



Request for Qualifications (RFQ) for Owner's Representative/Project Manager

NWI Thrive Project

Issue Date: January 31, 2025

Deadline for Questions: February 26, 2025, at 3:00 PM Central

Questions may be emailed to: mfishback@legacyfdn.org

Subject Line: "Owner's Rep Q&A" (Questions must be emailed. The project team will not respond to verbal questions/inquiries and/or requests for information via telephone or other forms of oral communication).

Deadline for Proposals: February 27, 2025, at 5:00 PM Central

Interviews with Finalists: Weeks of March 17, 2025 & March 24, 2025

Notification of Award: March 31, 2025

Introduction

Legacy Foundation, in collaboration with the Crown Point Community Foundation, Porter County Community Foundation, and Unity Foundation of La Porte County seek proposals from qualified owner's representatives/project managers to oversee the implementation of the NWI Thrive initiative. This regional project, supported by a \$20 million grant from Lilly Endowment Inc., focuses on enhancing the quality of life in Northwest Indiana through coordinated investments in nature, culture, and wellness.

Project Description

NWI Thrive encompasses a variety of initiatives to connect and enhance Northwest Indiana's natural and cultural assets. The project includes trail and transit improvements, creative placemaking efforts, and educational programming. Project cost for components managed by owner's representative/project manager is \$18,444,000. Owner's Representative/Project Manager will oversee contracting and general requirements, construction, survey & Geotech, and design and engineering for all key initiatives, which include:

- Development of seven (7) Discover Hubs and three (3) trailheads near South Shore train stations in Michigan City, Town of Pines, Beverly Shores, Dune Park, Miller Beach, East Chicago, and Downtown Gary. *Discover Hubs* are placemaking installations that welcome travelers and include public art, interpretive signage, information kiosks, educational opportunities, and wayfinding to local attractions and businesses. *Trailheads* will connect transit hubs to neighboring trail networks, reinforcing a well-connected

lakefront. Both treatments will be reflective of the town's unique culture and offer information about local plants and wildlife.

- Closing 9.5 miles of gaps in existing trail. Trail connections and improvements will ensure Marquette Greenway continuity through the region and prioritize connections within communities. Trail locations include:
 - Cultural Trail Along Pine Street Downtown Michigan City
 - Trail Improvements along Broadway Avenue in Beverly Shores
 - Dunes Kankakee Trail
 - Trail Improvements in Miller Beach in Gary
 - Trail Improvements on Broadway in Gary
 - Marquette Greenway Connections in Gary
 - Indianapolis Boulevard in East Chicago

- Install signage and wayfinding to connect communities with natural and cultural landmarks. Wayfinding signage will be installed:
 - From the new Discover Hub and Trailhead along the Marquette Greenway north along Central Avenue to Central Ave Beach within the national park in the Town of Pines.
 - From the Marquette Trail along Howe Road, Mineral Spring Road, and other nearby streets connecting Bailly Homestead, Chellberg Farm, the Indiana Dunes National Park Headquarters, the Dunes Learning Center, and the Good Fellow Club Youth Camp.
 - The entire length of the Marquette Greenway. A Unified Trail Wayfinding Plan will include welcome signs, vehicular trailheads, map kiosks, pedestrian directional signs, pedestrian regulatory signs, and mile markers.

NWI Thrive incorporates educational opportunities throughout all projects listed above. With a focus on increasing local understanding, appreciation, and stewardship of the region's local wildlife and habitats, our creative placemaking efforts support educational outcomes that will further protect Northwest Indiana's natural areas and resources. Public outreach events will be planned to draw the public to utilize the trail corridor.

The implementation timeline spans five years, with a focus on stakeholder engagement, fiscal oversight, and ensuring timely completion of deliverables.

Project Roles and Partner Responsibilities

Legacy Foundation will oversee and administer the funding and contract management for the projects defined in this proposal. A Project Task Force, made up of representatives from each of the community foundations and other project partners, will be formed to review projects and provide project management oversight.

Key Collaborators:

- **NWI Forum** will serve on the Project Task Force and ensure community engagement is incorporated into all phases of implementation across project categories.
- **Northwestern Indiana Regional Planning Commission (NIRPC)** will provide leadership on the Unified Trail Wayfinding Plan.
- **Northwest Indiana Commuter Transportation District (NICTD)** will provide space for Discover Hubs at seven (7) South Shore Line stations and is a regulatory/jurisdictional partner for some trailhead projects.
- **National Park Service (NPS)** will leverage funding to support the implementation of NWI Thrive and is a regulatory/jurisdictional partner for some trail connections and wayfinding projects.
- **Save the Dunes** will be co-leading the Educational Campaign project.
- **Dunes Learning Center** will be co-leading the Educational Campaign project.
- **Calumet Heritage Partnership (CHP)** will be co-leading the Educational Campaign project.

Owners Representative/Project Manager Duties and Responsibilities

The selected Owner's Representative/Project Manager will work directly with Legacy Foundation, and the Project Task Force, and will be responsible for day-to-day project management of the overall grant throughout all phases of the planning, design, construction, and closeout services of the project. They will oversee all funding, contracts, consultants, schedules, construction projects, design and engineering projects, and locally led projects.

Responsibilities will include:

1. **Develop and Review RFQs & Contracts:** Assist Legacy Foundation and the Project Task Force in the development, review, and approval of necessary construction management and design team RFQs and contracts for all projects.
2. **Coordinate Stakeholders:** Work closely with the Project Task Force, municipalities, community organizations, and other implementation partners. Attend regular project meetings, present materials and project updates, and facilitate discussions between Legacy Foundation and Design-Construction Team. This individual will serve as the primary point of contact for contractors and coordinate all parties to move the project forward expeditiously.
3. **Oversee Implementation:** Create and manage Program schedules for Project and sub-projects. Review and approve submittals for consultants, contractors, and sub-contractors and manage work to ensure projects meet design, budget, and timeline requirements. Perform regular site inspections to verify quality and adherence to plans. Advise the Legacy Foundation on issues including construction costs, schedule, coordination, and owner occupancy. Notify Legacy Foundation if there is a deviation from project progress.
4. **Financial Oversight:** Create and manage Program budgets for Project and sub-projects. Provide monthly reports on expenditures, change management, and ensure compliance with grant requirements.

5. **Public Engagement:** Support the development and execution of public outreach campaigns to maintain transparency and community involvement. Ensure proper permitting and licensing for Projects are procured.
6. **Documentation:** Provide monthly progress reports to Legacy Foundation and partner organizations. Develop meeting minutes and other project documentation, when necessary.
7. **Risk Management:** Identify potential risks and develop mitigation strategies to ensure project success.
8. **Project Closeout:** Assist Legacy Foundation in obtaining any necessary final inspections and prepare post-construction project summary reports with key project milestones, budget tracking, and lessons learned. Work with Legacy Foundation to complete necessary grant reporting requirements.

Minimum Qualifications

- Proven experience managing large-scale regional infrastructure or placemaking projects.
- Demonstrated ability to coordinate with diverse stakeholders, including public agencies, nonprofits, and community groups.
- Strong financial management skills with experience handling multi-million-dollar budgets.
- Expertise in project management, cost control, scheduling, and risk mitigation.
- Proficient in construction documents review and quality assurance processes.
- Excellent organizational, communication, and negotiation skills.
- Familiarity with the Northwest Indiana region and its unique natural, cultural, and economic landscape is preferred.
- The ability to work constructively with a wide variety of people in both a field construction and office environment.
- Possess all necessary licenses and authorizations to perform work in the State of Indiana.
- The selected Owner's Representative/Project Manager for this RFQ cannot self-perform any design, construction or consulting scope of this Project.

Selection Process

Legacy Foundation will select a number of finalists based on the number of qualifying submissions. Finalists will be invited to participate in a follow-up interview to discuss their approach to the project in more detail. Legacy Foundation reserves the right to conduct reference checks and experience verification as part of the selection process.

Proposal Requirements

Those interested should submit the following information via PDF by 5:00 PM Central on February 27, 2025, to mfishback@legacyfdn.org. Documents received after this time will not be considered. Please organize your PDF in the order listed below. If your file size is too large to email directly, please send a link to the file via Google Drive or Dropbox.

1. **Cover Letter:** Please include company name, address of corporate headquarters, address of nearest local office, contact name for response, and that person's contact information. This letter should introduce your organization and briefly outline experience, qualifications, and approach.
2. **Project Team:** Identify key personnel and their roles. Include one-page resumes highlighting relevant experience. If a partner firm or sub-consultant will be used, explain each entity's role and how the partnership will be managed throughout the project.
3. **Experience and Qualifications:** Provide a statement of experience discussing past performance, capabilities, and qualifications. Explain how your organization is a suitable partner for this project. Identify and provide details of at least three (3) similar projects successfully completed as an Owner's Representative or Project Manager in the last five (5) years. For each project, list title, client, construction cost, construction company, and brief description.
4. **Proposed Approach:** Outline your strategy for fulfilling the scope of work, including methods for stakeholder engagement, project management, and risk mitigation.
5. **Budget Proposal:** A clear and concise breakdown of the proposed fees and payment schedule anticipated for Owner's Representative/Project Manager services. Provide a lump sum with fixed fees and a "not to exceed" reimbursable amount. The fee is to include all staff and direct personnel expense rates for the proposed Owner's Representative. Reimbursables are to include all actual expenditures made by the firm's employees and consultants in the interest of the project which will be necessary to perform the scope of work required. **The Owner's Representative/Project Manager budget shall not exceed a total of \$356,000 (equivalent to 1.9% of the total project budget).**
6. **Schedule:** The goal is to begin phase 1 of each project by Q3 2025, with construction and implementation of all projects beginning by Q1 2027 and complete all projects by December 2029.
7. **Insurance:** Submit a valid certificate of insurance showing all policies, including but not limited to General Liability, Professional Liability, Worker's Comp, Cyber Liability, Automobile, etc. Minimum General Liability limits and coverage requirement: \$5 million minimum limit per incident, \$10 million aggregate.
8. **References:** Provide a minimum of three (3) references, including contact information, from contracts or partnerships.
9. **Equal Opportunity Commitment:** Provide history of contracting with or hiring minority business enterprises and women business enterprises.