

SECTION I FEDERAL FUNDING ACCOUNTABILITY AND TRANSPARENCY ACT (FFATA)

Institution Name: Click or tap here to enter text.

Program Director / Principal Investigator Name: Click or tap here to enter text.

Is the Tribe exempt from FFATA Reporting Highest Compensated Officers? ☒ Yes or ☐ No

If no, please complete the section below:

Highest Compensated Officers

The names and total compensation of the five most highly compensated officers of the entity(ies) must be listed if the entity in the preceding fiscal year received 80 percent or more of its annual gross revenues in Federal awards; and \$25,000,000 or more in annual gross revenues from Federal awards; and the public does not have access to this information about the compensation of the senior executives of the entity through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. §§ 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986. See FFATA § 2(b)(1) Internal Revenue Code of 1986.

Officer 1 Name: Click or tap here to enter text.

Officer 1 Compensation: Click or tap here to enter text.

Officer 2 Name: Click or tap here to enter text.

Officer 2 Compensation: Click or tap here to enter text.

Officer 3 Name: Click or tap here to enter text.

Officer 3 Compensation: Click or tap here to enter text.

Officer 4 Name: Click or tap here to enter text.

Officer 4 Compensation: Click or tap here to enter text.

Officer 5 Name: Click or tap here to enter text.

Officer 5 Compensation: Click or tap here to enter text.

If this Agreement is subject to FFATA reporting, the Tribe will provide a scope of work or project description (up to 4,000 characters) that meets federal reporting requirements.

Click or tap here to enter text.

[END OF SECTION I, FFATA]

Section 1 - Introduction

The Puyallup Tribe of Indians (Puyallup Tribe or Tribe) is requesting proposals for Owner's Representative / Project Manager (OR/PM) Services to complete a design and construction project located on the Puyallup Indian Reservation in Fife, WA. The selected OR/PM will lead and coordinate the Puyallup Tribe's participation in the Portland Area Regional Specialty Referral Center Demonstration Project. With support from the OR/PM, the Puyallup Tribe, will provide facility design, construction, equipment, furnishings, and commissioning for the project. The project is undertaken in conjunction with the Northwest Portland Area Indian Health Board (NPAIHB) and the Indian Health Service (IHS).

Section 2 – Project Background and Description

The Puyallup Tribe, through the Puyallup Tribal Health Authority, is leading the design and construction of the Portland Area Regional Specialty Referral Center Network - Northwest Region Demonstration Project. The Puyallup Tribe's vision is to create a facility that offers comprehensive, accessible, and culturally grounded specialty health care for IHS eligible people throughout the region. The completed facilities and provided furnishings and equipment will be turned over to the Indian Health Service (IHS) who will own and operate the completed facilities. The IHS is a federal agency responsible for providing healthcare services to American Indian and Alaska Native (AI/AN) people. Through a separate agreement, IHS will lease the land for the facility from the Puyallup Tribe. The OR/PM will be under the sole direction of Puyallup Tribe.

This project has many unique aspects and attributes. It is an *Indian Health Care Delivery Demonstration Project* to construct the first stand-alone outpatient regional specialty care referral center in the Indian Health Service system. The facility will serve the entire IHS Portland Area (comprised of ID, OR, and WA) and expand access to specialty care for all Tribes and Urban Indian Health Programs located in the region. This demonstration project is the first in a planned network of three regional specialty referral centers serving the IHS Portland Area. Other IHS regions are also interested in establishing standalone regional specialty care facilities. As a demonstration project, IHS plans to evaluate this facility's operation and utilize the data to establish planning criteria for future regional specialty care referral centers.

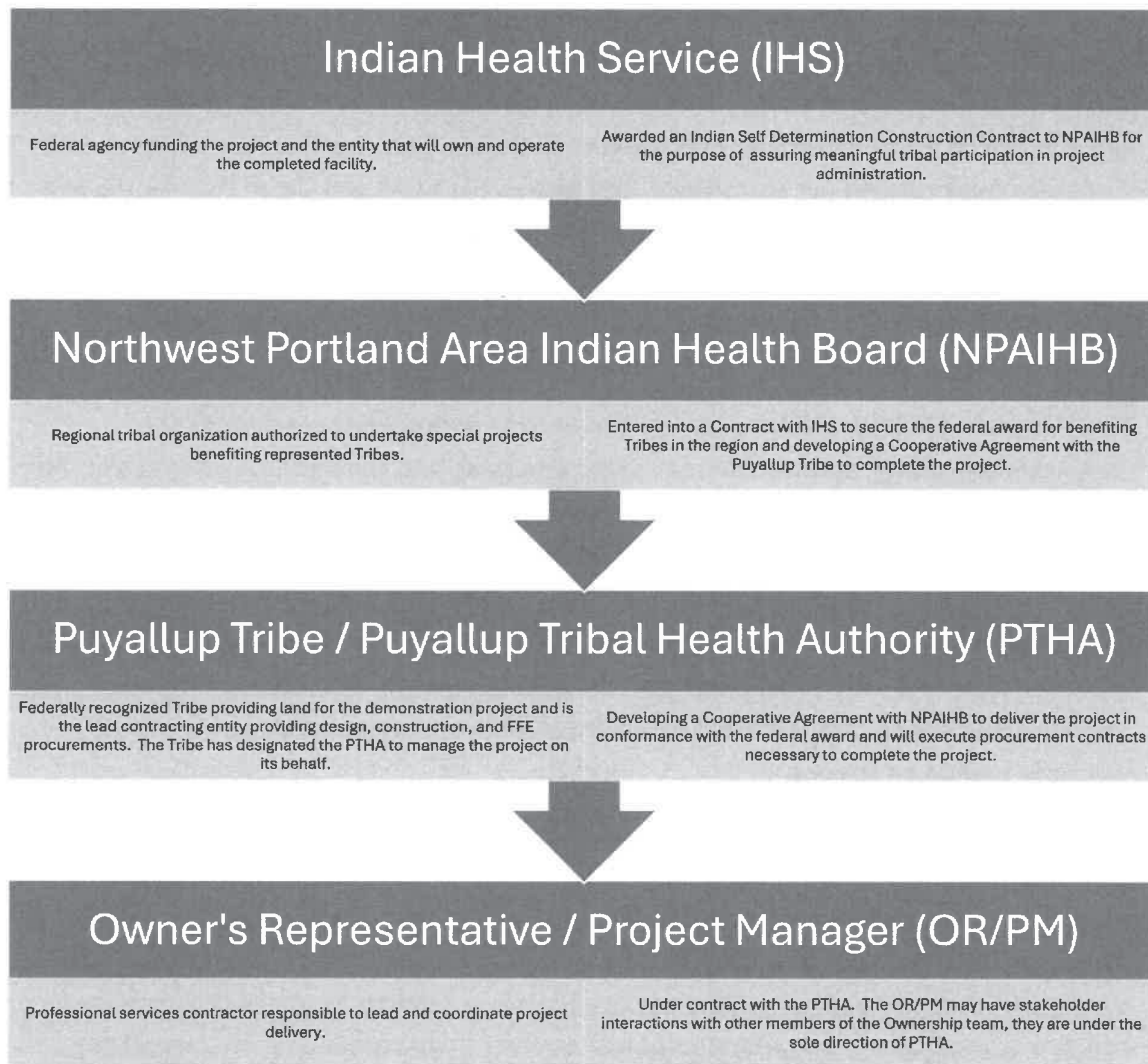
The proposed project is described in the attached Program of Requirements (POR) (Attachment A). The project site is on the Puyallup Indian Reservation in Fife, WA. The

Puyallup Tribe owns the property and has jurisdiction over the project site. The facility space program consists of an approximately 186,000 sf specialty care facility and a parking garage with at least 737 parking spaces. Coordination with the City of Fife will be necessary regarding improvements to adjacent utilities and roadway access points under their jurisdiction. There are also several planned improvements adjacent to the site including The Tacoma Dome Link Extension (regional light rail, spuyaləpabš Trail (shared-use path), and Cappa Park (future city park). The Puyallup Tribe owns and operates an existing facility on the project site that includes specialty healthcare services. Discussions are ongoing between IHS and the Puyallup Tribe regarding specialty care coordination. The outcome of the discussions may require revisions to the space program presented in the attached POR.

The IHS made \$273M available to complete all aspects of the project, including the administration, design, construction, equipping, furnishing, and commissioning the facility. For context, this amount differs from what is presented in the POR because additional funds were added after the document was finalized. Based on the latest IHS planning level budget estimate, approximately \$320M is needed for the complete project. The OR/PM will assist with evaluating and adjusting the space program and parking garage size early in the design process to assure alignment within available project funds, to account for specialty care service coordination between IHS and the Puyallup Tribe, and to assure adequate parking for all functions located on the site.

IHS is providing the project funding through an Indian Self Determination Construction Contract with the Northwest Portland Area Indian Health Board (NPAIHB). The NPAIHB is a regional tribal organization representing all 43 federally recognized Indian Tribes in Idaho, Oregon and Washington. The NPAIHB mission is to eliminate health disparities and improve the quality of life of American Indians and Alaska Natives (AI/AN) by supporting Northwest Tribes in the delivery of culturally appropriate and high-quality healthcare. The NPAIHB by-laws allow for the undertaking of special projects to improve the health delivery system for all AI/AN people in the Northwest and to increase Indian healthcare providers in the Northwest. The NPAIHB is responsible for assuring the project is carried out consistently with the terms of the IHS contract. NPAIHB will play a lead role in requesting and negotiating any modifications needed to the IHS contract. This may become necessary if deviations from the federal award are proposed during design and construction. The Puyallup Tribe and NPAIHB are developing a Cooperative Agreement that will establish a framework to deliver the project in conformance with the IHS Indian Self Determination Construction Contract.

Fig. x Project Ownership Relationships



Section 3 – Point of Contact for RFP Questions and Submissions

Submit written questions regarding this RFP and final proposals to the individual(s) below. Questions received and the associated responses will be provided to all perspective proposers who have notified the PTHA of their intent to submit a response to this RFP.

Ryan Gilbert, Deputy Executive Director

Email: rgilbert@eptha.com

Phone: 253-593-0232 Ext. 7934

Section 4 – Proposal Evaluation and Award

The evaluation and award determination will be accomplished in two steps. First the Puyallup Tribe will evaluate and rank all technical proposals meeting the minimum requirements utilizing the technical evaluation criteria described below. Second, the three firms providing the highest ranked technical proposals will be invited to participate in an interview and to provide a price proposal. The Puyallup Tribe will make the contract award to the responsible proposer whose technical proposal, cost proposal, and other factors considered are the most advantageous to the Puyallup Tribe, provided that the price is within the total amount available for this activity

1. Minimum Requirements – Offerors must meet the following minimum requirements for their proposals to be considered.

- a. Eligible to be awarded a federally funded contract.
- b. Minimum of five years of experience providing owner's representative / project management services.
- c. Offeror's proposal addresses all technical criteria requested in this RFP.

2. Technical Proposal - The proposer shall provide a 10-pg maximum technical proposal that presents information relating to the technical evaluation criteria described below. The technical proposal may include additional attachments beyond the 10-pg maximum that are limited to resume(s) of assigned representative(s) (single page preferred), descriptions of past projects (single page per project preferred), and any other highly relevant information pertaining to the proposal. The Puyallup Tribe will convene a review board to review and rank technical proposals. Each reviewer may award a maximum of 100 rating points based on their evaluation of the offeror's technical proposal on the criteria described below. The average score across all reviewers will determine the offeror's technical proposal score.

- a. Company Overview and Capability – The overall capability of the company to provide the OR/PM services necessary to successfully complete the project. If the proposal involves a partnership or the use of subcontracts, provide an overview of each company involved and describe the role each will play. (Max of 10 Rating Points)

- b. General Experience – The level and relevance of prior experiences of the OR/PM representative(s) who will be substantially involved with the project. General experience may include, but is not limited to, administering procurements and coordinating project teams on construction projects of similar size and complexity. (Max of 10 Rating Points)
- c. Specialized Experience – The level and relevance of prior specialized experiences of the OR/PM representative(s) who will be substantially involved with the project. Specialized experiences relate to the more unique aspects of this project. Examples include experience with federally funded projects, with Tribes and tribal communities, with healthcare facilities construction projects, with the Seattle/Tacoma, WA design and construction marketplace, with vertical building and parking garage construction, or other specialized experiences of direct relevance to this project. (Max of 30 Rating Points)
- d. Technical Approach – The approach will be evaluated for the overall understanding of the project requirements and anticipated effectiveness in meeting this project's requirements, protecting the Puyallup Tribe's interests, and assuring positive project outcomes for the project ownership team. (Max of 20 Rating Points)
- e. References – Overall level of satisfaction owners have experienced on past projects completed by the Offeror. Greater emphasis will be placed on references for projects that align with this project in terms of size, complexity, and scope. (Max of 10 Rating Points)
- f. Indian Preference – In accordance with the Puyallup Tribe's Indian preference in contracting policy, additional points may be awarded as follows:
 - i. The level and extent the proposal demonstrates meaningful involvement by an Indian owned Contractor and/or Subcontractors in the provision of services under this contract. (Max 15 Rating Points)

- ii. The level and extent the offeror provides employment and/or training opportunities for Indians. (Max 5 Rating Points)
3. Interview and Cost Proposal – Upon completion of the Technical Proposal evaluations, the Puyallup Tribe will invite the top three ranked firms to participate in the second step of the process. This will consist of an interview with the Technical Review Committee and a request to provide a cost proposal. Specific instructions on interview preparation and requirements for submitting a cost proposal will be provided to the selected firms at that time. Information gathered during interviews may be utilized to refine the proposer's technical proposal score and to update the scope of work that proposers will use to develop their cost proposal.
4. Final Proposal Ranking - The results of the technical proposal ranking and cost proposal will both be utilized to rank order proposals based on the lowest cost per technical rating point as follows:

$$\text{Cost Proposal} / \text{Total Technical Rating Points} = \$/\text{Rating Point}$$

The offeror with the lowest \$/Rating Point would be ranked first, the offeror with the second lowest \$/Rating Point would be ranked second and so on. Contract award will be made to the first ranked firm.

5. Negotiations - The Puyallup Tribe, dependent on the outcome of proposal evaluations, reserves the right to conduct negotiations with the top ranked proposer. This may become necessary under circumstances where the most highly ranked proposals are relatively close in value making it unclear which proposal is most advantageous to the Puyallup Tribe. If conducted, the purpose of negotiations will be to seek clarification and advise offerors of any noted deficiencies in their proposals, and to assure full understanding and conformance to the solicitation requirements. A common deadline will be established by the Puyallup Tribe for receipt of proposal revisions based on negotiations. Revised proposals will be reevaluated based on the criteria established to arrive at a final award determination. During negotiations, Offerors will not be directed to reduce their proposed prices to a specific amount to be considered for an award.

Section 5 – Owner's Representative / Project Manager Scope of Work

The scope of services to be provided under the awarded contract encompass all necessary activities typically associated with OR/PM work in order to complete the entire project. The

OR/PM will be responsible for project communications, project team coordination, contract administration, schedule management, budget management, scope management (includes assigning and balancing project scope assignments across the procurement contracts), quality assurance, and reporting. This OR/PM scope of work highlights the general requirements and aspects of this project that may be unique. It does not specifically include and describe all OR/PM activities professionally necessary to effectively complete the project.

1. General Project Services – These services are generally applicable to all phases of work under this contract.
 - a. OR/PM will have primary management responsibility in initiating, leading, managing, and coordinating all aspects of project delivery and assuring all work carried out in compliance with the Puyallup Tribe's responsibilities under the Cooperative Agreement and all applicable laws and regulations.
 - b. OR/PM will provide an online project document management system that will serve as a platform for coordinating project activity among the project team and preserve project records.
 - c. OR/PM will plan, schedule, attend, and document project meetings with a wide range of project partners and stakeholders as necessary to develop a strong project team and clear communication as necessary for the execution and completion of the project.
 - d. The OR/PM will appoint a representative to the IHS Project Leadership Team (PLT). The PLT meets monthly and consists of Project Owner's Team representatives. The PLT's primary focus is the administration and execution of the Self Determination Construction Contract between IHS and NPAIHB. The OR/PM will provide brief status updates and answer questions about the project. This PLT meeting provides the opportunity for the OR/PM to plan and coordinate activities requiring IHS involvement such as design submittal review, FFE selection preferences, and property transfer documentation. The NPAIHB is responsible for the facilitation and documentation of the PLT meetings and to assist with facilitating IHS involvement when required.
 - e. OR/PM will provide regular written project status reports to assure the Puyallup Tribe's key personnel and project partners authorized by the Puyallup Tribe are

apprised of project progress. This includes developing a status report format for the Puyallup Tribe's approval and providing regular project status reports to the Puyallup Tribe and other stakeholders authorized by the Puyallup Tribe. The status report will minimally include work status, schedule status, budget status, and action items requiring attention. The Puyallup Tribe anticipates project status reports will initially be required monthly. Once construction begins reporting will be required weekly. Additionally, the OR/PM will develop and provide project status reports required under the Cooperative Agreement for meeting requirements under the IHS Contract.

- f. OR/PM will coordinate and manage contracts executed by the Puyallup Tribe to complete the project. This work includes developing contract solicitation packages, managing contractor selection processes, making award recommendations, assuring required insurance and bonding are in place, monitoring contract execution, assessing work for contract compliance, making contract payment recommendations, evaluating the need and cost of contract modifications, evaluating and monitoring contract costs for project budget compliance, maintaining all contract related documentation, and all other work associated with successfully administering contracts. Anticipated contracts for project delivery include the following and may be adjusted as agreed to when developing the Project Management and Procurement Plan under Phase I, described below.
 - i. Architect and engineering (A&E) design
 - ii. Independent construction cost estimating
 - iii. Facility commissioning
 - iv. Facility construction (may include a design/build contract or other delivery variations)
 - v. Construction inspection / observation
 - vi. Construction contract administration (as defined in the IHS A/E Design Guide)

- vii. Furniture, fixtures, and equipment (FF&E) procurement, storage, and installation.
 - viii. Medical equipment procurement, storage, and installation.
 - ix. Cultural Arts
- g. OR/PM will provide proactive risk management and problem resolution throughout the project to assure successful outcomes and limit project liabilities for the Puyallup Tribe, NPAIHB, and IHS.

PHASE I – The initial contract award will consist of developing a Project Management and Procurement Plan as described below. The Puyallup Tribe anticipates awarding Phase II upon final acceptance of the Project Management and Procurement Plan and finalization of the project's Cooperative Agreement.

2. Project Management and Procurement Plan –

- a. The OR/PM will review historical project documentation and become familiar with completed project planning work and the project stakeholder groups. Documents to be reviewed include:
 - i. IHS Phase I Site Selection Evaluation Report
 - ii. IHS Program Justification Document
 - iii. IHS Program of Requirements (included with RFP)
 - iv. IHS Phase II Site Selection Evaluation Report. Includes
 - 1. Site soils evaluation
 - 2. Site survey
 - 3. Environmental assessment
 - 4. Traffic study
 - v. IHS Architect / Engineer Design Guide
 - vi. Project Cooperative Agreement (Draft)
 - vii. Indian Self Determination Construction Contract
 - viii. Puyallup Tribe of Indians Procurement Manual
 - ix. City of Fife published plans impacting the project area.

- x. Sound Transit Tacoma Dome Link Extension proposal for the project area
 - xi. Puyallup Tribal Health Authority project plans for the site
 - xii. Laws and regulations relevant to the project work
 - xiii. Any other relevant documents that may be identified.
- b. OR/PM will develop questions and preliminary project recommendations based on the document review for discussion with the Puyallup Tribe and NPAIHB representatives. Preliminary recommendations will include approach to project delivery, sequence of contracts, and discussion of pros and cons of various project delivery approaches such as design build, construction manager at risk, design-bid-build, and other variations the OR/PM may recommend.
- c. OR/PM will utilize feedback from the Puyallup Tribe and NPAIHB to develop the Project Management and Procurement Plan detailing how the OR/PM will manage and deliver the project. The OR/PM may propose a format/outline for the Puyallup Tribe's consideration. The purpose of the plan is to establish a clear upfront understanding of the project delivery approaches. The plan will provide:
 - i. Project management plan covering overall project communication/coordination, cost control/financial management, documentation/reporting, contractor performance monitoring, and schedule management.
 - ii. Project owner's risk mitigation plan to include insurance recommendations, approaches to assure a quality outcome, and practices to minimize contractor claim potential.
 - iii. A description of the planned procurement contracts:
 - 1. Contract name with brief scope description
 - 2. Initial budget associated with the contract
 - 3. Approach for advertising and generating competition
 - 4. Any special considerations for the contract applicable to meeting tribal and federal contracting requirements.

5. Approach for pre-proposal conferences, if necessary.
 6. Strategy for evaluating contractor responses and reaching an award determination, including any needed evaluation criteria and selection boards.
 7. Source of independent cost estimate for pricing evaluation.
 8. Source of contract boiler plate documents
 9. Description of contract price and payment methodology
 10. Quality assurance strategy describing how contractor work will be reviewed, assessed, and documented for contract compliance.
 11. Risk factors and mitigation strategies associated with the procurement.
 12. Milestone schedule that includes timeline for advertisement, award evaluation, performance, and closeout.
- iv. Additional aspects or considerations the OR/PM identifies as important to delivering a successful project.

PHASE II – This following work consists of the project execution work and shall proceed in accordance with the Cooperative Agreement, this Scope of Work, and the approved Project Management and Procurement Plan. The Puyallup Tribe anticipates this portion of the contract will be awarded and authorized to proceed upon approval of the Project Management and Procurement Plan.

3. Project Design Phase – The project design phase consists of initiating, awarding, and managing multiple procurements to achieve the complete design and permitting of the project as well as establishing the construction contractor. The majority of the project team is established during this stage. Multiple stakeholder meetings will be held as necessary to receive and integrate feedback into it into the facility design and gain required approvals from the Puyallup Tribe, IHS, and any other permitting authorities.
 - a. IHS A/E Design Guide – The OR/PM will adapt and integrate this document as appropriate into consulting contracts along with specific tribal requirements. This is IHS' standard design requirements document and the Self Determination Construction Contract requires its use. The document establishes A/E responsibilities, members of the design team, the content of design submittals,

and IHS facility design requirements. The document is written for incorporation into a federal contract. Clarifications will need to be developed for integration into a tribal contract.

- b. Scope and Budget Alignment / Project Phase Planning – The Project Owner’s team recognizes the planned space program likely needs to be reduced to accomplish a complete project within the available funds. The OR/PM shall integrate progressive cost estimating into the design development process and facilitate decisions necessary to align the project scope with the available funds. The parties would like to address the project funding shortfall through strategic project phasing. This project (Phase I) will optimize the portion of the planned space program that can be accomplished with the available funds. The remainder of the space program will be deferred to a future project (Phase II) subject to identifying additional funds. The Program of Requirements includes a Technical Memorandum (REF: TAB J) that outlines a project phasing approach that can be used as a starting point for these discussions. The information in TAB J includes a list of departments that can be considered for deferring to a second project phase. This project’s design process shall determine if the second phase will be accomplished on this project site, or if a new site will need to be identified in the future.
4. Project Construction Phase – This phase begins at the onset of construction activity and includes ongoing administration of awarded and active contracts, day-to-day observation/assessment of construction activity, the initiating, awarding, managing of procurements to providing furnishings and equipment, and providing the required documentation for IHS ownership acceptance of the real and personal property provided by the project.
- a. Prior to construction starting, the OR/PM will develop a quality assurance summary describing the project roles and responsibilities across the project team for construction inspections, reviews, and reports. The summary should cover topics such as submittal review and approval, assuring approved materials and products are utilized, site safety is maintained, environmental regulations are adhered to, required special inspections are completed and documented, completed construction is assessed for contract compliance, general contractor

reports are regularly provided, design consultant inspections are scheduled and documented, facility commissioning is carried out and documented, construction record drawings are accurate and available, and any other project quality activities the OR/PM will implement and monitor.

- b. The OR/PM will maintain a regular presence at the construction site to monitor activity for compliance with contract requirements, assess and facilitate solutions to problems that could significantly hinder timely construction performance, and provide informed reports to the Puyallup Tribe on work performance and progress. The presence should be daily during high levels of activity and during higher risk activity. This work will be augmented by a separate construction observation/inspection contract executed by the Puyallup Tribe.
 - c. The OR/PM will develop special contract requirements as necessary for fixture, furnishing, equipment, and medical equipment procurements to assure:
 - i. Input from IHS representatives on preferences for selections is obtained
 - ii. Secure tracking and storage of all project procured property until transfer of ownership to IHS
 - iii. Required data is provided for IHS to assume ownership and tracking responsibility of project procured furnishings and equipment.
5. Project Closeout – This phase begins when both substantial completion has been achieved and IHS and the Puyallup Tribe have determined the facility is acceptable for beneficial occupancy. This phase consists of assuring all punch list items are addressed and ongoing coordination to resolve emergent issues covered by the project's 1-yr warranty. This phase ends with the completion of a warranty inspection and resolution of identified items. The OR/PM will:
- a. Facilitate information necessary to achieve substantial completion and for IHS to assume ownership of the facility and equipment under the terms of the Cooperative Agreement.

- b. Coordinate final commissioning and final inspection activities, assuring parties have met all contract requirements.
- c. Verify provision of Project Close-Out Services including, but not limited to, provision of facility maintenance staff training, submittal of operation and maintenance materials, procedures, warranties, facility record (as-built) drawings, and all other contract required facility records.
- d. Confirm completion and obtain documentation of the facility's LEED certification.
- e. Coordinate and assure the provision of Post-Occupancy Services including, but not limited to, assuring issues related to the project's 1-yr warranty are addressed by the appropriate party and assuring the Warranty Inspection takes place 9-months into the warranty period and associated findings are addressed.

Section 6 – Initial Project Schedule

The following is the estimated project schedule based on the federal award. The Puyallup Tribe is interested in working with the OR/PM to develop strategies that will shorten the timeline when developing the Project Management and Procurement Plan.

Elapsed Time (Months)	Milestone
0	OR/PM Phase I Award
2	Project Management and Procurement Plan Completed
3	OR/PM Phase II Award / Initiate Design Phase
21	Design Complete / Initiate Construction Phase
51	Construction Complete / Initiate Close-Out Phase
60	Anniversary Inspection
63	Project Complete

Section 7 – Applicable Law and Federal Funding Requirements

This project is funded under the Indian Self-Determination and Education Assistance Act (ISDEAA). As a result, the selected firm will be responsible for identifying and ensuring compliance with applicable Federal laws, regulations, and Executive Orders, and Tribal laws, regulations, policies, and rules, including but not limited to:

- The Indian Preference provisions of section 7(b) of the Indian Self-Determination and Education Assistance Act (25 U.S.C. 5307(b), which provides that, to the greatest extent feasible (1) preference and opportunities for training and employment shall be given to Indians, and (2) preference in the award of contracts and subcontracts shall be given to Indian organizations and Indian-owned economic enterprises;
- The laws, regulations, policies, and rules of the Puyallup Tribe;
- Applicable federal regulations, including but not limited to 2 CFR Part 200 regulations and 25 CFR Part 900 regulations;
- The Puyallup Tribe's Procurement Manual;
- National Environmental Policy Act (NEPA) compliance requirements applicable to this award; and
- Such other federal laws, regulations, and Executive Orders as may be applicable.

The selected firm will be required to enter into a contract that requires compliance with these applicable Federal and Tribal laws, regulations, policies, Executive Orders, and rules.

Section 8 – Cost Proposal

The three firms with the highest rated technical proposals will receive detailed instructions for preparing and submitting a cost proposal.

Attachment A.

Program of Requirements

Indian Health Service

Portland Area Regional Specialty Referral Center Network

Northwest Region Demonstration Project

Fife, WA

Project No. PO4PO750C0