

Schlitz Audubon Nature Center (SANC) is requesting proposals for professional services to complete the planning and design phases of a fish and wildlife restoration project for the Cleaver property, a 38.68-acre satellite property of SANC located at the southeast quadrant of the intersection of Brown Deer Road and the Milwaukee River.

Project Background

The Cleaver property's location on the Milwaukee River (Attachment A) is within a primary environmental corridor, and its diverse wetland and rare ephemeral pond habitat drive the biological diversity throughout this corridor. However, the quality of the upland and aquatic habitat is degraded and in need of restoration. For example, the ephemeral ponds on the property provide much needed habitat for salamander populations, however, these ephemeral ponds have succumbed to invasive plant species and are in dire need of improving hydroperiods to better support semi-aquatic wildlife species. The forested portions of the property are overgrown with invasive undergrowth species that threaten rare native habitat in the Milwaukee River corridor. In addition, a portion of the property was once a Department of Transpiration landfill, which has left buried and exposed concrete rubble in some areas. The river's main channel, side channels, and backwater habitats are capable of providing important fish cover for native species and serve as future spawning and/or nursery habitat for



recovering native species (ex. lake sturgeon and northern pike), however the project area currently lacks the appropriate connectivity, cover, and substrate.

AOC Focal Species

A list of critical fish and wildlife species has been developed for the AOC, these “focal species” are the species whose populations the AOC restoration work must improve the likelihood of supporting. The focal species groups for the Cleaver property include breeding birds (forest, wetland and grassland), burrowing crayfish, turtles, snakes, frogs, salamanders, and native fish. More information about focal species can be found in the Degradation of F&W Populations [BUI](#) Management Action List (available [here](#) on the WDNR Milwaukee Estuary AOC website)

As an AOC F&W populations project, all restoration actions for the Cleaver project need to provide a direct benefit to the AOC focal species groups that are present, or have the potential to be supported, within the project area. The definition of “support” varies for each focal species group, but in general a wildlife species will be considered supported when breeding behaviors are documented for at least two years. Documentation of breeding behaviors will be conducted under a separate AOC-wide monitoring plan and is beyond the scope of this project.

The in-water habitat restoration work is intended to provide spawning and/or nursery habitat for AOC fish focal species such as lake sturgeon and contribute to improving the warmwater index of biotic integrity (IBI) of the Milwaukee River by providing habitat features to support native fish species such as northern pike. The Consultant will be provided with the specific names of the AOC wildlife focal species (60 species of breeding birds (forest, wetland, shrubland, grassland, air space), 3 species of burrowing crayfish, 8 species of frogs, 5 species of salamanders, 4 species of turtles, 8 species of snakes, and 5 species of mammals) and a list of those focal species that have been identified on the Cleaver property.

It is important to note that in addition to the focal species, there are several non-focal species that must be considered with a “do no harm” approach. These species are not to be the sole target for restoration actions but must be considered during the development of restoration actions to ensure negative impacts to these species are minimized. There are multiple species for “do no harm” consideration at the Cleaver Property, most notably the mussel population is of rare quality and care must be taken to avoid harm to the mussel beds when designing aquatic habitat enhancements for fish. A list of known species to be considered with a “do no harm” approach will be provided to the Consultant.

Scope of Work Overview

Work for this project will be divided into concept planning and final design phases. Public and technical meetings will occur throughout both phases of the project. The concept planning phase will include drafting and gaining approval of a Quality Assurance Project Plan (QAPP), review of existing data, field surveys and assessments, hydrologic and hydraulic analysis, focal species evaluations, and the development of design alternatives and a final concept plan. Developing the design alternatives will include providing at least three restoration alternatives and a list of à la carte habitat features that could be incorporated into any of the design alternatives to benefit focal species. Examples of habitat features include bird nesting platforms, large wood, turtle nesting shoals, and excavated rivulets for spawning. The alternatives and habitat features will be reviewed by the Project Team (project managers from the consultant, SANC, and WDNR) and F&W Tech Team. After review, a final concept plan will be developed based on the selected alternative and

selected habitat features. The concept plan will become the basis for the final restoration design. The final design phase deliverables will include a design report, technical specifications and drawings, and a bid package. The consultant will also assist with and complete all necessary permit applications and provide supporting materials for the US Fish and Wildlife Service's Section 7 process.

The design consultant may be retained as the oversight consultant for the implementation phase of the project. However, retaining the design consultant for oversight services is at the discretion of SANC and is subject to performance and availability of funding.

Project Tasks and Deliverables

All deliverables will be provided in electronic format as draft and reviewed by the Project Team with adequate time prior to being finalized.

Task 1: Project administration

The Consultant will submit monthly reports and invoices to SANC through the duration of the project. The reports should detail tasks and activities completed during the reporting period and activities anticipated for the next reporting period. Timely submissions of monthly reports are required throughout the project.

Deliverable(s):

- a) Monthly Reports and Invoices

Task 2: Project Meetings

The Consultant should be prepared to participate in the following Project Team meetings. For each meeting, the consultant shall prepare agendas and take meeting minutes.

1. **Project Kick-off Meeting:** Within three weeks of issuance of the Notice to Proceed, the Consultant will coordinate, prepare for, and attend a project kick-off meeting to be conducted in-person at the Schlitz Audubon Nature Center. The kick-off meeting will also include a group walkthrough of the Cleaver Property. Consultant staff in attendance shall include the Project Manager, Principal in Charge (if available), and all key personnel, including sub-Consultants. The purpose of the meeting will be for staff to meet and to discuss general topics such as project goals, procedures, issues, schedule, QAPP, information needs, and to become familiar with the property.
2. **QAPP Review and Coordination Meetings:** At least two coordination meetings with SANC and WDNR towards the development and review of the QAPP. If a formal agenda is created it will be provided by SANC or WDNR, but the primary function of these meetings will be QAPP review and coordination with SANC and WDNR.
3. **Progress Meetings:** Coordinate, prepare for, and attend monthly one-hour progress meetings for the duration of the project with SANC and WDNR Project Managers, and other project team members as needed. Meetings will discuss the following information but are not limited to project status, schedule, deliverables, issues affecting the project progress, potential issues that may arise, budget, the following month's activities, and action items. The meeting agendas must be prepared by the Consultant and distributed at least three business days prior to each meeting. The agenda shall include a list of topics that require discussion, including issues raised by the Project Team, and

a list of data and information that are requested. The meeting minutes shall be prepared by the Consultant and distributed within four (4) business days of the meeting.

4. **Project Team Planning/Review Meetings:** Whenever possible, planning and review discussions will occur during the monthly Progress Meetings, however the consultant shall coordinate, prepare for, and attend separate Planning and Review meetings as needed throughout the project. These meetings will be convened to discuss specific deliverables including draft and final deliverables, public meeting coordination, and incorporating public/technical feedback, and may require attendance of additional personnel, such as technical experts. Minimally, there will be meetings to review the draft plans at concept (30%), mid design (60%), near final (90%) and final design (100%) stages; these deliverable review meetings listed will be held in-person at Schlitz Audubon Nature Center, other planning/review meetings may be held virtually.
5. **Outside Technical Review Meetings:** Tech Team presentations shall occur during the 30%, 60%, and 90% draft stages. Tech Team meetings may be virtual, in-person, or hybrid at the discretion of the Tech Team in consultation with the Project Team. Hybrid meetings may be held at SANC or WDNR Southeast Regional Headquarters in Milwaukee (location to be determined by the Tech Team). The Consultant will be primarily responsible for planning the meetings, preparing agendas, preparing meeting materials such as presentations, handouts, and exhibits, drafting meeting minutes, and summarizing feedback.
6. **Public Information Meetings:** The Consultant should plan for preparing materials, presenting, and attending two public information meetings, one during the planning phase and one during the design phase. Public meetings will be convened by SANC with support of the Consultant, in consultation with the WDNR, Waterway Restoration Partnership (WRP), and Community Advisory Committee (CAC). Public meetings will be held in-person at SANC and may include recording presentations for publishing on project websites.

Deliverable(s):

- a) Meeting agendas and minutes
- b) Copy of any meeting materials (posters, presentations, exhibits, notices, etc.)
- c) Summary of Tech Team feedback
- d) Summary of Public Information meeting feedback

Task 3: Quality Assurance Project Plan

Develop a Quality Assurance Project Plan (QAPP) for the project. The overall purpose of the QAPP is to define the successful project outcome based on the objectives, data inputs from available resources, and required technical skills to complete the work. The QAPP will outline the procedures used to ensure the data meets the project requirements. The QAPP will include, but is not limited to, project management activities, a historical data review, field surveys and assessments, planning and design, and maintenance plan development. Please see [EPA Quality Assurance Project Plan Standard](#) for more information about what should be included in the QAPP. A QAPP template with writing prompts will be provided to the Consultant, and example QAPPs from similar projects, if available, will also be shared to assist in QAPP preparation. The QAPP and any

amendments shall be submitted to the WDNR in electronic format for approval. It should be noted that the QAPP must be formally approved by WDNR prior to conducting any other work, including review of historical and existing data.

Deliverable(s):

- a) Approved QAPP(s) in electronic format and any subsequent updates or amendments

Task 4: Historical and Existing Data Review

Conduct a desktop review of existing available data for the project area. The Consultant will need to compile publicly available information from sources that include, *but are not limited to*:

- eBird
- HerpMapper
- Breeding Bird Atlas
- USGS topographic maps and stream gauges
- Surface Water Data Viewer and SWIMS data for nearby stations
- National Weather Service precipitation data
- USDA soil maps
- SEWRPC Data
- Effective FEMA Hydraulic Model
- Wisconsin Wetland Inventory
- DNR and Milwaukee County Lidar Data

In addition to publicly available information, the Consultant will receive the following data from SANC and WDNR for review:

- Focal species GIS data for the project area and 1-mile buffer
- UWM cultural resources assessment report
- Natural Heritage Inventory (NHI) report and US Fish and Wildlife Services (USFWS) Information for Planning and Consultation (IPaC) official species list
- WDNR side scan information and bathymetry data
- 2018 Wetland delineation

Deliverable(s):

- a) Copies of data or information generated in electronic format

Task 5: Regulatory Due Diligence, Compliance, and Permitting

1. **Threatened and Endangered (T&E) Resources:** WDNR will provide an Endangered Resources report, IPaC official species list, and will facilitate Section 7 consultation with federal partners. The Consultant will assist with completion of the required Determination Keys (DKey) in IPaC. This will likely include but is not limited to the Minnesota-Wisconsin Federal Endangered Species DKey, Northern long-eared Bat and Tricolored Bat Range Wide DKey, and Rusty Patched Bumblebee Rangewide DKey. Any recommended or required avoidance measures related to threatened and endangered species and habitats will be incorporated into the design's restoration actions. The Consultant will provide materials to support the Section 7 consultation process, including a summary of determinations and appropriate mitigation and conservation measures that were incorporated into the design.

2. **Cultural Resources:** WDNR will provide a Cultural Resources Assessment report to the Consultant and will facilitate the Section 106 consultation process with federal partners. The Consultant will need to incorporate any findings and recommendations identified in the report. The Consultant will provide materials to support the Section 106 consultation process, including a summary of measures that were incorporated into the design.
3. **Permitting:** The Consultant shall prepare applications and obtain all applicable federal, state, and local permits as required. Permit materials will be prepared to ensure compliance with the National Historic Preservation Act, National Environmental Policy Act, and Endangered Species Act. The Consultant will also file all necessary agency notices, such as WDNR Notice of Intent, wetland concurrence, etc., if applicable.

Deliverable(s):

- a) DKey preliminary determination letters
- b) Supporting Documentation for Section 7 consultation process
- c) Supporting Documentation for Section 106 consultation process
- d) Copies of all permit applications, notices, materials, and regulatory correspondence

Task 6: Field Assessments

The following field assessments of the property's current conditions are to be completed as part of the concept planning phase of the project and will inform design. The methods and findings of the assessments performed shall be documented in the concept plan design report.

1. *Upland Habitat Assessment* – Complete a baseline vegetative assessment that includes but is not limited to floristic quality assessments, vegetation conditions in the canopy, sub-canopy, shrub, and herb layers, and evaluation of dead and dying trees for canopy loss and potential safety hazards. The presence and abundance of invasive plant species and rare native plant species will also be documented. Photographs and measurements will be taken to document site characteristics.
2. *Geomorphic and Aquatic Habitat Assessment* – This will include a qualitative assessment of fluvial geomorphic features and aquatic habitat improvement opportunities at the site. Notable substrate cover and quantity of woody debris will be identified to determine areas of existing and potential suitable fish habitat. Identify potential areas for earthwork such as dredging to improve connectivity, grading to create emergent marsh, or excavating shallow and narrow rivulets along secondary channels to provide spawning habitat for Northern Pike. Photographs and measurements will be taken to document site characteristics.
3. *Presence/Absence Wildlife Assessment* – Assess the locations of potential restoration actions and habitat features for indications of usage by sensitive species. At a minimum, this shall include a burrow density mapping of wetlands to evaluate presence of snake/crayfish burrows and evaluating aquatic restoration locations for the presence of mussels. The intent is to collect GPS data of locations used by sensitive species to inform design, particularly where earthmoving might be proposed as an action. Previously collected GIS data for occurrences of focal species and mussels will be shared with the Consultant.
4. *Topographic and Bathymetric Surveys* – Topographic and bathymetric surveys of the entire project area. These surveys will be performed to understand site conditions,

evaluate sedimentation, and provide adequate data for design and Hydraulic Analysis. This will also include collecting data to update maps with the extent of the historic landfill as needed to inform feasibility of potential earthwork.

5. Hydrology Assessment – Assessment of the ephemeral ponds and wetlands will determine the source of the water and to whether there is potential to increase the depth and establish hydroperiods that further support focal species. Connectivity of the side channels and backwater to the main channel will also need to be evaluated for potential enhancements to support focal species.
6. Wetland delineation – perform and gain concurrence for a wetland delineation of the entire project area to be performed in accordance with the Corps of Engineers Wetlands Delineation Manual, the Regional Supplement to the Corps of Engineers Wetland Delineation, and Guidance for Submittal of Delineation Reports to the St. Paul District Army Corps of Engineers and Wisconsin DNR.

Deliverables:

- a) Maps of any data collected that include but are not limited to:
 - a. Maps of existing plant communities with survey points/transects and survey areas shown.
 - b. Maps of existing data collected and represented in a way to show baseline aquatic habitat features with survey points/transects and surveys shown.
 - c. Maps showing the results of the topographic and bathymetric survey
Maps showing burrow locations/density and mussel bed locations
- b) Raw data, including but not limited to, Microsoft Excel, GIS, and CADD files
- c) Photographs of field assessments, including but not limited to species identification verification voucher photographs. Photographs should provide needed information to inform future habitat enhancements and for species identification purposes.
- d) Reporting to Natural Heritage Inventory of the occurrence of any county, state, and federal rare, threatened, or endangered species observed
- e) Wetland delineation report and concurrence documentation

Task 7: Concept Planning and Report (30% Design)

The Consultant shall utilize the information from the data review and field assessments to develop at least three concept plan alternatives for fish and wildlife habitat improvements to benefit focal species. These alternatives should be presented in a manner that allows the Project Team to visually compare the impact the alternative will have on focal species. The Consultant shall also prepare a collection of a la carte habitat features that can be incorporated into the concepts. The alternatives and habitat features will be reviewed by the Project Team in consultation with the Tech Team and a final concept plan will be selected. A cost estimate and implementation timeline will be developed for each proposed alternative, habitat features, and for the final concept plan.

In addition to incorporating new and existing data, developing the concept plan alternatives and final plan must include an evaluation of Focal Species, considerations for project resiliency, and hydraulic modeling.

1. Focal Species Evaluation and Matrix

The intent of the restoration project is to improve habitat to support breeding populations of AOC focal species. To ensure each proposed action and habitat feature

will benefit focal species, the Consultant must document the potential impacts of those actions for focal species. This will be done through a narrative component and by completing the Focal Species Evaluation Matrix (Matrix). The Consultant must also document impacts to “do no harm” non-focal species of concern.

The species evaluation component of this project is expected to be completed by personnel with fish and wildlife expertise. The qualifications of individuals tasked with completing the evaluation must be explained in the Consultant’s proposal response. At a minimum, the concept plan phase evaluation of focal species must include the following:

- Narrative for each alternative, each additional habitat feature, and the final concept plan describing the potential benefits to focal species at the group level. The narrative should also address potential negative impacts to species groups. The focal species groups include breeding birds (forest, wetland, shrubland, grassland, air space), burrowing crayfish, frogs, salamanders, turtles, snakes, mammals, and fish (northern pike and sturgeon).
- Focal Species Evaluation Matrix: at a minimum, a simplified version of the Matrix shall be completed for each alternative and the final concept. The Matrix will evaluate the impacts restoration actions may have on focal species at the group level. A template of the Matrix is provided as Attachment B.

2. Project Resiliency

The Great Lakes region is expected to experience warmer and wetter weather, increased storm severity, and extreme high and low water levels. In addition, sedimentation may occur over time in the river channel and/or side channels. These events can result in habitat degradation and loss, thereby negatively impacting fish and wildlife populations. In recognition of the need to protect this project’s investment in habitat restoration to support focal species populations and ensure the long-term success needed to meet AOC delisting goals, the Consultant shall incorporate resiliency into the concept plan alternatives and final concept plan. To assist in resiliency planning, the Consultant shall:

- Complete the [NIACS Quick Guide to Adaptation Planning](#) with input from the Project Team. Identify potential impacts, vulnerabilities, and opportunities to enhance long-term resiliency of proposed restoration alternatives.
- Provide a summary of how resiliency was incorporated into each alternative and the final concept.

3. Hydrologic and Hydraulic Analysis The consultant shall develop hydraulic models (HEC-RAS) using survey data and historical data for the project reach to assess existing hydraulic conditions within the site and proposed conditions to meet project objectives through habitat modifications. This should include determination of Milwaukee River flow rates, including a series of flow rates that reflect anticipated conditions during seasons relevant to target habitat functions, flow rates to determine critical conditions for riverbed and bank stability, and the regulatory flood flow. The regulatory flood flow shall be modeled using a 1D HEC-RAS model for existing and proposed conditions to demonstrate no rise to the flood elevation. A no-rise technical memorandum shall be

prepared and stamped by the consultant's professional engineer. Given the complexity of this reach, the consultant should anticipate using a 2D model to determine habitat conditions and shear stresses at various flow rates. Sensitivity analyses must be conducted for uncertain model input variables to determine the level of confidence in the model results. No Conditional Letter of Map Revision (CLOMR) is anticipated for this project.

4. Concept Design Report

The alternatives and final concept shall be documented in a Concept Design Report. This report will at a minimum include the following components:

- Project Objectives and Design Criteria - Definition of project objectives as discussed with the project team and Fish and Wildlife Tech Team. This section will include specific habitat functions to be restored and the design criteria for achieving those functions.
- Data Review and Field Assessment Summary – Summarizes the data reviewed and collected to develop the restoration approaches. The summary should explain methodology, the findings, and how the data informed the concept plan alternatives and final concept plan.
- Restoration & Management Actions – Evaluate project area suitability for focal species and provide a narrative that discusses potential restoration measures and habitat features in feasible locations. The report should also identify constraints limiting restoration opportunities, and incorporation of resiliency measures identified in the NIACS workbook, cultural resource considerations, and T&E species mitigation measures. The draft report will include discussion of at least three alternatives for restoration with a description of what benefits each alternative provides for focal species groups. The potential habitat features and their benefit to focal species should also be discussed. The final report will also discuss the final selected alternative and the anticipated impacts to focal species.
- Project Timeline – Provide estimated timeframes and ideal schedules for successful implementation of each alternative and a detailed timeline for the final concept based on best management practices.
- Cost Estimates – Provide an estimate of probable cost for implementing each alternative, habitat features, and for the final concept plan.

Deliverables:

- a) Draft and Final Concept Design Report as described above that includes but is not limited to:
 - a. Concept plans for at least three alternatives, a list of additional habitat features, and one final selected alternative
 - b. Narrative of focal species impacts
 - c. Cost estimates for each alternative, habitat feature, and final concept plan
 - d. Project timeline for each alternative and final concept plan
- b) Focal Species Evaluation Matrix (group level) for each alternative and final concept

- c) No Rise Technical Memorandum (stamped by WI-licensed engineer)

Task 8: Final Habitat Restoration Design (60%, 90%, and Final Design)

The final concept plan for proposed habitat enhancements to benefit fish and wildlife will be the basis for the final design plan. Engineering plans and drawings should be accompanied by technical specifications and the Consultant shall compile a bid package suitable for bidding. Final design should also include a design report that provides an overview of the design, summarizes any additional data or information not included in the concept plan report, evaluates the final restoration actions and habitat features for focal species impacts, and describes any necessary mitigation measures.

1. Focal Species Evaluation and Matrix

The Consultant is expected to further evaluate focal species by determining which of the specific AOC-wide focal species (species list provided) have the potential to be supported by habitats within the project area based on the individual habitat requirements of each species during their respective breeding seasons. This may include considerations such as patch size, vegetative cover, and food sources. Secondary considerations will be made for supporting focal species outside of their breeding season or for other habitat needs, such as providing foraging grounds to focal species that may be breeding nearby. This project-specific list of focal species must be reviewed and approved by SANC and WDNR prior to evaluating the restoration actions impact to individual species.

At a minimum, the design phase evaluation of focal species must include the following:

- a. Narrative describing the design's intended benefits to the project-specific focal species. The narrative should also address potential negative impacts to focal species, and any mitigation measures necessary to reduce the negative impacts.
- b. The Matrix will document the habitat requirements for focal species and evaluate the impacts of each restoration action and habitat feature on the project-specific focal species. A template of the Matrix is provided as Attachment B.

2. Engineering Plans and Technical Specifications

Provide preliminary engineering plans and technical specifications at the 60% design stage and detailed revised versions for the 90% and final design stages.

3. Design Report

The design report will be reviewed at the 60%, 90%, and final stage and include but is not limited to the following components:

- *Project Objectives and Design Criteria* – Objectives and criteria determined during the concept design and any refinements or modifications to them during the final design will be detailed in the final report.
- *Hydraulic Conditions* – The report shall include a description of the hydrologic and hydraulic analyses completed and demonstration that hydraulic conditions meet design criteria for the proposed design.

- *Restoration & Management Activities* – Descriptions of all proposed restoration and maintenance activities. The report should also identify constraints that may limit implementation, and incorporate resiliency measures, cultural resource considerations and T&E species mitigation measures. The report will include discussion of the impacts each restoration action is intended to have on project-specific focal species and any necessary mitigation measures to reduce potential negative impacts. The Matrix shall be completed for the project-specific list of focal species and evaluate the restoration actions and habitat features with enough detail to be representative of the final design.
- *Project Timeline* – Provide estimated timeframes and ideal schedules for successful implementation based on best management practices (BMP).
- *Cost Estimates* – Provide cost estimates for restoration activities (per acre or another unit of measurement).

4. Maintenance Plan

For review at the 60% plan stage, a Maintenance Plan will be prepared for use by the contractor during implementation and post-implementation by SANC staff and volunteers. This should provide a detailed outline of the annual activities required to manage the project area and maintain desired conditions to meet AOC, SANC, and Partner goals, including detailed information about prescribed burns and the necessary requirements/conditions, if applicable.

5. Bid Package

The bid package will be reviewed at the 90%, and final stage and must include, but is not limited to, the following components:

- Drawings, specifications, special conditions, invitation to bid, and contract documents
- A list of construction submittals required by the contract documents
- Bid form
- Construction memorandum for the construction manager that describes special or unique construction conditions that require distinct attention by the Consultant and/or construction manager. The memo should have enough detail to serve as a guide to field personnel during construction.

Deliverable(s):

- a) Engineering Plans and Technical Specifications (60%, 90%, final)
- b) Design Report, including focal species narrative, project timeline, and cost estimates (60%, 90%, final)
- c) Matrix (60%, 90%, Final)
- d) Maintenance Plan (60%, 90%, final)
- e) Bid Package (90%, final)

Task 9: Implementation Oversight - Contingent

A Consultant will be hired initially to complete the scope of services through **Task 8**. SANC may, but will not be obligated to, extend the Consultant's agreement to include Task 9 Implementation

Oversight. SANC, at its own discretion, reserves the right to pursue the process of hiring a different Consultant for Task 9. Extending the Consultant's contract to include Task 9 is based on performance and availability of funding. The scopes and fees will be reviewed and renegotiated, if necessary, at the time consideration is given to adding the next phases of work to the Consultant's contract.

The oversight consultant will provide support during the implementation bidding and award processes to assist SANC in procuring an implementation contractor. The oversight consultant will also be responsible for ensuring that the implementation contractor is completing the project in accordance with the specifications detailed in the design.

Tasks the oversight consultant will perform include, but are not limited to, the following:

- Bidding and Award Support
 - Making any final adjustments or updates to the bid package.
 - Attending the pre-bid meeting, project site tour, and bid opening.
 - Answer questions posed by perspective contractors.
 - Review bids and prepare bid tabulations.
- Oversight
 - Providing a resident inspector during construction.
 - Developing the implementation QAPP in coordination with SANC and WDNR.
 - Formalization and finalization of the timeline for site visits and coordination with the restoration contractor.
 - Conducting of site surveys to ensure successful implementation of the design as will be defined within the *Maintenance Plan*.
 - Review of contractor submittals and preparation of documentation or design adjustments in response to submittals.
 - Coordinate, prepare for, attend, and provide notes for one pre-construction and all weekly construction progress meetings.
 - Attendance of at least six (6) construction/restoration issue meetings.
 - Attendance at least one (1) substantial completion field inspection.

Task 9 will also include monthly project meetings for the duration of the project, public information and stakeholder meetings (1 per year of implementation), and monthly reporting (progress reports and invoices).

Deliverable(s):

- a) Final bid package and bid tabulation
- b) Approved QAPP and any amendments
- c) Meeting minutes and agendas
- d) Monthly reporting
- e) Materials generated for public meetings (posters, Presentations, fliers, etc.)
- f) As-builts

Project Timeline

The following timeline includes key dates for this project. Consultants must include a detailed project schedule with timelines for tasks and deliverables within their proposal response.

Task	Timeframe
RFP Posted and Consultant Selection	August-September 2025
Prepare and finalize QAPP	September -December 2025
Prepare 30% Design	January 2026- April 2027
Prepare 60% through Final Design	May - March 2028
Project Closeout	April 2028

Consultant Requirements

Minimum Experience

Due to the specialized nature of work related to native plant communities, fish, and wildlife within the project area, it is required that the Consultant, sub-Consultant(s), and primary employees (i.e., Project Managers) designated to the project have the following experience:

- a) At least five (5) years of experience successfully overseeing/implementing projects of similar scope and scale, including within but not limited to the following capacities:
 - a. As the primary focus of this project is habitat enhancement for fish and wildlife, it must be shown that either the prime or sub-Consultant have experience designing and implementing fish and wildlife enhancement projects, have experience designing natural river habitat projects, and have knowledge of native fish and wildlife and their needs in Southeast Wisconsin.
 - b. Planning comprehensive habitat restoration for fish and wildlife projects, natural areas ecological restoration and management, wetland design and installation, as well as experience working on federally funded projects and familiarity with reporting requirements (QAPP, Quarterly Reports, etc.).
 - c. Key staff responsible for these elements must be identified.

Insurance

The Consultant and sub-Consultant(s) will:

- a. Maintain worker's compensation insurance or self-insure for all employees engaged in the work.
- b. Maintain commercial liability and property damage insurance or equivalent protection against any claim(s) which might occur in carrying out this agreement/contract. Minimum coverage shall be one million dollars (\$1,000,000) liability for bodily injury and property damage including products liability and completed operations. Provide motor vehicle insurance for all owned, non-owned and hired vehicles that are used in carrying out the agreement. Minimum coverage shall be one million dollars (\$1,000,000) per occurrence combined single limit for automobile liability and property damage.
- c. Provide an insurance certificate indicating this coverage, counter-signed by an insurer licensed to do business in Wisconsin, covering the period of the agreement/contract. The insurance certificate is required to be presented prior to the issuance of the purchase order or before commencement of the agreement

Indemnification

The consultant and sub-Consultant(s) will agree to save, keep harmless, defend and indemnify the Friends of Schlitz Audubon Nature Center Inc. and all its employees and agents, against any and all liability, claims and costs of whatever kind and nature, for injury to or death of any person or persons, and for loss or damage to any property (state or other) occurring in connection with or in any way incident to or arising out of the occupancy, use, service, operation or performance of work in connection with this agreement or omissions of consultant's and sub-Consultant's employees, agents or representatives.

Proposal Content

a. A. Title Page

The title page must also include the name of the proposing firm, address, telephone number, name and email address of the proposed Project Manager (PM), and the submittal date.

b. Cover Letter

This letter should be signed by the proposed PM and one Principal, and should state concisely, in no more than one page, the Proposer's understanding of the work to be performed, and the unique abilities of the firm to perform the work most effectively for SANC.

c. Table of Contents

The table of contents should identify the material by section and the beginning page numbers of each section. The proposal should be organized with bookmarks that match headings in the table of contents.

d. Organization Chart

Provide an organizational structure of the Consultant's project team, including the relationship of the sub-consultants to be used for this project. Include the name of the Principal-In-Charge of this project along with the name, occupation and title of the Project Manager who will oversee this project. The role of any subcontractor should be clearly defined.

e. Staff Qualifications

Proposers should describe the pertinent qualifications of the PM, project team, and any proposed subcontractors who would participate in this project. At a minimum, any staff represented in the Organization Chart must be represented in this section. The qualifications should include number of years of and type of experience for team members who would likely be directly involved in this project. Experience staff members gained prior to employment at the firm will be considered. Proposers may have up to 12 staff, but not more. Firms hoping to rank highly in this section will demonstrate project teams with multiple years of relevant experience and fish and wildlife expertise.

f. Project Examples

In this section, Proposers should include descriptions of at least three similar projects the firm has participated in the past 10 years and at least one similar project subcontractors have participated in the past 10 years. Each project example should clearly state the overall project scope and detail the firm's specific roles in the project. Further, each project example should

state which of the tasks listed above the firm completed as part of the project, and which staff from the proposed project team were involved with the project and their role in that project. Firms hoping to rank highly in this section will demonstrate the firm's involvement or completion of all the tasks and include as many of the listed staff members as possible.

g. Project Approach

In this section, Proposers should describe their approach to the Project Tasks given currently known information, in order to successfully complete the project. The project approach should also include a project timeline with anticipated deadlines for milestone deliverables, and descriptions of the challenges you anticipate in this project and how you propose to overcome them. If selected, this RFP will form the basis for negotiations of a final scope of work and project budget, but the final scope will be subject to change.

Firms hoping to rank highly in this section will describe how the available resources and/or acquiring new data will be used to inform their design. Highly ranked firms will also provide a carefully considered project approach with the emphasis on linking river habitat function to flow rates to be analyzed and modeling approach, improving habitats for Focal Species, detailing how their design process will consider these species groups to ensure the final design will result in the intended benefit, and will demonstrate a familiarity with the project area.

h. Cost Proposal (Table)

The proposal's total cost is not to exceed the grant funds available for this project of \$315,000. Proposals that exceed the stated available funds will not be considered. Cost proposals will be evaluated based on the total amount and how funds are allocated across the project tasks and project team.

Proposers must include a cost proposal table/matrix identifying costs for each task which includes names, classifications, hourly rates, and hours to be spent by each required task to complete this project as described in this RFP. Proposers should summarize by tasks and include a total amount in a highlighted cell. All salary, subcontractors, travel, expenses and materials costs should be listed and included in the amount. Any project services and corresponding costs that the Proposer feels were omitted from the RFP should be in the cost proposal on a separate line(s) and identified as an additional service. If selected, this Cost Proposal will form the basis for negotiations of a project budget but will be subject to change. The contract will be awarded for services through Task 8. Contracting Task 9 will be at a future date based on funding availability and performance. The not-to-exceed fee for Tasks 1-8 and Task 9 should be clearly stated and provided as separate sums in the cost proposal. Additionally, the proposer must fill out the Cost Proposal Summary provided as Attachment C.

Proposers should use up to four additional pages beyond their cost proposal table/matrix as needed in their Cost Proposal section for any assumptions and clarifications concerning their Cost Proposal. Further, the Proposer must include rate schedules for personnel, equipment, per diem, or other associated costs.

Once the proposer has completed the Cost Proposal table/matrix, they should convert it to a PDF and attach it to their Proposal. No mention of cost is permissible within the Proposal itself.

i. References

Provide at least three references for clients for whom you have provided habitat restoration design work, natural areas ecological restoration and management, and/or wetland design and installation. Provide contact name, address, email address, and phone number of each reference. SANC reserves the right to contact references who are not listed by the Proposer.

Proposal Evaluation Criteria

Proposals will be evaluated and scored according to the following table and ranked.

Staff Qualifications	30 points
Project Examples	20 points
Project Approach	30 points
Cost Estimate	20 points

A SANC evaluation committee will be established to evaluate all responsive proposals and to make a recommendation. Proposals will be evaluated as excellent to poor in each of the above categories.

Proposal Administrative Details

Electronic Submittal Requirements

Proposals must be submitted electronically as a PDF. The PDF must be attached to an email and emailed to Lisa Greco (Lgreco@schlitzaudubon.org). The email containing the proposal must be received by **September 5, 2025**. Email subject should be "Schlitz Audubon Cleaver Property Fish and Wildlife Enhancements".

Pre-Proposal Meeting

On **August 12, 2025** at 1:00 PM, a 45-minute virtual pre-proposal meeting will be held via Microsoft Teams: [Cleaver Pre-Proposal Meeting](#). This meeting is not mandatory and will include an overview of key project elements and time for questions and answers.

An opportunity to walk the Cleaver Property will be provided to proposers on **August 14th** from 8am to 12pm. Due to limited parking on the Cleaver Property (1111 E Brown Deer Rd River Hills, Wisconsin), proposers interested in attending the open house access hours should park at Badger Meter Park (3829 W Brown Deer Rd, Brown Deer, WI 53209), which is a short walk from the Cleaver Property. SANC Staff will be on site for the duration of the access hours to check-in visitors upon arrival, however there will not be a guided tour of the property.

Any questions answered in the virtual meeting or during Cleaver Property access hours will be considered preliminary and will be followed by an official written response incorporated into the response to any written questions received via email as noted below in the "RFP Questions" section.

RFP Questions

Questions are to be submitted to SANC via e-mail to dshuster@schlitzaudubon.org. Questions submitted via phone will not be accepted. Questions submitted after **August 19, 2025** at 4:30 PM, deadline will not be answered. Responses to the questions will be posted on the SANC website by August 26th.

Costs Incurred

Those vendors submitting Proposals do so entirely at their own expense. There is no expressed or implied obligation by the SANC to reimburse any individual or firm for any costs incurred in preparing or submitting responses, for providing additional information when requested by the SANC, or for attending and/or participating in any follow-up interviews and negotiation sessions.

Copyrighted Material

No documents or information that is developed and paid for under this initiative for SANC may be copyrighted by any consultant. All work products must be approved by SANC and will be retained as property of SANC. Documents should be in electronic format and should include unsecured pdfs and non-pdf versions (e.g. Word, Excel, jpg., etc.).

Confidential Matters: Vendor Data

If any information submitted in the Proposal is considered confidential or proprietary, the proposer must identify this information in their proposals.

Reassignment

The proposer may not reassign any portion of the work that is awarded as a result of this RFP, without prior written consent from SANC. In the event a member of the core project team departs the project, replacement personnel must be approved by SANC to ensure the project team maintains necessary qualifications.

Bid Rejection

SANC reserves the right to reject any or all bids, to waive informalities in any bid, and to accept any bid which they deem to best serve the interests of SANC.

Attachments

Attachment A: Project Area Maps

Attachment B: Focal Species Evaluation Matrix Template

Attachment C: Cost Proposal Summary