

**REQUEST FOR PROPOSAL**

**ASSISTED LIVING / INDEPENDENT LIVING**

**COTTAGES MASTER PLAN**

**Grand Traverse Pavilions Foundation, Inc.**

Proposal due:

**July 10, 2024**

Issued by:

Grand Traverse Pavilions Foundation, Inc.

Gerard Bodalski,

Grand Traverse Pavilions Foundation Secretary

Grand Traverse Pavilions CEO / Administrator

## **Part I: Proposal Scope of Work and Deliverables**

### **A. Background**

Grand Traverse Pavilions Foundation, Inc., established in 1997, oversees the development and fundraising endeavors of The Pavilions.

Comprised of community leaders, the Grand Traverse Pavilions Foundation is charged with securing support for endowment and annual giving funds, major gift endeavors, memorials, tributes, charitable gift annuities, and special events.

Contributions to the Foundation are directed for programs and services that are not funded by traditional reimbursement. Monies raised, for example, provide assistance for individuals on fixed incomes to access our varied multi-aged programs and services, including overnight respite, rehabilitation, independent living, assisted living and long-term skilled nursing care.

Regardless of ability to pay, Grand Traverse Pavilions Foundation strives to ensure that there is full access to the programs and services of the Pavilions.

### **B. Project: COTTAGES MASTER PLAN**

#### *1. Goals*

Grand Traverse Pavilions Foundation, Inc. (Foundation) seeks a consultant to develop an Assisted Living / Independent Living Cottages Master Plan which will guide the upgrades and renovations of these National Historic Registered Cottages. This RFP is being put forth to engage a qualified architectural / engineering firm to create this plan for the Foundation, at the direction of and with support of Grand Traverse Pavilions staff. The Plan developed through this RFP will assist the foundation to address the following goals related to their facilities:

- a) Improve the aesthetics of the cottages to reclaim their historic beauty.
- b) Upgrade mechanicals and structures for each of the three buildings.
- c) Ensure the cottages are functionally and visually competitive.

#### *2. Support*

Grand Traverse Pavilions CEO will serve as the Project Manager. The CEO will seek to ensure the resources and access necessary to complete this work are available to the selected bidder. This will include documents, introductions, access to buildings and other necessary materials.

#### *3. Engagement*

The Foundation envisions that the process will be developed through meaningful engagement with all parts of the organization. The following is offered as a means of suggesting what such an engagement process would look like.

- a) Weekly meetings with the Project Manager and/or the Project Team to ask questions and discuss project
- b) Meetings with executive leaders of the Grand Traverse Pavilions to understand organizational goals and priorities.

The Foundation welcomes comments on engagement including suggestions on the number and type of meetings as well as comments on project milestones.

#### *4. Deliverables*

The proposal should include two sections. The first section should be an assessment of the three current facilities. The second section should include a recommendation of changes to the facilities and their systems.

The plan and its components should be based upon the information gathered through the engagement process previously discussed, and where possible in consideration of the organizational goals and other planning efforts mentioned within this RFP. Each of these sections is described in greater detail below.

##### a) Summary and Assessment of Current Facilities

The purpose of this section is to document the suitability of existing buildings to meet organizational needs. This section should address how buildings are currently utilized. This section of the proposal should include:

1. An overview and analysis of the current state of the Cottages. This should address the overall condition of the buildings and current use.
2. Major mechanical, foundation, roof, electrical, heat and cooling system improvements or replacements, which would be necessary to keep the current buildings functioning.
3. Renovations needed to improve the usefulness of the building.

The Foundation expects that information necessary to develop section two of the proposal will be provided through interviews with staff, and review of prior reports, plans, and data. Project staff will assist when information is unclear or incomplete. In addition to the documentation developed with the first section of the proposal, the Foundation believes that the below or listed factors will need to be reviewed and considered when developing this second section of the proposal:

1. Regulatory Requirements: Regulatory requirements and mandated services where the Pavilions have an obligation to deliver services.
2. Functional Needs: Space allocation and design supports the function of the assisted living / independent living cottages.

5. *Timeframe*

Delivery of the proposal should occur no later than July 10, 2024. The Foundation intends to use the plan to guide future capital improvement budgets. The Foundation welcomes comments on the timeframe, milestones, and completion. The Foundation will not exclude any proposal based on the estimated timeframe but will consider the project length as a component of the overall proposal.

6. *Plan Costs*

The Foundation shall request a fee recommendation as part of this proposal. Payment for services is anticipated to be based on a not-to-exceed amount.

**Part II: Proposal Submittal Instructions, Format, and Award**

**A. Proposal Definitions**

“Bidder” means an individual or business submitting a proposal to Grand Traverse Pavilions Foundation, Inc.

“Foundation” means Grand Traverse Pavilions Foundation, Inc.

**B. Proposal Schedule**

The expected proposal schedule is listed below. The Foundation reserves the right to change the proposal schedule. If changes are made, bidders will be notified in the form of an addendum to the RFP, emailed directly to all registered bidders.

<b>Proposal Schedule</b>	
June 12, 2024	Issuance of RFP
July 9, 2024	Deadline to submit questions
July 10, 2024	Receipt of proposals
July 17-18, 2024	Proposal interviews
July 19, 2024	Proposal evaluation
July 23, 2024	Proposal selection

**C. Proposal Submittal Instructions**

Proposals are to be submitted in sealed packages **by July 10, 2024, at 4:00 PM.**

***Submittal Address:***

Grand Traverse Pavilions  
Foundation  
Attention: Gerard Bodalski,  
1000 Pavilions Circle  
Traverse City, MI 49684

## D. Proposal Format

Proposals should be prepared simply and economically providing a straightforward, concise description of the ability to meet the requirements of the RFP. All proposals should be presented in the following format:

1. Cover Letter - Introducing the bidder's organization and providing a brief synopsis of their experience in providing the services requested in the RFP.
2. Executive Summary- Briefly outlining the bidder's response to the RFP, their qualifications and other pertinent information which might assist the Foundation in evaluating the proposal.
3. Letter of Transmittal - Containing the following information:
  - a) Company which will be providing the services required in the RFP. A bidder must identify any subcontractors which may be used the tasks or work each subcontractor would be expected to perform, the experience and credentials of each subconsultant; and each subconsultant's legal identity, physical address, telephone number, website, and e-mail address; and the licensures and/or certifications, if any, of each subconsultant's employee who would be expected to provide work on the project.
  - b) Point of contact for RFP clarification or additional information.
  - c) Person authorized to legally obligate the bidder.
  - d) Contact information which must include name, address, phone, and fax or email.
  - e) Statement of no inducement: a statement certifying that no attempt has been made or will be made by the bidder to induce any other person or organization to submit or not to submit a bid with regard to this RFP. Furthermore, this statement must certify that the proposal contained herein is submitted in good faith and not pursuant to any agreement or discussion with, or inducement from, any organization or person to submit a complementary or other non-competitive bid.
  - f) Statement of no investigation/conviction: a statement certifying that the bidder, its affiliates, parent company, subsidiaries, officers, directors, subcontractors, and employees are not currently under investigation by any governmental agency and have not in the last five years been convicted or found liable for any act prohibited by State or Federal law in any jurisdiction, which, involves conspiracy or collusion with respect to bidding or the performance of any public contract.
4. Bidder's Experience -
  - a) Proposals should include a listing of qualifying experience, and similar projects including locations, organization names and the number of years of providing service. Additionally, include the name, address, email, and phone number of the person who served as the primary client contact for the project.

5. Billing Procedures - The bidder should describe their organization's billing procedures.

## **E. Evaluation Criteria**

The Foundation will review all proposals received as part of a documented evaluation process. The proposal evaluation criteria, which the Foundation will develop before the opening of proposals, should be viewed as standards that measure how well a bidder's proposal meets the desired requirements and needs of the Foundation.

The proposals will be reviewed by a selection committee and based upon the selection committee's findings. Thereafter, the selection committee will schedule interviews to be conducted in-person or virtually with one or more bidders that have submitted proposals. Bidders may be requested to provide additional information and appear before the committee for follow-up after the interviews are conducted.

The Foundation reserves the right to accept or reject any or all proposals or portions of proposals, to waive irregularities, and to request written clarification of proposals and supporting materials. The Foundation reserves the right to accept the proposal or portion of proposal they deem is in the best interests of the Foundation after all proposals have been examined and evaluated. Nothing in this RFP shall obligate the Foundation to select a bidder or enter into any agreement with a bidder. No agreement between the Foundation and a bidder shall be binding or enforceable unless it has been reduced to writing and executed by duly authorized officers of each part to any such contract.

## **F. Contract Award**

Contract negotiations will be undertaken with a bidder whose proposal shows them to be best qualified, responsible, and capable of providing the necessary services to the Foundation. The cost of services will also be considered. The Foundation reserves the right to consider proposals or modifications received at any time before award is made, if such action is in the best interest of the Foundation. The contract that may be entered into will be that which is most advantageous to the Foundation's needs and other factors considered. The Foundation is not obligated to consider any requested changes that materially alter the terms of the sample standard consultant contract.

All decisions regarding the award of the contract will ultimately be made by the Foundation.

## **G. Incurring Costs**

The Foundation is not liable for any cost incurred by the bidder prior to the issuance of a contract, including but not limited to costs associated with preparing or submitting proposals, presentations, and interviews.

## H. Inquiries

To maintain fairness in the process, inquiries concerning this RFP, including questions related to technical issues, are directed through email to the following contact:

**Contact:** Gerard Bodalski  
Grand Traverse Pavilions Foundation  
[gbodalski@gtpavilions.org](mailto:gbodalski@gtpavilions.org)

Questions over the phone will not be accepted.

