



REQUEST FOR QUALIFICATIONS (RFQ) FOR PROJECT MANAGEMENT/CONSTRUCTION MANAGEMENT SERVICES FOR THE ALAMO PLAN RESTORATION AND EXPANSION

About the Alamo

The Alamo belongs to the people of Texas. In 2011, the Texas Legislature designated the Texas General Land Office (GLO) the custodian of the Alamo on behalf of the people of Texas. The GLO contracts with Alamo Trust, Inc. (ATI) to manage the day-to-day operations and staff at the Alamo. ATI is a non-profit charitable organization under Internal Revenue Code Section 501(c)(3). The mission of ATI is to preserve the Alamo, the Shrine of Texas Liberty, and bring its own unique story to life – to inspire visitors and honor all those who lived, fought, and died here.

The Alamo tells the story of Texas independence as part of its 300-year history to over 1.6 million visitors every year and is the #1 most visited attraction in the state. The story of the Alamo is world renowned and represents the core of Texas' identity today.

The Alamo Plan is our ongoing effort to restore dignity and reverence to the Alamo and it is fully underway. More information on the Alamo Plan is available at <https://www.thealamo.org/support/alamo-plan>.

Project Overview and Goal

ATI is seeking proposals for a provider who can provide professional consulting services for the project/construction management of the Alamo Plan Restoration and Expansion.

The goal of the Alamo Plan is to preserve the 300-year-old Church and Long Barrack, recapture the original mission site and battlefield footprint, and create a world-class Visitor Center & Museum to tell the history of the site.

This includes the Alamo Collections Center opening in early 2023, the Education Center and South Gate opening fall 2023, Exterior Plaza and Paseo Construction, Church and Long Barrack Preservation & Interpretation Update in 2024 and 2025, and the Visitor Center & Museum grand opening in March 2026.

Project Description

This Alamo Plan includes a series of overlapping projects throughout the site, many running concurrently with final site completion in 2026. These projects will include the Visitor Center and Museum, Church, Long Barrack, Alamo Plaza, South Gate and Lunette, Plaza de Valero + Promenade, Upper Paseo, Lower Paseo, Alamo Gardens, North Streetscape, Event Center, Education Center, and the Cenotaph Restoration.

- **Visitor Center and Museum** - The Visitor Center and Museum will repurpose the historic Crockett and Woolworth buildings and feature 32,000 square footage of

exhibit space. In addition, there will be a rooftop event space, a café and retail space.

- **Church** - The Alamo Church will undergo preservation and conservation as one of the sole remaining structures from on the site. New, modern interpretation will be added following preservation and restoration of the structures, including a focus on the Church Sacristy and frescos that have been discovered there. The goal is to create a quiet moment for reflection while preserving the historic character of the church.
- **Long Barrack** - The Long Barracks will undergo preservation and conservation as one of the oldest buildings on the site. This structure will provide a multitude of interpretive opportunities, from exploring the lives of the Catholic missionaries and Spanish soldiers who occupied the quarters to highlighting key moments of the battle of 1836. The team can utilize the finished interior space and updated artifact displays along with graphic interpretation to reflect the design approach developed for the Visitor Center and Museum.
- **Alamo Plaza, South Gate and Lunette** - As part of reclaiming the historic 1836 footprint of the battlefield, the Alamo Plan includes rebuilding the South Gate and Lunette and including modern exhibitry.
- **Plaza de Valero + Promenade and North Streetscape**- Visitors will feel that they are moving through time, following the footsteps of the many peoples who have occupied the site over the centuries. After the redesign, this space should build anticipation for visitors as they approach the South Gate, provide historical context prior to arrival at the Fort's perimeter, create a new level of reverence for the site, and pose questions that will help immerse visitors in the story.
- **Upper Paseo** - A new landscape garden feature will be integrated behind the new Visitor Center and Museum. It will include seating, water features and landscaping to enhance the visitor experience.
- **Lower Paseo** - The Lower Paseo is the integrated link between the famed San Antonio River Walk and Alamo Plaza, running through the Hyatt Hotel. The current link will be totally renovated, with new water features, landscaping, seating, a new vertical transportation system and feature staircase to connect up to the Plaza.
- **Alamo Gardens** - The 1936 Gardens have a distinctively different character than the nearby historic buildings and spaces. In addition to providing potential special event space, they will also house a future building featuring collections storage and flexible exhibit space for the Alamo.
- **Event Center** – The current Gift Shop in the Gardens will be renovated into an additional event space to showcase a private dining room, Bride's Room, Groom's Room and garden courtyard.

- **Education Center** - Situated in Alamo Plaza, the Alamo Hall/Annex offers an opportunity to accommodate educational programming, research, and visiting lecturers. The Education Center will have a space for guest lectures, classrooms, a distance learning studio and offices.
- **Cenotaph Restoration** - The historic Cenotaph will remain in its current location to play a central role in highlighting the memorial character of the site.

Project Budget

The total capital budget for the project is approximately five hundred million US dollars (USD \$500M). This budget is “all-in” including all hard and soft costs necessary for the design and construction of the buildings and interior spaces including all functional mechanical, electrical, plumbing (MEP), furniture, fixtures and equipment (FFE) and exhibition work.

This work has begun already, and each phase will have its own funding streams, project partners, and schedule. The whole Alamo Plan, including all the subcomponents mentioned above, will be completed in early 2026.

This RFQ addresses this need and discusses services sought for the project/construction management of the Alamo Plan for Alamo Trust, Inc.

REQUEST FOR QUALIFICATIONS

1. Overview. This Request for Qualifications ("RFQ") is an invitation to a prospective service provider to submit a proposal for the provision of services.
 - a. Term. Alamo Trust, Inc. ("ATI") is seeking a project/construction management firm ("Provider") to begin services on or about November 1, 2022.
 - b. Capabilities/Service Level. The Provider considered for this project should:
 - i. **General**: Have ample previous experience with project and construction management.
 - ii. **Prior Experience**: Showcase work with other non-profit organizations, historical sites, museums or cultural institutions, public facilities and/or governmental agencies.
 - iii. **Leadership**: Demonstrative ability to clearly delineate goals and objectives, delegate, participate in technical problems and unify team members toward project goals.
 - iv. **Technical Expertise**: Understand the technologies involved in the design and construction; ability to communicate with technical teams and assist in problem solving.
 - v. **Administrative Skills and Abilities**: Ability to provide project planning, establish and maintain reports and review systems, establish and maintain project controls, establish and maintain time and cost objectives.
 - vi. **Organizational Skills**: Ability to build effective project teams, manage conflicts, communicate both orally and in writing with all levels of personnel, foster a work environment conducive to teamwork with all parties involved, including ATI.
 - vii. **Insurance**: Provider will present a certificate of insurance for professional malpractice liability insurance and other insurance as required by ATI from an insurance carrier authorized to do business in the State of Texas.
 - c. Confidentiality. All information concerning this RFQ, including any related information that is subsequently disclosed by ATI during the RFQ submission process, is ATI's confidential information. The Provider will not disclose such information or use it for any purpose other than responding to the RFQ without ATI's prior written consent, except as required by law. ATI will not disclose any non-public information in the Provider's response to this RFQ, provided that such information is identified as non-public and confidential in the response. Submission of an RFQ constitutes acceptance of these terms.

- d. Not Binding. Except for the confidentiality obligations set forth in Section 1c – Confidentiality, this RFQ is a solicitation of proposals and proposals only and neither the issuance of this RFQ nor the submission of a responsive proposals shall be binding on ATI or the Provider. ATI reserves the right to accept or reject any or all proposals or to cancel this RFQ for any reason or no reason. No binding agreement shall exist with respect to the provision of services unless and until a definitive agreement has been agreed and executed by both ATI and the selected Provider. ATI will not be liable under any circumstances for any expenses incurred by any bidder in connection with the RFQ submission or selection process.
- e. Professional Services Agreement. ATI intends to enter into a Professional Services Agreement (“**Agreement**”) with the selected Provider to this RFQ. ATI also intends to draft, negotiate, and attach to the Agreement the requirements for insurance, liability, and indemnification, as well as the scope of services. This Agreement could cover selected parts of the project, or it could cover the entire project. ATI can select Provider’s qualifications that in the judgment of ATI best meets its needs for Agreement negotiation. **Importantly, this Agreement will also require the selected Provider to sign a Non-disclosure Agreement. Provider may also be required to undergo a Background Check, if deemed applicable.**

2. Scope of Services. The Provider’s scope of services may include, but shall not be limited to the following:

- a. Provide a Construction Management control system for the purposes of constructing the new Facility. The system shall insure that no unauthorized change orders or material substitutions occur without written approval of ATI.
- b. Coordinate and manage a construction and startup team consisting of representatives of ATI and the consultant design team, etc.
- c. Coordinate all public hearing and public information releases required by ATI, concerning the Site. All communications will be approved through the ATI Communications Department.
- d. Coordinate all consultants selected by ATI for the proposed project, including architects, engineers, etc.
- e. Coordinate all required reports, permits, planning activities or other activities with other governmental agencies involved with the Site.
- f. Provide and manage the competitive process for the selection of construction contractors, subcontractors, material suppliers or other vendors in accordance with Federal, State or Local statutes/ordinances. The Project Management / Construction Management Firm will manage the process of competitively bidding all construction contracts for ATI. The Construction Management firm will be

responsible for monitoring project cost and schedule review as well as overseeing the quality control process and safety programs of the contractors on the project.

- g. Coordinate, manage, and conduct all construction inspection activities required by ATI.
- h. Coordinate with the design teams and provide updated cost estimates and a master schedule on a monthly basis or as required by ATI. Provide value engineering options and constructability reviews as required to maximize the value for ATI.

3. Proposal Submission Requirements. The proposals must include the following information about the Provider.

a. Provider's Background. Provide an overview, including:

- i. History. A brief history and description of the Provider, including any specialties. Additionally, list all partners within the last five (5) years.
- ii. Expertise and Experience. A detailed description of the Provider's expertise and experience, including a description of the most unique qualifications as it relates to the proposed project.
- iii. Services. Describe the services the Provider offers to its clients.
- iv. Past Projects. Information about past performance, demonstrating the quality of similar services provided to other companies like ATI, including experience with this specific service. Furthermore, list a maximum of five (5) projects for which the Provider/proposed team provided services, particularly if associated with this specific project/service. Provide the following information for each project listed: Project name and type and size of project; Date(s) of service; Project owner; Description of service(s) provided for the project; Provider team members involved; Consultants involved, if applicable.

(i) Please include whether the project: a) was a renovation/restoration v. new build project, b) included experience in management of Construction Management Services delivery method, c) included pre-construction activities such as constructability reviews, cost estimating and scheduling, and d) included working with historic structures.

- v. Current projects. Provide a current list of active projects that would include the proposed team members for this project. List a minimum of five (5) clients along with at least three (3) references for each project profiled, including name, title, role in the project and contact information (telephone number and e-mail). In addition to images of the work, please provide a brief summary documenting:

(i) Scope of services for the project

(ii) General description of client's needs and goals and how these goals were met

(iii) How excellence in your scope of services was maintained through the project

(iv) Total budget for your services

(v) Total budget for the project

(vi) Any awards or recognitions received

vi. References. Provide references for any three (3) of the past projects above to include: Project owner's name, e-mail, and phone number; Owner's representative (who served as the day-to-day liaison of the project) name, e-mail, and phone number.

vii. Interest. Provide a brief statement of interest for this project, include Provider's understanding of The Alamo.

viii. Commitment. Provide a statement about the Provider's availability and commitment.

ix. Legal proceedings. Has your firm ever been involved as a defendant in any action contesting performance?

b. Provider's Team. Provide proposed team members.

i. Team. Include Provider's management team and key personnel as depicted by an organizational chart showing the roles of the entire proposed team.

(i) How will your work be organized and staffed for ATI?

(ii) Please indicate where key personnel (Project Manager and Construction Manager) will be officed.

ii. Resumes. Provide resumes of all proposed team members for this project.

iii. Staffing Levels and Duties. Include staffing levels for the services, along with proposed duties for each team member.

iv. Consultants/Subcontractors. Provide anticipated consultants and/or subcontractors, if applicable.

(i) Propose a complete team of consultants/sub-contractors with whom you have developed a successful relationship capable of delivering a technically complex, publicly visible, architecturally important, and sustainable project.

- v. Other. Include any other information deemed necessary to represent company and team members' experience.
- c. Methodology. Provide a detailed description of the Provider's proposed solutions and strategies for meeting the requirements of this project. Include information about key assumptions on which the proposal is based. As applicable, also include information about:
- i. Services. Provide a detailed list of Provider's services included in your qualifications.
 - (i) Describe Provider's proposed Construction Manager in comparison to the skills and abilities listed.
 - ii. Workplan. Provide an hourly workplan indicating proposed staff and projected hourly effort corresponding to the Deliverables.
 - iii. Implementation. Provide a plan for implementation of and transition to the Provider's solution.
 - iv. Timeline. Provide an overall timeline to accomplish the project.
 - v. Communication Skills.
 - (i) Demonstrate the ability of the proposed Project Manager and Construction Manager to communicate and resolve issues and present information clearly and concisely, both in written and verbal format.
 - (ii) Demonstrate the aptitude of the proposed Project Manager and Construction Manager to communicate with the various members of a project team (i.e., ATI, architect, general contractor, exhibit designer, estimator, etc.)
 - (iii) List any specific software or systems you use to communicate with your clients.
- d. Estimation of Costs. Describe how Provider approaches fees for these types of projects, including:
- i. Fees as a retainer, fixed fee based, percentage of costs or another approach
 - ii. Cost associated with monthly/quarterly/yearly options
 - (i) What conditions would change the agreed upon charges?
 - (ii) What conditions or requests would fall outside the scope of services?

(iii) What is the standard pricing for out-of-scope requests (flat rate or hourly), if applicable?

(iv) What is the outside of business hours pricing for out-of-scope requests (flat rate or hourly), if applicable?

- iii. Costs of anticipated direct and/or indirect expenses
- iv. Costs of any additional or out-of-scope services
- v. Information about payment terms (i.e., deposits required, frequency of billing, etc.)

4. ATI Contact Information. ATI's Project Contact is the point of contact for this RFQ. Please direct all communications to those listed below.

Project Contact:	Tracy Beach Executive Administrative Assistant
E-mail:	tbeach@thealamo.org
Mailing Address:	321 Alamo Plaza Suite 300 San Antonio, TX 78205
Phone Number:	210-225-1391
With a copy (cc) to:	alamoplan@thealamo.org

5. RFQ Timetable. The following table sets out key dates during the RFQ process.

ACTIVITY	DATE*
RFQ Issue Date	Tuesday, September 20, 2022
Deadline to sign-up for Pre-Submission Conference	Wednesday, September 28, 2022, at 5:00 PM CST**
Pre-Submission Conference***	Thursday, September 29, 2022, at 11:00 AM CST
Proposal Submission Deadline	Friday, October 7, 2022, at 5:00 PM CST
Anticipated Interview and Selection	Friday, October 21, 2022
Agreement Negotiation Period	Monday, October 24 to Monday, October 31
Anticipated Agreement Start Date	Tuesday, November 1, 2022

*Except for the Proposal Submission Deadline, all other dates are subject to change.

**CST = Central Standard Time

***As part of the RFQ process, a Pre-Submission Conference will be held, details forthcoming. This will afford the Provider the opportunity to address questions regarding the RFQ. Attendance at the pre-submission conference is not mandatory or required for submission eligibility. To attend this pre-submission conference, please e-mail the Project Contact by the deadline indicated above.

6. RFQ Submission

- a. Deadline. RFQ submissions must be received by the submission deadline. Submissions must be confirmed as received by ATI before the hour and date specified in Section 5 – RFQ Timeline to be considered. Submissions received after the deadline will not be considered.
- b. Format of Submission. All RFQ submissions must be submitted via e-mail to the Project Manager and cc email listed in Section 4 – ATI Contact Information. Submissions will only be accepted electronically in pdf format as an attachment to the e-mail. Submissions should strive to be as simple and succinct as possible answering the questions listed in Section 3 – Proposal Submission Requirements. Please include a Table of Contents for the RFQ and provide page numbers for each section of the RFQ response. Paper hard copies of the submissions will not be accepted.
- c. Acceptance of Terms. Submission of this RFQ indicates that the Provider has read and understands the terms of this RFQ, as well as all the information included within the RFQ.

7. Evaluation Criteria. ATI will review and evaluate multiple criteria to select the most appropriate Provider. The evaluation of submissions will be based on required information provided by the Provider. The major qualitative areas that ATI will evaluate include but are not limited to the following:

- a. Provider's firm strength and stability
- b. Provider's assigned personnel qualifications and experience, especially of the individuals/team members that will oversee and perform the services, along with their availability.
- c. Provider's breadth and depth of experience and expertise as a whole in the performance of project/construction management or similar experience on projects like this one (i.e., public safety facility experience)
- d. Responsiveness and completeness of Provider's submission
- e. Demonstrated client service and support
- f. Provider's submission of comparable past and current projects based on client references especially where comparable work was performed

- g. Demonstrated understanding of ATI's needs and the proposed method of approach/services.
- h. Provider's reporting/communication capabilities
- i. Contractual and financial considerations
 - i. Contractual terms and fee negotiations will occur upon selection; if the contract or fee negotiation is unsuccessful, ATI reserves the right to negotiate with other finalists in the selection process.

8. Formal (Oral/In-Person) Interview. ATI may invite one or more of the most highly qualified Providers to attend a formal interview to further discuss their RFQ and to respond to questions from ATI before making a final selection. Selection of the Provider will be based on subjective best value judgements as determined by ATI based on the RFQ submissions.

- a. This formal interview will be a mandatory walk through of the project and key personnel should be in attendance.