the rejection of the offeror’s proposal. Rejection of the proposal will be subject to review by the Source Evaluation Panel and a final decision on rejection will be made by the Friends’ President and Chief Executive Officer.

"Offeror" is any person, corporation, or partnership who chooses to submit a proposal in response to this RFP, with the intent of providing A&E services for this project.

"Proposal" is the offeror’s response to this RFP.

"Request for Proposal" or "RFP"- This document, any attachments incorporated by reference, and any amendments issued for use in soliciting proposals for this project.

"Responsive Offer" or "Responsive Proposal"- An offer or proposal which conforms in all material respects to the requirements set forth in the RFP as determined by the Friends’ Source Evaluation Panel. Material respects of an RFP include, but are not limited to quality, quantity or delivery requirements.

"Selection" - A formal written notice by the President and CEO of the Friends’ organization that an A&E firm has been recommended and selected.

"Source Evaluation Panel" - A body constituted by the Friends and the C&TSRR Commission to evaluate proposals and make recommendations on the best qualified and most responsive offer to the Source Selection Official. The Source Evaluation Panel is chaired by the Friends’ designated Technical Project Manager and includes representatives of the Friends and the Commission.

“Source Selection Official” – The individual designated to approve the final selection for this procurement is the Friends’ President and Chief Executive Officer.

“Technical Irregularities” are matters of form rather than substance evident from the proposal document, or insignificant mistakes that can be waived or corrected without prejudice to other offerors; that is, when there is no effect on price, quality or quantity. If discussions are not held or if best and final offers upon which award will be made have been received, the Source Evaluation Panel may waive such irregularities or allow an offeror to correct them if either is in the best interest of the organizations. Examples include the failure of an offeror to:
1. Submit the number of signed proposals required by the RFP;
2. Sign the proposal, but only if the unsigned proposal is accompanied by other material indicating the offeror’s intent to be bound; or
3. Acknowledge receipt of an amendment to the RFP, but only if: 1) it is clear from the proposal that the Offeror received the amendment and intended to be bound by its terms; or 2) the amendment involved had no effect on price, quality or quantity.

II. CONDITIONS GOVERNING THE PROCUREMENT

This section of the RFP outlines and describes the major events of the selection process and specifies general requirements.

A. PLANNED SEQUENCE OF EVENTS

<table>
<thead>
<tr>
<th>Event</th>
<th>Responsible Party</th>
<th>Date</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Issue RFP</td>
<td>Friends’ organization</td>
<td>10-3-2012</td>
<td></td>
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<tr>
<td>2. Questions/Clarifications</td>
<td>Friends/Commission/Operator</td>
<td>As requested prior to submission</td>
<td>Teleconference</td>
</tr>
<tr>
<td>3. Pre-proposal Meeting &amp; Site Visit</td>
<td>Friends/Commission/Operator</td>
<td>Week of 10-22-2012</td>
<td>Chama, NM</td>
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<tr>
<td>4. RFP Amendments</td>
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<td>Prior to submission</td>
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<tr>
<td>5. Submission of Proposal Deadline</td>
<td>Friends/Offerors</td>
<td>11-30-2012</td>
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<tr>
<td>6. Proposal Shortlisting</td>
<td>Source Evaluation Panel</td>
<td>12-7-2012</td>
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<tr>
<td>7. Notice of Finalists</td>
<td>Friends</td>
<td>12-7-2012</td>
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</tr>
<tr>
<td>8. Interviews</td>
<td>Selection Committee</td>
<td>12-17-2012</td>
<td>Albuquerque, NM</td>
</tr>
<tr>
<td>9. Notice of Award</td>
<td>Friends</td>
<td>12-21-2012</td>
<td></td>
</tr>
</tbody>
</table>

NOTE: If the Source Evaluation Panel recommends a selection after Step 5 which is accepted by the selecting official, Steps 6, 7 and 8 will not apply.

B. EVALUATION PROCESS

1. Issue RFP - This RFP is issued by the Friends of the Cumbres & Toltec Scenic Railroad.
Contact information:

Friends’ President/ CEO: Tim Tennant
Phone: (505) 880-1311
Fax: (505) 856-7543
E-Mail: TimTennant@cumbrestoltec.org

Technical Project Officer: Russell C. Hanscom
Phone: (505) 716-7176
E-Mail: rphanscom@earthlink.net

2. Questions/Clarifications/Site Visits – Between issuing the RFP and Submission of Proposals, prospective offerors may contact the Friends’ designated Technical Project Manager with questions about the scope of the project or the RFP schedule. The Standard Agreement between the Friends and A&E is attached to this RFP (see Attachment 2). Offerors are encouraged to familiarize themselves with this Standard Agreement. If there are any questions concerning the project or selection process, please contact Friends’ President and Chief Executive Officer, Tim Tennant. Evaluation points are awarded for understanding the scope of work (see Section VI - Evaluation). After submission of the proposal, the offerors shall only contact the Friends in writing, asking specific questions. These questions and the Friends’ responses will be made available to all offerors.

3. Pre-Proposal Meeting and Site Visit - Provides interested offerors an opportunity to discuss the intent of the project with the Friends, the Commission and the operator. Interested offerors are not required to attend; however, they are encouraged to attend to fully understand the scope of the project. Offerors will see a presentation and tour the designated project site.

4. RFP Amendments - If an RFP amendment is deemed necessary it will be issued prior to the submission deadline. A Friends’ representative will distribute the amendment in writing to all recipients of the RFP.

5. Submission of Proposal – Seven (7) copies of offeror’s proposal must be submitted in a sealed envelope, addressed to:

Friends of the Cumbres & Toltec Scenic Railroad, Inc.
RFP Number: 1-2012
4421 McLeod NE, Suite F
Albuquerque, NM 87109
ATTENTION: Tim Tennant, President/CEO

a. Receipt of Proposals: The Friends will time-stamp proposals at the reception desk and hold in a secure location. A log will be kept of the names and submittal times of all proposals. Proposals received after the deadline will be deemed non-responsive, and will be returned unopened to the Offeror.

b. Confidentiality of Proposals: Proposals will not be opened publicly and shall not be open to public inspection until after an Offeror has been selected for award of the contract. An Offeror may request in writing non-disclosure of confidential data. Such data shall accompany the proposal and shall be readily separable from the proposal in order to facilitate eventual public inspections of the non-confidential portion of the proposal.
c. Non-Conforming Proposals: Proposals will be reviewed for completeness, format, and compliance with the requirements of the RFP. If any proposal is deemed non-responsive by the Source Evaluation Panel, the Offeror will be notified in writing of such determination.

6. Proposal/Shortlisting - The Source Evaluation Panel will review each conforming proposal. Points will be allocated per Section VI of this RFP, by each panel member. Members’ point totals will be translated to a numeric ranking. The committee member rankings will be totaled to determine the overall ranking of the firms. If more than three proposals are submitted the Source Evaluation Panel may decide to hold interviews with the three highest-ranked Offerors. If fewer than three proposals are received the Source Evaluation Panel may either recommend award to the Source Selection Official or recommend that the RFP be reissued. The Panel shall determine the rankings without the possibility of a tie.

7. Pre-Interview Teleconference - If interviews are determined to be necessary, the Friends will notify firms with a date and time for a pre-interview teleconference meeting. The pre-interview teleconference will be conducted by the Friends’ President and CEO and the Technical Project Manager to answer any questions regarding the interview process. The Source Evaluation Panel shall issue a list of prepared questions to be addressed by the firms during the interview. These questions are the basis of scoring by the committee. During the pre-interview teleconference, receipt of these questions will be verified, along with the time and location of the interviews.

8. Interviews/Award – Offeror may use up to two (2) hours to present their site plans and building concepts. Overall rankings from the interview shall determine the firm to be awarded the project. Notice to finalists will include the interview date, time, location and interview questions. Scoring for the interview will be based on responses to the questions presented at the pre-interview teleconference. Points will be allocated by each member. Each member’s point totals will be translated into a numeric ranking of the interviewed firms. Individual member rankings will be totaled together to determine the overall ranking from interview. In the event of a tie for first, after the completion of interviews, the tie shall be broken by awarding to the firm with the higher ranking from the shortlist. All calculations of point standings shall occur during the Source Evaluation Panel meeting for this project with all members in attendance.

9. Notice of Award - The President & CEO of the Friends will notify the selected offeror in writing of the final award decision.

10. Contract Negotiations - The Friends President and CEO and the successful offeror will begin contract negotiations as soon as possible after notice of award. Final A&E fees are determined during contract negotiations and depend on such factors as project size and complexity as related to the approved A&E Rate Schedule (1.5.18 NMAC) The A&E fees shall be negotiated within the framework of 13-1-122 NMSA, 1978 as per the A&E Rate Schedule (1.5.18 NMAC).

C. GENERAL REQUIREMENTS / INFORMATION

This section contains information about the RFP process and conditions which this RFP is issued and how the intended project will be completed.

1. Incurring Cost - Any cost incurred by the Offeror in preparation, transmittal, or presentation of any proposal or material submitted in response to this RFP shall be borne solely by the Offeror.

2. Consultants- Since the award is made on a quality-based evaluation process, replacement of consultants after award of and prior to the contract execution may cause the Offeror to be disqualified.
3. Amended Proposals - An offeror may submit an amended proposal prior to the deadline for receipt of proposals. Such amended proposals must be complete replacements for a previously submitted proposal and must be clearly identified as such in the transmittal letter.

4. Offeror's Rights to Withdraw Proposal - Offerors will be allowed to withdraw their proposals at any time prior to the date for interviews. The Offeror must submit a written withdrawal request signed by the Offerors to the Friends’ President and CEO.

5. Disclosure of Proposal Contents - Proposal contents will be kept confidential until written notice of award has been issued. At that time, all proposals will be open to the public, except for the material which has clearly been noted and deemed as proprietary or confidential by the Offeror.

6. Termination of RFP - This RFP may be canceled at any time and any and all proposals may be rejected in whole or in part when the President and CEO of the Friends determines such action to be in the best interest of the organization. The RFP process may be terminated at any time if sufficient appropriations or authorizations do not exist. Such termination will be effected by sending written notice to the A&E firm. The Friends’ decision as to whether sufficient funds are available will be accepted by the Offeror as final.

7. Clarifications from Offerors - The Source Evaluation Panel, after review of the proposals and/or interviews, may request clarifications on information submitted by any and all Offerors in a written format, with a specified deadline for response.

8. Electronic Data - Construction documents and specifications must be prepared using computer technology. Electronic drawing files shall be provided in AutoCAD format and specifications in Microsoft Word.

III. RESPONSE FORMAT AND ORGANIZATION

A. NUMBER OF RESPONSES/COPIES

Only one proposal may be submitted by each Offeror for this project. Offerors shall provide seven (7) identical copies of their proposal at the location specified in Section II.

B. PROPOSAL FORMAT

The proposal shall be limited in format and length. Format will be 8-1/2” x 11” with fold-out sheets allowed up to 11” and 17” in size. All fold-out sheets, up to a maximum of 11” x 17” sheets, will be counted as two pages and shall be labeled as such. Length of the proposal shall be limited to a maximum of twenty (20) numbered pages (printed sheet faces) of text no smaller than 11 point, and/or graphics. If there is any question as to format requirements, contact the Friends’ President & CEO for clarification prior to submittal of the proposal.

Material excluded from the twenty (2) pages maximum count is limited to:
- Front cover (photos with captions on inside cover are allowed)
- Divider pages (blank except for title information)
- Back cover (photos with captions on inside of back cover are allowed)
- Submittal letter (one page maximum)
1. Proposal Organization - All pages shall be numbered except for those specifically excluded from the page count. All fold-out pages shall be counted as two pages and shall be numbered as such. Proposals shall be organized and tabbed in the same order as the evaluation criteria.

2. Submittal Letter – (One page maximum) - Each proposal must be accompanied by a submittal letter. Submittal letters that omit any of the following minimum information may be deemed non-responsive. The submittal letter shall identify the Offerors as follows:
   a. Identify the name and title of the person(s) authorized to contractually obligate the offeror for the purpose of this RFP and the contract;
   b. Identify the names, titles, and telephone numbers, fax and e-mail address of persons to be contacted for clarification questions regarding this RFP;
   c. Explicitly indicate acceptance of the Conditions Governing the Procurement stated in Section II of this RFP and acceptance of the Standard Agreement between the Friends and A&E and compliance with all codes, regulations, facilities, standards and requirements on laws that shall apply to this project;
   d. Be signed by a person authorized to contractually obligate the offeror; and
   e. Acknowledge receipt of any and all amendments to this RFP.

IV. INSURANCE

A. ERRORS AND OMISSION INSURANCE

1. Minimum Requirements - Article 11 of the Agreement between Friends and the A&E requires a minimum of $250,000 per occurrence and in the aggregate. Please refer to the Agreement for actual requirements. With this proposal submit a Certificate of Insurance showing current coverage equal to or greater than what is required in this RFP.

V. FINANCIAL INFORMATION

Offerors must submit the following financial information with their proposals:
   - Current (year-to-date) financial statements; and
   - Year-end financial statements and audits for the past five years (ending with the most current full fiscal year used by the offeror)

VI. EVALUATION

A. EVALUATION FACTORS

A brief explanation of each evaluation category is listed below. Information in one category may overlap information in other categories. Offerors are encouraged to address each category completely, as points are assigned for responses to each. Responses to this RFP shall include information and past project experiences specific to the team submitting the proposal.
1. **Specialized Design:** (Recommend 4 pages)
   - Vision/mission and business philosophy.
   - Specific examples of best practices utilized by firm.
   - List all design consultants and how they provide value to this project.
   - Examples of highly successful projects similar to this project, completed by the office submitting this proposal.
   - Firm’s experience with LEED and ability to incorporate energy conserving and sustainable measures into project design.
   - Firm’s approach to project cost estimating and incorporation of Life Cycle Cost Analysis into the design process.

2. **Evidence of Understanding of the Scope of Work** (Recommend 5 pages):
   - Understanding of key project elements/goals.
   - Challenges that might be expected based on type of project, including historic preservation, environmental conditions, project cost estimates, location, site, or other factors.
   - Possible creative management approaches.
   - Please note: Offerors are not to provide specific design solutions. Specific design solutions may actually result in a reduction in scoring in this category. The intent of this section is to give the Offeror an opportunity to express professional observations, based on the scope of work, site visits, and interviews conducted during the preparation of the proposal.

3. **Capacity and Capability** – (Recommend 4 pages)
   - Information regarding project team’s past capability to meet schedules, meet budgets and meet project administration requirements.
   - Indicate relationship of the firm’s/project team’s current work load to the projected workload of this project.
   - Indicate key personnel to be assigned to this project, their specific roles, experience and background.
   - Indicate the relationship of the workload of this project to other current projects.

4. **Past Record of Performance** – (Recommend 5 pages)
   - Information on last five completed design projects to include owner’s project budget, final design cost estimate, bid price including accepted alternates and total number and costs.
   - Information on these projects showing owner’s schedule compared to actual project schedule.
   - Please explain any project difficulties and how the Offeror handled these issues.

5. **Proximity to or Familiarity with Site Location** – (Recommend 2 pages)
   - Provide information relative to the project’s location and how members of the project team can respond to issues at the site.
   - Indicate previous projects completed in the vicinity of this project, including references.
   - Describe your firm’s experience which relates to the project site and how you would approach the special challenges identified in this RFP.

**B. EVALUATION CRITERIA**

A maximum total of 100 points are possible in scoring each proposal for the evaluation. The Source Evaluation Panel will evaluate the proposals and may conduct interviews with Offerors applying for
selection. The evaluation criteria to be used by the Source Evaluation Panel for the proposal review and the corresponding point values for each criterion are as follows:

<table>
<thead>
<tr>
<th>EVALUATION CRITERIA</th>
<th>POINTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Specialized design and technical competence of the business in the area of design for historic structures, museums and/or public visitor centers</td>
<td>30</td>
</tr>
<tr>
<td>2. Evidence of understanding of the scope of work, the site and existing conditions</td>
<td>25</td>
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<tr>
<td>3. Capacity and capability of the business, including any consultants, to perform the work, including any specialized services, within the time limitations</td>
<td>15</td>
</tr>
<tr>
<td>4. Past performance on contracts with government agencies and private industry with respect to such factors as cost control, quality of work and ability to meet schedules</td>
<td>15</td>
</tr>
<tr>
<td>5. Proximity to, or familiarity with, the area in which the project is located</td>
<td>15</td>
</tr>
<tr>
<td>TOTAL</td>
<td>100</td>
</tr>
</tbody>
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