

**REQUEST FOR PROPOSALS (RFP)**  
**Preparation of a Feasibility Study for National Heritage Area Designation**  
**for the Upper Missouri River Area**

Upper Missouri River Heritage Area Planning Corporation, Inc.  
PO Box 1323  
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Tel. (406) 454-6814, Chairman Jane Weber

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## INTRODUCTION

The Upper Missouri River Heritage Area Planning Corporation, Inc. (UMRHAPC) is seeking qualified consultants to prepare a Feasibility Study in compliance with National Park Service (NPS) standards to demonstrate to Congress the national significance of the Upper Missouri River Area landscape and its worthiness for designation as a National Heritage Area (NHA). Information about the Corporation can be found at [www.greatfallsmt.net/planning](http://www.greatfallsmt.net/planning), then click on *Heritage Area Planning Corporation*.

The successful contractor(s) shall be responsible for working under the direction of the UMRHAPC, a not-for-profit and all-volunteer organization. Additionally, the contractor(s) shall coordinate with partners from the City of Great Falls Planning and Community Development and GIS Departments; and other entities as appropriate such as: the USDA Forest Service, National Park Service and other federal agencies, Great Falls/Cascade County Historic Preservation Advisory Commission, Monarch-Neihart Historical Group, Inc., the Sun River Valley Historical Society and regional Indian tribes.

- A. UMRHAPC Mission.** The mission of the Upper Missouri River Heritage Area Planning Corporation, Inc. is as follows, *“We exist to tell the Upper Missouri River story. We formed to initiate a collaborative effort to establish a National Heritage Area because we believe in the national significance of the Upper Missouri River heritage, in the power of partnerships, and that National Heritage designation will bring vitality and sustainable economic development to our region. We are residents, multigenerational landowners, local businesses, and cultural organizations. We believe in private property rights, celebrating our history, honoring our legacy and sharing our stories with others.”*
- B. UMRHAPC Themes.** The UMRHAPC has identified six themes to interpret and promote within the Upper Missouri River Heritage Area. Subthemes within each of these major themes are included in Addendum 2 of this RFP.
- **Theme 1: Ice Age/American Indians.** The geological and ecological history of this land shaped early people’s adaptation to and use of the Upper Missouri Region.
  - **Theme 2: Exploration and Settlement.** The Upper Missouri River was crucial for the exploration, settlement and development of northcentral Montana.
  - **Theme 3: Transportation.** Transportation opportunities on and along the Upper Missouri River and its tributaries initiated the use of resources of the region, the exploration, and settlement of Montana and the Northwest.
  - **Theme 4: Military.** From Native Warriors and Buffalo Soldiers to Space Age National Defense, the Upper Missouri River Heritage Area has experienced conflict and played a major role in our nation’s defense.
  - **Theme 5: Industry and Agriculture.** From the first people through the ages, the Upper Missouri River and its tributaries have supported and powered industry and agriculture.
  - **Theme 6: Art and Culture.** The landscapes and cultures of the Upper Missouri River region continue to inspire artists and storytellers.
- C. UMRHAPC Proposed Boundary.** A preliminary boundary for the Upper Missouri River Heritage Area has been defined as the Missouri River corridor from the Gates of the Mountains to Fort Benton, including the connecting tributaries of Belt Creek to the Kings Hill Divide; the Sun River to Fort Shaw, and the Smith River to Eden Bridge. The major communities include Fort Benton, Great Falls, Ulm, Cascade, Belt, Monarch,

Neihart, Vaughn, Sun River, and Fort Shaw. Four National Historic Landmarks are presently within the proposed boundary: First Peoples Buffalo Jump, Fort Benton Historic District, Great Falls Portage and CM Russell House and Studio.

**D. Purpose and Description of Services.** The Upper Missouri River Heritage Area is a geographically unique landscape. Spectacular open horizons plunge into deep ravines and canyons where the Missouri River carved its path through the prairie; histories of First Peoples; and stories of historic steamboat trips and harrowing exploration escapades leap from the pages of leather-bound journals. Central Montana exemplifies the real west and captivates the imagination of archaeologists, anthropologists, historians, geologists, artists and modern-day explorers.

Obtaining designation as a National Heritage Area (NHA) has the potential of creating positive economic growth and community vibrancy by attracting secondary service and retail businesses in communities within and adjacent to the NHA.

The National Park Service defines an NHA as “a place designated by Congress where natural, cultural, historic and scenic resources combine to form a cohesive, nationally distinctive landscape arising from patterns of human activity shaped by geography (reference: *National Heritage Area Feasibility Study Guidelines*, National Park Service, August 2003). These patterns make National Heritage Areas representative of the national experience through the physical features that remain and the traditions that have evolved in them. Continued use of National Heritage Areas by people whose traditions helped to shape the landscapes enhances their significance.”

National Park Service guidelines require four objectives in order to meet NHA designation:

1. Completion of a suitability/feasibility study;
2. Public involvement in the suitability/feasibility study;
3. Demonstration of widespread public support among heritage area residents for the proposed designation; and
4. Commitment to the proposal from the appropriate players which may include governments, industry, and private, non-profit organizations, in addition to the local citizenry.

NHA designation will increase public education about the Upper Missouri River Area and build a constituency interested in preserving, protecting, and enhancing the landscape. NHA designation has the potential to preserve historical components of the landscape that are of value to longtime and current residents and visitors; and to establish partnerships willing to undertake projects such as ecological restoration and interpretive signage.

The UMRHAPC is requesting proposals for consultant services to prepare the required Feasibility Study for a National Heritage Area designation with robust public participation and research utilizing Best Practices in NHA Feasibility Study development. The UMRHAPC has done considerable work and assembled several reference documents that will be made available at the time of contract award. The Corporation has allocated the sum of **fifty thousand dollars (\$50,000)** for this project.

**E. Scope of Work.** Using National Park Service (NPS), National Heritage Area Feasibility Study Guidelines, dated August 2003, the services to be provided by the Consultant shall include, but are not be limited to the following:

**1. Phase One.** Assemble applicable information to formulate an NHA proposal, inform local stakeholders of the NHA program and its potential benefits, and establish necessary collaborative relationships within the local communities by completing four of the eight specific steps outlined in the NPS National Heritage Area Feasibility Study Guidelines:

- **Step One, Defining the Study Area.** A preliminary boundary has been established by the UMRHAPC and requires further evaluation, as well as public involvement for verification and support.
- **Step Two, Public Involvement Strategy.** Since January 2015, the UMRHAPC has conducted two public meetings and made multiple presentations in stakeholder communities; however additional public involvement and engagement is needed to demonstrate widespread support for NHA designation.
- **Step Three, Determination of the region's contribution to the National Heritage and Development of Potential Themes.** Considerable historic, cultural and geographical information has been assembled into a database by the UMRHAPC; and themes/subthemes to interpret the relevance of the Upper Missouri River Area to the national experience have been developed. These themes/subthemes require additional vetting to determine completeness and relevance.
- **Step Four, Natural and cultural resources inventories, integrity determinations and affected environment data.** Again, the UMRHAPC has created an extensive database that with resource information to use in assessing the nationally distinctive qualities of the landscape.

<b>Deliverables</b>	<b>Estimated Completion Dates to be Negotiated with Successful Bidder</b>
a) A public involvement contact list defining: 1) elected officials; 2) government entities; 3) business interests; 4) NGOs; 5) community leaders; and potentially interested individuals who may be affected or have an interest in a potential heritage area.	___ calendar days after contract award
b) Assembly of all previous public involvement notifications, meetings, letters, and/or news articles.	___ calendar days after contract award
c) Public involvement and engagement strategies to engage the elected officials and the general public in the NHA process.	___ calendar days after contract award
d) Design of one public meeting agenda, a notification process, and presentation at the public meeting.	___ calendar days after contract award
e) Visual materials/handouts to use in public meetings.	___ calendar days after contract award
f) Prepared media release to reveal the NHA process and progress.	___ calendar days after contract award

- g) Public Presentation fulfilling the following 3 goals: \_\_\_\_\_ calendar days after contract award
1. Re-introduction of the NHA process,
  2. Introduction of the Contractors to the Community,
  3. Disclosure of the strategies on how the public can be engaged in the process.

2. **Phase Two.** Create the NHA Feasibility Study report and NHA proposal for submission to Congress. Format and content shall meet the intent of the NPS, National Heritage Area Feasibility Study Guidelines, August 2003, completing the remaining four of the eight steps and including an executive summary, the proposed boundary, management structure, conceptual financial plan demonstrating enthusiastic public involvement, and evaluation and assessment of NPS NHA criteria.

**Step Five, Management alternatives and preliminary assessment of impacts.**

**Step Six, Boundary Delineations.** Re-affirm the boundary proposed by the UMRHAPC or modify the proposed boundary to fully underscore the themes/subthemes; demonstrates how the region has contributed to the national story; and has public support.

**Step Seven, Heritage Area administration and financial feasibility.** Describe the management entity, how its body represents the varied interest in the potential heritage area; and a conceptual financial plan demonstrating the ability of the management entity to meet federal matching requirements for funding.

**Step Eight, Evaluation of public support and commitments.** By the nature of the board makeup, the UMRHAPC has established several partnerships within the potential heritage area. The Feasibility Study will disclose tangible commitments partners are willing to contribute towards the successful implementation of the heritage area and respond in full to the ten NHA criteria for evaluation of candidate areas by NPS, Congress and the public. Those criteria include (reference: *National Heritage Area Feasibility Study Guidelines*, National Park Service, August 2003):

- 1) An area has an assemblage of natural, historic, or cultural resources that together represent distinctive aspects of American heritage worthy of recognition, conservation, interpretation, and continuing use, and are best managed as such an assemblage through partnerships among public and private entities, and by combining diverse and sometimes noncontiguous resources and active communities;
- 2) Reflects traditions, customs, beliefs, and folklife that are a valuable part of the national story;
- 3) Provides outstanding opportunities to conserve natural, cultural, historic, and/or scenic features;
- 4) Provides outstanding recreational and educational opportunities;
- 5) The resources important to the identified theme or themes of the area retain a degree of integrity capable of supporting interpretation;
- 6) Residents, business interests, non-profit organizations, and governments within the proposed area are involved in the planning, have developed a conceptual financial plan that outlines the roles for all participants including the federal government, and have demonstrated support for designation of the area;
- 7) The proposed management entity and units of government supporting the designation are willing to commit to working in partnership to develop the heritage area;
- 8) The proposal is consistent with continued economic activity in the area;
- 9) A conceptual boundary map is supported by the public; and
- 10) The management entity proposed to plan and implement the project is described.

<b>Deliverables</b>	<b>Estimated Completion Dates to be Negotiated with Successful Bidder</b>
a) A 50% completed NHA Feasibility Study.	___ calendar days after contract award
b) Presentation to the UMRHAPC on the 50% completed report and remaining work.	___ calendar days after contract award
c) Evaluation and incorporation of comments/changes from the UMRHAPC board members and NPS into the 50% completed NHA Feasibility Study.	___ calendar days after contract award
d) Assembly of all public involvement notifications, meetings, letters, and/or news articles for Feasibility Study content.	___ calendar days after contract award
e) A DRAFT of the 100% completed NHA Feasibility Study that meets all the components outlined in the NPS, National Heritage Area Feasibility Study Guidelines, August 2003.	___ calendar days after contract award
f) Presentation to the UMRHAPC and NPS representative.	___ calendar days after contract award
g) Design of one public meeting agenda and meeting notification materials/process.	___ calendar days after contract award
h) Visual materials/handouts to use in the public meeting.	___ calendar days after contract award
i) Participation in one public meeting to present the DRAFT of the 100% of completed NHA Feasibility Study with UMRHAPC board members and present public comment process	___ calendar days after contract award
j) Review and response to editorial comments / recommendations from NPS on the DRAFT 100% completed NHA Feasibility Study	___ calendar days after contract award (plan for 60 day review period by NPS)
k) FINAL of the 100% completed NHA Feasibility Study with incorporated changes from the UMRHAPC, NPS and public comment	___ calendar days after contract award
l) Prepared media release to update the public on the FINAL Feasibility Study release; the NHA process and next steps to the public/government officials	___ calendar days after contract award

**Minimum Qualifications for Bidders.** The consultant(s) proposed for this project must meet and provide evidence of the following minimum qualifications:

1. Demonstrated experience preparing NHA Feasibility Studies using National Park Service guidelines.
2. Extensive knowledge of NPS standards and guidelines for NHA designation components.
3. Past experience researching and applying NHA designation criteria in the evaluation of potential heritage areas.
4. Established relationships with NPS, National Heritage Area staff.
5. Demonstrated experience from past project completion to meet professional qualifications developed by the National Park Services under 36 CFR Part 61, Secretary of Interior's Standards and Guidelines [As Amended and Annotated] – Professional Qualification Standards.  
See link: [https://www.nps.gov/history/local-law/arch\\_stnds\\_9.htm](https://www.nps.gov/history/local-law/arch_stnds_9.htm).
6. Demonstrated experience working with a Native American community.
7. Demonstrated experience developing and implementing a public involvement process.
8. Demonstrated experience inventorying and conducting historical research using a GIS system.
9. Demonstrated experience writing/preparing large written reports (25+ pages).
10. Proven ability to design an outreach strategy to engage an array of stakeholders in a meaningful way.
11. Availability of staff to conduct work in a cost-effective manner.
12. Demonstrated past experience meeting project deadlines by providing references for three projects.

**F. Proposal Requirements.** RFP submissions must be complete and accurate to be considered. Submissions lacking the response requirements listed below will be deemed unresponsive and eliminated from consideration. Responses to this RFP must include the following:

1. **Letter of Interest.** The letter shall include the principal firm's legal name, address, telephone number, email contact and be signed by the individual authorized to bind the bidder contractually.
2. **Table of Contents.** Immediately following the letter of interest, there shall be a comprehensive Table of Contents specifying the materials addressed in the proposal. The Table of Contents must clearly identify the proposal section/subsection and applicable page numbers.
3. **Statement of Qualifications.** The following shall be provided:
  - a. the principal(s) who will be part of the project team and their experience/educational knowledge qualifying them to perform the work;
  - b. list and provide resumes for all key personnel who will be part of the project team providing the required services. Provide their title and anticipated role in the project work, and their experience/educational knowledge qualifying them to perform the work;
  - c. a description of the consultant(s) experience performing contracted work of a similar nature;
  - d. a description of how the project work will be coordinated with the consultant(s)' current work activities;
  - e. link to electronic examples of the consultant(s)' report writing, specifically writing that applies to NHA designation and/or historic preservation;
  - f. an acknowledgement that the consultant(s) will be able to produce products compatible with MS Word, MS EXCEL, MS ACCESS, PastPerfect, Adobe Acrobat, and ESRI ArcMap.

4. **Technical Approach/Work Plan.** Bidders shall demonstrate an understanding of and an approach to the work to be performed. Additionally, bidders shall prepare a Work Plan and schedule for tasks completion using the deliverables list outlined in **Section E. Scope of Work**. The deliverables list may be modified during contract negotiations with the successful bidder, include any suggested changes in the Work Plan. The Work Plan shall identify each major task and/or specific milestones by which progress can be measured and proposed payments made (maximum 4 pages). The Work Plan and schedule will be crucial in demonstrating the bidder's understanding of the project, the approach to accomplish the project objectives, and the bidder's ability to perform the required services. **Sections D** and **Section E** provide the objectives and general tasks to be completed.
5. **References.** List three (3) representative projects of a similar nature performed within the last five years. Identify the approximate dates when each project was undertaken, the name and contact information (phone and email) of the contract manager for whom the work was performed.
6. **Required Attachments.** Bidders shall include all documents identified in the Required Attachments and Enclosures outlined in Attachment 1, Checklist. Any proposal which does not meet the basic proposal requirements shall be deemed non-responsive and eliminated from consideration.
7. **Cost Proposal.** It is the intent of the UMRHAPC to award a lump sum contract. It is estimated that this project will take no more than 12 -14 months (includes 30-60 days for NPS review) to complete. Proposals shall be presented on **Attachment 4, Cost Proposal Worksheet** and specify an incremental payment schedule linked to the deliverables, as defined in **Section E. Scope of Work**. Include any suggested modifications to the deliverables schedule as proposed in the Work Plan. Bids shall include all labor, travel, materials, equipment and incidental expense associated with the scope of work. Bidders shall submit a cost proposal to include projected milestones for partial payments. The cost proposal shall be sealed in a separate envelope and marked "**Sealed Cost Proposal – Do Not Open**" with the name of the bidder on the outside of the envelope.

#### G. General Information.

1. **Time Schedule.** It is recognized that time is of the essence. Bidders are advised of the following schedule and will be expected to adhere to the required dates.

Event	Date
RFP available to prospective bidders	8-15-2017
Written Questions Submittal Deadline	9-05-2017
Final Date for Proposal Submission, postmarked NLT 09/15/2017. Hand-deliveries are not accepted. Mailing Address: UMRHAPC PO Box 1323 Great Falls, MT 59403	9-15-2017
Prequalification for Completeness	9-20-2017
Proposal Evaluation and Ranking (estimated date)	9-29-2017

Finalist Interviews	10-13-2017
Notice of Intent to Award (estimated date)	10-19-2017
Contract development, processing and execution (estimated date)	11-03-2017
Contract Start Date ( <i>Notice to Proceed</i> ) within 30 days of award	12-01-2017
Submission of Final Report (estimated date) within 12-14 months	12-01-2018

2. **Contact for Questions.** All questions concerning this RFP shall be submitted in writing by email to [jweber@casadecountymt.gov](mailto:jweber@casadecountymt.gov) on or before September 5, 2017.
3. **Selection Criteria.**
  - a. Professional experience of the individual or team in relation to the work to be performed.
  - b. Professional experience and academic background of the principal staff assigned to the project.
  - c. Demonstrated competence and experience of the individual or team relevant to this project.
  - d. Reliability of the individual or firm and longevity of the proposed staff or team's staff.
  - e. Individual or team's workload and demonstrated ability to meet schedules.
4. **Proposal Evaluation Process.** Proposals must be organized to correspond with all requirements and formats set forth in this RFP. Proposals should be clear, concise and complete; and they must contain all information for consideration. No assumptions will be made by the UMRHAPC regarding the intentions of the bidder. Proposals must be bound and organized in a manner to facilitate ease of review by evaluators. Proposals not containing all requested information will be deemed unresponsive and eliminated from consideration.

Proposals will be evaluated for form and content. Clarifications may be requested from the bidder at any phase in the evaluation process. Proposals and any work sample shall be submitted with the most favorable terms the bidder can offer. If the UMRHAPC is unable to execute an Agreement with the apparent successful bidder, the UMRHAPC reserves the right to award the Agreement to the next highest scoring responsive/responsible bidder whose proposal meets the requirements of this solicitation.

The purpose of the proposal evaluation process is: 1) to assess the response in meeting the minimum qualification requirements; 2) to identify the Consultant with the highest probability of satisfactorily performing the services, and 3) to determine the most cost efficient Consultant. The evaluation process will be conducted in a comprehensive and impartial manner as set forth herein:

- a. **Prequalification Evaluation for Completeness.** This test is to ensure all requirements are followed.
  - 1) Each proposal package will be date and time stamped when received.
  - 2) Each proposal package will be reviewed to ensure it is properly sealed and labeled. Proposals not passing this inspection will not be accepted.
  - 3) All proposals will remain sealed and in a secured location until opening, at which time all proposals will be opened together.

- 4) All proposals will be reviewed to determine if they satisfy the minimum qualifications and contain the required submittal materials specified in this RFP.
- b. **Proposal Evaluation.** Proposals passing the prequalification evaluation for completeness will undergo an evaluation process conducted by a team of reviewers appointed by the UMRHAPC or designee. Each team member will independently score the proposals based on the categories enumerated in the Scoring System section below.
5. **Scoring System.** The highest point score awarded for this proposal is 200 points based on the information provided by the Consultant(s).
- a. **Technical Quality of the Proposal** 30 POINTS
- 1) Proposal demonstrates the Consultant(s) has a good understanding of the scope of the project and the issues. (20 points)
  - 2) The Work Plan contains a clear description of how the work will be managed and coordinated with the UMRHAPC. (10 points)
- b. **Consultant Qualifications and Experience** 100 POINTS
- 1) Consultant and key team players assigned to the project have demonstrated experience preparing NHA Feasibility Studies and/or providing consulting services to entities seeking NHA designation. (25 points)
  - 2) Consultant(s) has demonstrated having a relationship with the National Park Service, specifically the NHA staff members. (10 points)
  - 3) Consultant(s) have knowledge relating to the history, culture, geography of the Upper Missouri River area. (10 points)
  - 4) References indicate Consultant(s) has consistent successful performance on similar projects, especially in the areas of timeliness, cost control and completeness. (20 points)
  - 5) Consultant(s) clearly demonstrates their ability to develop and manage an outreach process to ensure meaningful engagement in a planning process with a wide array of stakeholders (elected officials, landowners, tribes, businesses, NGOs, etc.). (15 points)
- c. **Availability and Capacity to Perform the Services** 20 POINTS
- 1) Consultant(s) have demonstrated that given their current/projected workload, they will be able to complete the work on time. (10 points)
  - 2) Consultant(s) Work Plan indicates they will spend sufficient time in the Upper Missouri River area communities to ensure meaningful public engagement with stakeholders and UMRHAPC members. (10 points)
- d. **Cost** 50 POINTS
- Sealed cost proposals will be opened after the Consultant(s) are scored in the above categories. The lowest bid on a qualified proposal will receive the highest points. Each remaining bidder will receive points determine by multiplying 50 (points) by the result of dividing the low bid by its bid. All scores will be rounded to the nearest integer.
- Example:*  
*The lowest bid is \$30,000 and another bid is \$35,000. The lower bidder would receive 50 points. The other proposal would receive  $30/35 \times 50 = 43$  points.*

## 6. Submission of Proposal

- a. A minimum of the original and seven (7) copies of the proposal must be submitted.
- b. The original proposal must be marked "ORIGINAL COPY." All documents contained in the original proposal package must have original signatures and signed by a person authorized to bind the proposing Consultant(s).
- c. The Cost Proposal and all cost information must be submitted in a separate sealed envelope. The envelope should be affixed to the outside of the proposal package, sealed and marked "Cost Proposal – DO NOT OPEN."
- d. Proposals must include the documents identified in the Required Attachment Checklist. Proposals missing the proper, required attachments and/or enclosures shall be deemed non-responsive. A non-responsive proposal will be rejected.
- e. Proposals must be submitted in a sealed envelope, mailed to the Upper Missouri River Heritage Area Planning Corporation, Inc., PO Box 1323, Great Falls, MT 59403 and postmarked on or before the due date for this RFP, otherwise submissions will be rejected.
- f. Proposal envelopes must be plainly marked with the Bid Title, the Firm's Name and Address, and must be marked with "DO NOT OPEN," as shown in the example below:

Feasibility Study for the Upper Missouri River NHA Designation  
(Your Firm Name)  
(Your Firm Address)  
DO NOT OPEN

- g. Mail or deliver proposal to the following address:  
Upper Missouri River Heritage Area Planning Corporation, Inc.  
PO Box 1323  
Great Falls, MT 59403  
Attn: RFP Task Force
- h. Bidders are solely responsible for insuring proposal is postmarked no later than the date specified in this RFP. Consultant(s) may verify timely receipt of their proposal by contacting UMRHAPC Secretary, Lynette Scriver-Colburn at [scriver1805@yahoo.com](mailto:scriver1805@yahoo.com); 406-788-3785.
- i. If the proposal is made under a fictitious name or business title, the actual legal name of the bidder must be provided.
- j. Proposals must be submitted for the performance of all the services described herein. Any deviation from work specifications will not be considered and will cause a proposal to be rejected.
- k. Costs for developing proposals and in anticipation of award are entirely the responsibility of the bidder and shall not be charged to the UMRHAPC.
- l. A bidder may modify a proposal after its submission by withdrawing its original proposal and resubmitting a new proposal if it occurs prior to the submission deadline. Proposal modifications offered in any other manner, oral or written, will not be considered.

- m. A bidder may withdraw its proposal by submitting written withdrawal request to the UMRHAPC, signed by the bidder or authorizing agent. A bidder may thereafter submit a new proposal if it occurs prior to the submission deadline.
  - n. The UMRHAPC is not responsible for notifying bidders of defects or errors in their submitted documents. Bidders are advised to carefully proof their proposal for errors and adherence to the RFP requirements prior to submission.
  - o. No more than one proposal from an individual, firm, partnership, corporation or association under the same or different names will be considered. If there is reason to believe that collusion exists among the bidders, none of the participants in such collusion will be considered.
  - p. The UMRHAPC reserves the right to reject proposals for reasonable cause. If all proposal bid costs are too high, the UMRHAPC is not required to award a contract.
  - q. The UMRHAPC made modify this RFP prior to the date of proposal submissions by the issuance of an addendum to all parties who received the proposal package.
7. **Notice to Proceed/Contract Amendments.** The UMRHAPC shall notify the selected Consultant and negotiate a contract with the intended start date provided in this RFP. Other items to be negotiated are the milestone payments and amounts as provided in the bidder's submission.
8. **Disposition of Proposals.** All submitted documents associated with this RFP become the property of the UMRHAPC at the time the proposal packages are opened.

## Attachment 1 Required Submission Checklist

A complete bid or bid package must include the items listed below. Complete this checklist to confirm the items in your bid. Place an check mark “√” or “X” next to each item to ensure completeness. For your bid to be responsive, all required attachments and enclosures must be returned. This checklist should be returned with your bid package.

<u>Attachments</u>	<u>Attachment Name/Description</u>
_____ Attachment 1	Required Submission Checklist
_____ Attachment 2	Work Plan (no more than four pages)
_____ Attachment 3	Bid/Bidder Certification Sheet
_____ Attachment 4	Cost Proposal Worksheet in a SEALED ENVELOPE marked “ <b>COST PROPOSAL - DO NOT OPEN</b> ”
_____ Attachment 5	Bidder References
_____ Attachment 6	Non-Disclosure Statement

## Attachment 2 Bidder Technical Approach/Work Plan

**Technical Approach/Work Plan.** Demonstrate your understanding of the work to be performed by indicating your approach to this project and your schedule for completing the tasks using the deliverables list outlined in **Section E. Scope of Work**. The deliverables list may be modified through contract negotiations, include any suggested changes in this Work Plan. The Work Plan shall identify each major task and/or specific milestones by which progress can be measured and proposed payments made **(maximum 4 pages)**.

### Attachment 3 Bid/Bidder Certification Sheet

This Bid Certification sheet must be signed and returned with all of the required attachments as an entire package. The signature affixed hereon and dated certifies compliance with the requirements of this proposal document and authorizes the verification of this certification.

**NOTE: An unsigned Bid/Bidder Certification sheet will be cause for rejection.**

1. Company Name	2. Telephone  (   )	3. Email Contact
4. Physical Mailing Address		
Indicate your organization type:		
<input type="checkbox"/> 5. Sole Proprietorship	<input type="checkbox"/> 6. Partnership	<input type="checkbox"/> 7. Corporation
8. Federal Employee Tax ID Number (only if appropriate). <b>Do NOT include any SSN.</b>		
9. Indicate applicable license and/or certification information:		
10. Bidder's Name (Print)	11. Title	
12. Bidder's Signature	13. Date	

#### Bid/Bidder Certification Sheet Instructions

Item No.	Instructions
1,2,3,4,	Must be completed. These items are self-explanatory
5	Check if your firm is a sole proprietorship. A sole proprietorship is a form of business in which one person owns all the assets of the business in contrast to a partnership or corporation. The sole proprietor is solely liable for all business debts.
6	Check if your firm is a partnership. A partnership is a voluntary agreement between two or more competent persons to place their money, effects, labor, and skill or some or all of them in lawful commerce or business, with the understanding that there shall be a proportional sharing of the profits and losses between them. An association of two or more persons to carry on, as co-owners, as business for profit.
7	Check if you firm is a corporation. A corporation is an artificial person or legal entity created by or under the authority of the laws of a state or nation, composed, in some rare instance, of a single person and his successors, being the incumbents of a particular office, but ordinarily consisting of an association of numerous individuals.
8	Enter your federal employee tax identification number.
9	Complete, if applicable, by indicating the type of license and/or certification your firm possesses and that is required for the type of services being procured.
10,11,12,13	Must be completed. These items are self-explanatory.

## Attachment 4 Cost Proposal Worksheet

Professional Services for Lump Sum Bid \$ \_\_\_\_\_ Total Cost

Please indicate milestone tasks to complete (ie. deliverables) and corresponding partial payments linked to the deliverables outlined in **Section E. Scope of Work** and any additional/modified deliverables described in your **Work Plan, Attachment 3**.

Bids shall include all labor, travel, materials, equipment and incidental expense associated with the scope of work.

**REMINDER: Attachment 4. Cost Proposal Worksheet**, shall be sealed in a separate envelope and marked "Sealed Cost Proposal – Do Not Open" with the name of the bidder on the outside of the envelope.

**PHASE 1** (please refer to deliverables list in **Section E. Scope of Work**. Add more rows to this table, as appropriate to match the deliverables listed in your Work Plan)

Deliverables Description	Cost for Services
<b>a.</b>	\$ _____
<b>b.</b>	\$ _____
<b>c.</b>	\$ _____
<b>d.</b>	\$ _____
<b>e.</b>	\$ _____
<b>f.</b>	\$ _____
<b>g.</b>	\$ _____

**PHASE 2** (please refer to deliverables list in **Section E. Scope of Work**. Add more rows to this table, as appropriate to match the deliverables listed in your Work Plan). Please bid the Categorical Exclusion as a separate line item, as this deliverable may not be needed.

Deliverables Description	Cost for Services
a.	\$ _____
b.	\$ _____
c.	\$ _____
d.	\$ _____
e.	\$ _____
f.	\$ _____
g.	\$ _____
h.	\$ _____
i.	\$ _____
j.	\$ _____
k.	\$ _____
l.	\$ _____

The bid amount shall include all costs, including all labor, equipment, transportation, supplies, materials necessary to complete the proposed work to be performed in this RFP.

## Attachment 5 Bidder References

List below three references for services performed within the last five years which are similar in scope of work to be performed in this RFP. If references cannot be provided, please explain why on an attached sheet of paper.

REFERENCE 1			
Name of Firm	Email Contact:		
Street Address	City	State	Zipcode
Contact Person	Telephone Number		
Dates of Service	Value or Cost of Service		
Brief Description of Service Provided:			

REFERENCE 2			
Name of Firm	Email Contact:		
Street Address	City	State	Zipcode
Contact Person	Telephone Number		
Dates of Service	Value or Cost of Service		
Brief Description of Service Provided:			



**Attachment 6**  
**Non-Disclosure/Confidentiality Agreement**

Due to the nature of the information involved in this RFP, bidders are required to sign a non-disclosure form.

**CONFIDENTIALITY AGREEMENT**

THIS AGREEMENT dated \_\_\_\_\_, 2017, by and between Upper Missouri River Heritage Area Planning Corporation, Inc., a Montana Corporation ("UMRHAPC") and \_\_\_\_\_ ("Recipient").

*RECITALS:*

- 1) UMRHAPC has in its possession certain materials, commonly referred to or identified as "**Cultural Resource Locational Data.**" These materials are subject to a certain measure of protection from public dissemination, in part because of federal law, and are therefore considered "Confidential Information".
- 2) UMRHAPC and Recipient, for their mutual benefit, and pursuant to a working relationship which has been or may be established, anticipate that UMRHAPC may disclose the aforementioned Confidential Information to Recipient.
- 3) UMRHAPC desires to assure that the confidentiality of this Confidential Information is maintained;

*NOW, THEREFORE*, in consideration of the foregoing premises, and the mutual covenants contained herein, UMRHAPC and Recipient hereby agree as follows:

1. Recipient shall hold in trust and confidence, and not disclose to others or use for Recipient's own benefit or for the benefit of another, any Confidential Information which is disclosed to Recipient by UMRHAPC. Recipient shall disclose Confidential Information received under this Agreement to persons within its organization only if such persons (i) have a need to know and (ii) are bound in writing to protect the confidentiality of such Confidential Information. This paragraph 1 shall survive and continue after any expiration or termination of this Agreement and shall bind Recipient, its employees, agents, representatives, successors, heirs and assigns.
2. The undertakings and obligations of Recipient under this Agreement shall not apply to any Confidential Information which is disclosed in a printed publication available to the public, or is otherwise in the public domain through no action or fault of Recipient, is generally disclosed to third parties by UMRHAPC without restriction on such third parties, or is approved for release by written authorization of UMRHAPC.
3. Recipient shall, upon request of UMRHAPC, return to UMRHAPC all Confidential Information and all manifestation thereof, delivered to Recipient, and all copies and reproductions thereof.
4. This Agreement shall be binding upon and will inure to the benefit of the parties hereto and their respective successors and assigns.
5. This Agreement is governed by and will be construed in accordance with the laws of the State of Montana, and the courts of Montana shall be the exclusive forum.
6. This Agreement may not be modified, in whole or in part, except by an agreement in writing signed by UMRHAPC and Recipient.

*IN WITNESS WHEREOF*, the parties have executed this Agreement as of the date first above written.

**UMRHAPC, Inc.**

**RECIPIENT**

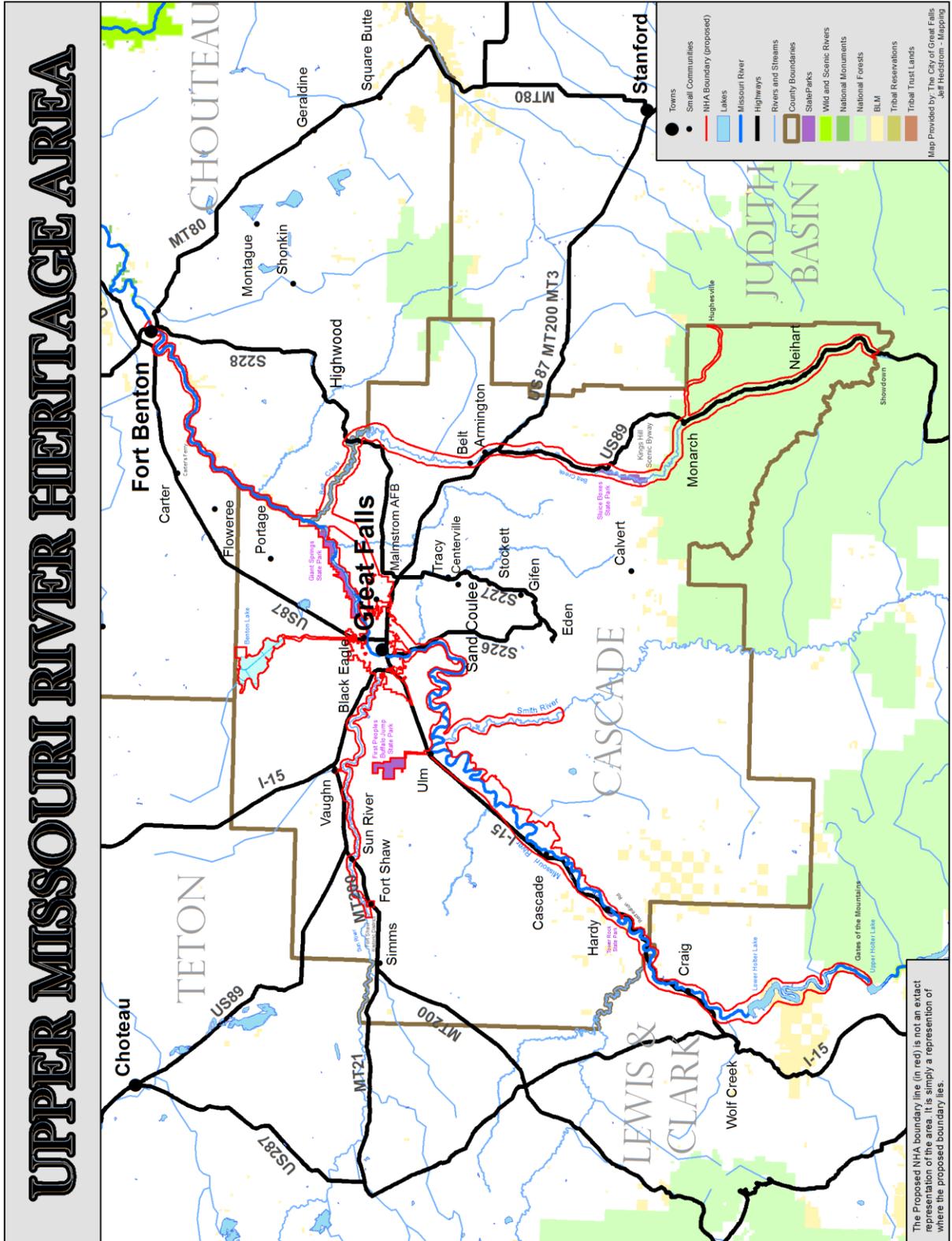
By: \_\_\_\_\_

By: \_\_\_\_\_

Its: \_\_\_\_\_

Its: \_\_\_\_\_

## Addendum 1 Map of the Proposed NHA Boundary



Addendum 2  
Upper Missouri River Heritage Area Planning Corporation

**Theme 1: Ice Age/American Indians**

**The geological and ecological history of this land shaped early people's adaptation to and use of the Upper Missouri Region.**

Subthemes:

1. Pre-Ice Age geological period depositions and orogeny shaped the landscape and created stone resources used by Native Americans to make ground and flaked stone implements.
2. The Pleistocene Ice Age left glacial remnants from the Laurentide Ice Sheet as far southwest as Rainbow Falls on the Missouri River.
3. The Laurentide ice sheet wrapped itself around the Bears Paw and Little Rocky Mountains, leaving an ice-free landscape in the White Cliffs area.
4. The Late Glacial Laurentide Ice Sheet dammed the Missouri River at Rainbow Falls, creating Glacial Lake Great Falls that extended upstream to modern Upper Holter Lake.
5. Glacial Lake Great Falls burst out through three outlets, creating Lost Lake and the Shonkin Sag and rerouting the Missouri River.
6. Native Americans have lived in in the Upper Missouri region from at least 14,200 years ago to the present, perhaps when Glacial Lake Great Falls was present.
7. Algonquian, Kootenai, and Salishan people have used the Upper Missouri landscape continuously from the earliest occupation of the Northern Rockies and Northern Plains.
8. Early Native Americans used glacial gravels for stone tools, as well as hornfels from Chouteau County's Square Butte and other sedimentary and igneous rock in the region.
9. Archaeological sites in the Highwoods demonstrate continuous occupation for the past 9,000 years.
10. The Sun River archaeological site just north of Great Falls was left by people who lived there from 5,000 to 3,000 years ago.
11. Archaeological sites in Great Falls and near Carter have evidence of people living in this area during the Late Archaic period, approximately 2500 years ago.
12. Lost Terrace in the Upper Missouri Breaks National Monument is an Avonlea antelope butchering site dated at approximately 1800 years ago.
13. First People's Buffalo Jump has been used by Native people for the past 1500 years, and people have been on that landscape for at least 5000 years.
14. It is unknown how long the Nez Perce have hunted in the Upper Missouri region, but they are one of the thirteen tribes associated with First People's Buffalo Jump.

15. The Nez Perce Trail crosses the Upper Missouri region up the Cow Creek drainage; Fort Benton is designated as a Contributing Site.
16. Siouan-speaking people have used the Upper Missouri region from about A. D. 1400 into the historic period.
17. The Lame Bull or Blackfoot Treaty of 1855 was signed at a treaty council site on the Upper Missouri River, across from the mouth of the Judith River.
18. From at least the early eighteenth century until the present time, Chippewa (Anishinabe) Indians have lived in the Upper Missouri area and in modern times are represented by the Chippewa Cree Tribe of the Rocky Boy's Reservation, Little Shell Tribe of Chippewa Indians, and mixed blood Métis people.

### **Theme 2: Exploration and Settlement**

#### **The Upper Missouri River was crucial for the exploration, settlement, and development of northcentral Montana.**

##### Subthemes:

1. Over the last 15,000 years, the stories of hunters and gatherers, fur trappers, homesteaders, settlers, miners, and many others have been intricately tied to the Upper Missouri River and its landscapes.
2. Lewis and Clark recorded no permanent settlement in this area of Montana, just evidence of its use by many nomadic peoples. This area of Montana was often referred to as a “common hunting ground.”
3. The Corps of Discovery portaged the Great Falls of the Missouri in about two arduous and back-breaking weeks. The 18-mile Portage Route is now a National Historic Landmark due to its national significance.
4. The mission of the Lewis and Clark Expedition to follow the Missouri River to its source left a rich legacy of recording flora, fauna, and geology of our area, much of it new to science.
5. Settlement could not happen until immigrants learned to live with the nomadic natives of the area.
6. From trading posts to city, the Missouri River played a crucial role in the settlement of “the birthplace of Montana”—Fort Benton, now a National Historic Landmark.
7. The founder of Great Falls, Paris Gibson, understood the importance of the Missouri River concerning settlement, farming/ranching, and mechanical power development.
8. Railroad development brought an end to river navigation. Agriculture flourished because the railroads provided fast and reliable shipment to markets.

### **Theme 3: Transportation**

#### **Transportation opportunities on and along the Upper Missouri River and its tributaries initiated the use of resources of the region, the exploration, and settlement of Montana and the Northwest.**

##### Subthemes:

1. For thousands of years, Native Americans, including the Blackfeet, Assiniboine, and Gros Ventre, developed and utilized trails along the Upper Missouri and its tributaries to follow game, winter in protected sites, and trade with other tribes.
2. The river provided the means to navigate, explore, and seek a north-west passage by Lewis and Clark and the Corps of Discovery expedition.
3. The Mullan Military Wagon Road completed the Northwest Passage through the Rocky Mountains, the Northwest's first interstate highway.
4. Steamboats transported passengers and tons of cargo from St. Louis through the Upper Missouri to Fort Benton.
5. Settlers, miners, and soldiers embarked on roads and trails from Fort Benton, head of navigation on the Upper Missouri and the birthplace of Montana. Roads and trails radiated from Fort Benton, like spokes on a wagon wheel, in every direction. The Mullan Road evolved into the Benton to Helena Road, while the Whoop-Up Trail led to the settlement of western Canada.
6. The arrival of Jim Hill's Great Northern Railroad completed the vision of a transcontinental railroad through the Upper Missouri River region.
7. During Prohibition in the United States, whiskey "flowed" south from Canada along the Bootlegger Trail to Great Falls and other distribution points.
8. Modern transportation routes including the interstate highway follow, connect, and cross the Upper Missouri River providing viable transportation routes for residents, goods and services, and visitors to the region.

### **Theme 4: Military**

#### **From Native Warriors and Buffalo Soldiers to Space Age National Defense. The Upper Missouri River Heritage Area (UMRHA) has experienced conflict and played a major role in our nation's defense.**

##### Subthemes:

1. Native American tribes in the region, Blackfoot, Gros Ventre, Cree, Chippewa, Metis, Crow, and others, conducted self-defense and Intertribal Warfare.
2. The Lewis and Clark Military Expedition Corps of Discovery navigated along the Upper Missouri and tributary rivers following today's Lewis & Clark National Historic Trail and Upper Missouri Breaks National Monument.
3. Other Army exploration expeditions traveled through the Heritage Area including the Pacific Railway Survey (1853-54) and Reynolds Exploration Expedition (1859-60).

4. The Mullan Military Wagon Road Expedition build a road through the region, connecting Fort Benton with Fort Walla Walla; the first military use of the new road was Major George Blake's First Dragoons from Fort Benton to Fort Walla Walla.
5. The 1<sup>st</sup> US Volunteer Infantry (Galvanized Yankees) arrived at Fort Benton in the spring of 1865, becoming the first U.S. Army unit stationed in Montana Territory.
6. Military posts were constructed in the region at Camp Cooke (1866), Fort Shaw (1867), Fort Benton (1869), and nearby Fort Assinniboine (1879).
7. Incidents and wars occurred in the region with the Blackfoot (1865-1870), the Marias Massacre (1870), Sioux (1876), and Nez Perce ending in the nearby Battle of the Bear's Paw (1877). Fort Benton is a contributing site on The Nez Perce National Historic Trail, and the trail crossed the Upper Missouri at Cow Island.
8. African American Buffalo Soldiers were stationed at Fort Shaw and Fort Assinniboine during the 1880s-90s.
9. During World War II, Gore Hill Air Base and Great Falls Air Base played vital military roles. Great Falls Air Base conducted B-17 training for the Second Bomber Group, while at Gore Hill the Seventh Ferrying Command sent over 8,000 aircraft to the Soviet Union under the Lend Lease program.
10. Early in the Cold War Great Falls Air Force Base conducted Operation Vittles, proving C-54 transport training for the Berlin Airlift.
11. From 1947, the Montana Air National Guard, based at Gore Hill, operated Fighter Squadrons; today, the Air Guard operates a C-130 Squadron in support of national defense.
12. Malmstrom Air Force Base operates a Minuteman Missile Wing in support of National Defense. This intercontinental ballistic missile capability became operational just before the 1962 Cuban Missile Crisis becoming President John F. Kennedy's "Ace in the Hole" during the crisis.
13. Highland Cemetery's Soldiers Monument was the first in the United States to honor both Union and Confederate Soldiers while the Montana Veteran Memorial honors and recognizes all veterans of all branches of military service, in peace and in war.

### **Theme 5: Industrial**

**From the first people through the ages, the Upper Missouri River and its tributaries have supported and powered industry.**

#### **Subthemes:**

1. The ford in the Upper Missouri at Great Falls created a crossing for bison and the banks became a meat processing site for many tribes. Native Americans have used bedrock, such as hornfels, and glacial gravels found in this region to make flaked and ground stone tools.
2. The Lewis and Clark Corps of Discovery created the written record of the Upper Missouri Region. Their words became the first "walking brochure" or "economic marketing piece" for what was to become the Montana Territory.

3. From reading the LC journals, 75 years later Paris Gibson was encouraged to visit the site whereby he immediately recognized the potential for industrial development. Great Falls was built on a grid, using the natural curve of the Missouri River to define its transportation routes used for later industrial transport.
4. Gibson had the foresight to visualize Great Falls as an industrial mega-power; he established the Great Falls Townsite and Electric Company that built the first dam on the Missouri River (Black Eagle).
5. Railroad transportation routing made industrial development possible – regional coal and hard rock mineral mining thrived as transportation routes expanded. Shonkinite, a volcanic potassic feldspar found in the Highwood, Little Belt, Adel and Bears Paw Mountains, has been used for building and dam construction since the early twentieth century.
6. An early 19<sup>th</sup> century newspaper headline said: Great Falls, the city of wind, water and future (Future Great was another commonly used moniker for Great Falls).
7. Timing was serendipitous. In 1882, while Paris Gibson planned for water power, Marcus Daley discovered copper in Butte and Thomas Edison flipped the switch on the first public electric lighting in NYC creating the flurry for widespread electrical power. The stars aligned to make it possible for Great Falls to ultimately “wire the world.”
8. Great Falls developed the electrical power to initially smelt Butte’s copper and regional minerals; and then later became the “powerhouse” to refine and produce wire, cable, ball bearings and more. This industry helped Great Falls grow exponentially.
9. By 1920, the Anaconda Company at Black Eagle was also the largest zinc plant in the world and produced half of the world’s zinc.
10. John Ryan rose to become chairman of the Anaconda Company; and he created the Montana Power Company in the early 1910s. A unique system of five dams built on the Missouri River, dropping water 500 vertical feet within 20 miles, has been a continuous and renewable source of electricity.
11. Rainbow Powerhouse provided the energy to build Fort Peck Dam.
12. The first flour mill in the Great Falls area was the Cataract Mill built in 1884. The Golden Triangle continues to produce quality grains that have spurred the development of numerous mills and agricultural manufacturing facilities (pasta, malting, biofuels, and heritage grains). The region remains a national leader in agricultural production from hard red winter wheat to malt barley.
13. Access to petroleum and transportation routes along the Missouri River spurred the development of oil refineries in the region.
14. The Sun River irrigation system, which watered vast agricultural production on the plains, was one of the most unique engineering feats in the country, at the time.
15. As the region transitioned from bison to beef, cattle herds in the tens of thousands roamed the open range, followed by herds of sheep in the thousands.

16. Tourism is a modern growth industry in the Upper Missouri River region, as recreation seekers discover the majesty of the rolling, unfenced plains, clear streams, and island mountain ranges.

### **Theme 6: Art**

#### **The landscapes and cultures of the Upper Missouri River region continue to inspire artists and storytellers.**

##### Subthemes:

1. The first people in the Upper Missouri River region left traces in the land and oral histories that document their culture.
2. The Lewis & Clark Corps of Discovery documented the landscape and left the first written description of the Upper Missouri River region as part of their journey through what was the most significant land acquisition in the history of the nation.
3. The Lewis & Clark Journals enticed visitors, artists and developers to the Upper Missouri River region.
4. Artist Karl Bodmer came to the Upper Missouri 1832-34 with his sponsor Prince Maximilian zu Wied-Neuwied. Bodmer interpreted and painted the Upper Missouri River landscapes and Native Americans, leaving the earliest and most remarkable visual history of the region.
5. Artists John Mix Stanley and Gustavus Sohon accompanied Washington Territory Governor, Isaac I. Stevens, on the Pacific Railway Survey through the area (1853-55) and painted dozens of watercolor scenes of the spectacular geographic features and Native American lifestyles. Sohon painted the great falls of the Missouri. His painting was made into a lithograph for use in the published Pacific Railway Survey report and is the first known image of the great falls.
6. Charles M. Russell captured the “West that Was” in “word pictures” and a vast collection of more than 4000 art works.
7. The C.M. Russell residence and studio were recognized in 1965 as a National Historic Landmark, important to the history of the United States for the contribution made by the art of Russell.
8. Over thousands of years the stories of peoples’ lives have been intricately tied to the Upper Missouri River and its landscapes. The stories are told in a broad range of cultural resources including pictographs, photographs, tools, music, art, crafts, journals and books.