

**HOUSING AUTHORITY OF CLACKAMAS COUNTY
OREGON CITY, OREGON**

**REQUEST FOR PROPOSALS
PROFESSIONAL ARCHITECTURAL AND ENGINEERING SERVICES
FOR
THE RENOVATION OF HILLSIDE MANOR
2889 SE HILLSIDE ST; MILWAUKIE, OR 97222**

ISSUE DATE: NOVEMBER 27, 2017

DUE DATE: 12:00 pm (NOON) December, 18, 2017
LATE PROPOSALS WILL NOT BE ACCEPTED

Healthy Families. Strong Communities.

REQUEST FOR PROPOSALS**FOR ARCHITECTURAL AND ENGINEERING SERVICES FOR THE RENOVATION OF HILLSIDE MANOR**

The Housing Authority of Clackamas County (HACC) requests proposals from professional consultants to provide Architectural Design and Engineering services for the renovation of Hillside Manor.

Issue Date: November 27, 2017

Closing Date: 12:00 pm Monday, December 18, 2017

*Proposals are to be delivered by email **ONLY** to the RFP Contact. Late submittals will not be considered.*

Submit Proposals to: Housing Authority of Clackamas County
Attention: Mary-Rain O’Meara

By email: momeara@co.clackamas.or.us

RFP Contact: *For all questions, contact:*
Mary-Rain O’Meara
Housing Development Coordinator
Housing Authority of Clackamas County
Telephone: 503-650-3140
Email: momeara@co.clackamas.or.us

RFP Schedule

Milestone	Date
RFP for Architectural services issued	November 27, 2017
Optional Site Visit	1:00 pm Monday, December 4, 2017
Deadline for Questions	12:00 Noon, 12/11/17
Issue Final Addendum (if necessary)	December 12, 2017
Proposals Due to HACC	12:00 pm (noon) December 18, 2017
Review and Select Design Team	12/18/17 – 12/21/17
Conduct Interviews (if necessary)	December 21, 2017
Award Announcement	December 21, 2017
Contract Negotiations	12/21/17 – 01/11/17
County Board of Commissioners Meeting- Approval of Contract	January 18, 2018
Start Work	January 19, 2018

I. INTRODUCTION

A. Purpose

The Housing Authority of Clackamas County (HACC) requests proposals from qualified and experienced professionals that can perform the Scope of Work as described below.

As a result of this solicitation, HACC intends to award a single contract to the most qualified team (“Design Team”) providing architectural, engineering and related services for the rehabilitation of the Hillside Manor apartment building in Milwaukie, Oregon.

B. Housing Authority of Clackamas County

HACC is a division of the Clackamas County Department of Health, Housing and Human Services and is governed by a Board of Commissioners made up of the Clackamas County Board of Commissioners plus one Housing Authority Resident Commissioner. With an annual operating budget of approximately \$18 million, HACC maintains (545) Public Housing units, (1,651) Housing Choice Vouchers, and (357) units of affordable and special needs housing.

C. Property Description

Hillside Manor (located at 2889 SE Hillside St, Milwaukie, OR 97222) is a 9-story, residential tower, constructed in 1970. HACC has owned and operated the structure since following construction completion. The Manor is part of a larger development that also includes small 1 and 2 bedroom, single-family/duplexes (referred to as Hillside Park) and vacant land. The purpose of this proposal focuses on the renovation of the tower only.

The tower consists of a total of 100 units and is 78,500 sq. ft. within a single concrete structure (Please see floor plan diagrams – Exhibit A). The unit mix includes (96) 1- bedroom/1-bathroom (400-506 sf) units and (4) 2- bedroom/1-bathroom (648 sf) units. The primary, public entrance is located on the 2nd floor, which also contains an office and residential units. Additional residential units are located on floors three through nine. The ground floor is a ‘daylight’ basement consisting of laundry facilities, common rooms, storage, a small workout room, utility rooms and garbage facilities.

The building is a concrete frame with lightweight cast in place concrete floors. The roof deck consists of steel framing and a concrete topping slab with a built-up membrane finish. The exterior concrete walls have a painted finish and newer, vinyl, double-pane windows.

The site slopes towards the tower, which sits in a bowl with landscaping and pedestrian paths surrounding. There are 53 parking spaces in front of the tower with direct access to the public entrance on the 2nd floor. There is a community patio and gardening area off the back with direct access from the ground floor/basement community rooms.

The site has a single-point of access, from the east, off SE 32nd Ave. Access to the tower, specifically, is past the single-family residential development into the tower’s parking area. The site is adjacent to train tracks to the West. Total site area (including that for the homes and vacant land) is 3.21 acres.

D. Physical Condition

In 2015, HACC contracted with EMG to conduct a Physical Needs Assessment and Energy Audit (Please see Exhibit H). Based on the results of that report HACC decided to pursue Housing and Urban Development’s (HUD) Rental Assistance Demonstration (RAD) project-based conversion program.

As a part of the conversion program, HACC will be contracting with a separate firm to conduct the required RAD Physical Condition Assessment (RPCA). The RFP for the RPCA Consultant is being conducted at the same time as

this selection process. It should be assumed that the RPCA Consultant be considered a part of the larger Development Team, as one of the Owner's Consultants.

E. Financing

To achieve the anticipated scope of renovation, HACC intends to apply for Low-Income Housing Tax Credits (9%) during the next funding cycle.

F. Construction

HACC anticipates the procurement of a Construction Management/General Contractor (CM/GC) to provide services from the Scope of Work / Schematic Design Phase through Construction. The CM/GC will be an integral part of the Development Team providing constructability reviews, value engineering, scheduling, estimating, sub-contracting services and general contractor expertise. The inclusion of the CM/GC on the Development Team will help HACC to achieve an optimal design solution that is within budget and meets the aggressive project schedule.

II. SCOPE OF SERVICES

A. Overview

The most qualified Design Team will be selected to provide architectural, engineering and other related services for the design, permitting and construction administration of the specific scope of services outlined in Section II Part E - Specific Services Requested. The Design Team needs to exhibit strong qualifications, experience and expertise, either through in-house staff or sub-consultants, to provide the professional services required to meet the project's scope of work and schedule. In addition, HACC anticipates procuring a CM/GC team to complete the construction. The Design Team needs to exhibit recent and relevant experience working on project teams with a CM/GC.

B. Design Team

The successful Design Team, either through in-house or sub-consultants, shall provide HACC with professional services in the following areas:

- Architecture
- Site Planning
- Civil Engineering
- Landscape Architecture
- Structural Engineering
- Electrical Engineering
- Mechanical Engineering
- Envelope Consultant
- IT/Security Consultant
- Construction Administration

C. Experience and Expertise

The successful Design Team, either through in-house or sub-consultants, shall exhibit recent and relevant experience and expertise in the following areas:

- Multi-family, tower rehabilitation including envelope repair and familiarity with the specific construction method.
- Assessment of existing conditions for both the individual building and the surrounding site;
- Working in a team configuration with HACC's Development Team, the Construction Manager/General Contractor, and property management.

- Structural review of the building/construction type.
- Mechanical, plumbing and electrical upgrades for existing systems.
- Developing a scope of work balancing residential/programmatic requests, building system upgrades, sustainability improvements and the development budget.
- Green building and sustainable practices with a focus on improving building and energy performance;
- Experience with completing work on occupied buildings.
- Expert knowledge of current applicable codes, including, and not limited to:
 - Oregon Residential, Structural, Energy, Mechanical and Plumbing Specialty Codes
 - Clackamas County requirements.
- Preparation of necessary design and construction documentation to facilitate the cost estimating by the CM/GC.

D. Anticipated Project Schedule

The current focus for the project is to document the necessary building upgrades sufficient to achieve approval from the HUD RAD program and funding through the anticipated, upcoming 9% LIHTC NOFA application process. The project has been submitted to the HUD RAD program for preliminary approval. Once preliminary approval (CHAP) has been awarded, HACC will have 90 days to complete the RPCA (under separate contract). The information developed by the RPCA consultant will inform the Scope of Work for the Schematic Design package, which will transform the recommended building improvements into actionable items. The schedule for the 9% LIHTC NOFA process is currently unknown. The dates listed below for the 9% LIHTC NOFA process are best guesses, to give framework to the schedule.

- | | |
|---|---|
| • RPCA Consultant selected | January 2, 2018 |
| • A&E contract approved / Design Team starts work | January 18, 2018 |
| • CM/GC selection process | January 11 – February 9, 2018 |
| • Draft of the RPCA available for Design Team | early February, 2018 |
| • LIHTC NOFA issued | February 1, 2018 (anticipated) |
| • Scope of Work / Schematic Design Phase due | end Feb, 2018 (8 wks prior to NOFA due) |
| • Construction Price due | end March, 2018 (4 wks prior to NOFA due) |
| • HUD RAD due diligence due | mid-March, 2018 (anticipated) |
| • LIHTC application Due | April 1, 2018 (anticipated) |
| • LIHTC application awarded – Design Development phase begins | mid August, 2018 (tbd) |

E. Specific Services Requested

HACC is looking for professional services from qualified architectural, engineering and related services consultants to identify and design necessary building repairs and upgrades for Hillside Manor. During the Scope of Work / Schematic Design Phase of the project these services will be provided in collaboration with the Owner's consultants, specifically the RPCA consultant.

When performing work under the Contract, the selected Consultant(s) must meet the highest standards prevalent in the industry most closely related to the services described below. Typical services include, but are not limited to:

1. Scope of Work / Schematic Design Phase

The Design Team will document existing conditions and, working in collaboration with the RPCA consultant, develop a Scope of Work that fits within the anticipated budget. The Schematic Design package will illustrate the agreed upon Scope of Work and will be sufficient to satisfy the LIHTC NOFA application.

- Advise HACC of laboratory or field tests, inspections or investigations, which the Design Team recommends for proper planning and design of the project. HACC will procure the agreed upon tests, inspections and investigations.

- Prepare existing site plan, building plans, sections and elevations. (HACC has copies of the original Construction Drawings used to construct the building. The selected Design Team will need to analyze these documents and review recent upgrades with Property Management when preparing the set of existing drawings.)
- In collaboration with the RPCA consultant, analyze building systems and components (including structure, mechanical, plumbing and electrical systems), making recommendations for repair or replacement.
- Participate in (2) resident meetings to obtain feedback on building upgrades that might improve the safety, longevity or usefulness of the building.
- Working with the Development Team, develop a feasible Project Budget.
- Review all test, inspection and investigation reports; make recommendations based on findings.
- Identify strategies for envelope repair.
- Develop a Scope of Work that includes recommendations from reports, resident meetings and Development Team Meetings.
- Prepare a Schematic Design Package, illustrating Scope of Work recommendations. Package to include drawings and outline specifications.
- Participate in selection of CM/GC.
- Review Schematic Design cost estimate as prepared by CM/GC. Identify potential scope or specification revisions to bring project in budget.
- Code and regulation analysis.
- Participate in regular Development Team Meetings.

2. Design Development Phase

It is expected that there will be a break during the Schematic Design and Design Development phases. The Design Development phase will commence only upon approval from the HUD RAD program and the LIHTC NOFA process. The Design Development scope of work will include but is not limited to;

- Recommend revisions to the Schematic Design package to align with the project's updated cost projections (if necessary).
- Prepare drawings and specifications appropriate to a standard Design Development package for a renovation project. This package will be used to update construction pricing.
- Participate, as needed, in updating cost estimate with CM/GC. Review cost estimate and identify potential value engineering suggestions to bring project in budget.
- Provide preliminary recommendations for construction phasing. Participate in meetings regarding resident relocation efforts.
- Participate in regular Development Team Meetings.

3. Construction and Contract Documents Phase

After written approval from HACC of the Design Development Documents, the Design Team shall prepare Construction and Contract Documents. The Design Development scope of work will include but is not limited to;

- Prepare Construction Drawings, General Conditions and Technical Specifications appropriate for permit submittal and construction.
- Submit project for permit. Track and respond to questions from plans examiners as appropriate.
- Submit project to CM/GC for bidding purposes in format as requested. Respond to questions and substitution requests by potential sub-contractors. Issue Addenda as necessary.
- Participate in pre-bid construction conference, to be led by CM/GC.
- Along with Owner and CM/GC, participate in Bid Presentation. Depending on final bid, identify value-engineering opportunities to bring project in budget.
- Participate in regular Development Team Meetings.

4. Construction Administration and Post Completion and Warranty Phase

Upon Owner's issuance of 'Notice to Proceed' to the CM/GC, The Design Team will participate in typical Construction Administration activities including but not limited to:

- Review product submittals and shop drawings for conformance with the Construction Documents.
- Respond to RFI's as issued by the CM/GC.
- Review Cost Change Proposals and Change Orders as issued by the CM/GC.
- Assist with scheduling any special inspections that might be required by the Construction Documents.
- Participate in regular OAC Meetings to review construction status, resolve coordination issues and identify resident coordination needs.
- Review construction schedules and monitor construction quality for conformance with Construction Documents.
- As construction phases are complete, conduct review process of completed work and issue punchlist. Coordinate with Owner and CM/GC to ensure punchlist items are complete.
- Issue Substantial Completion and Certificate of Completion as appropriate.
- Review Owner's Manual and Warranties for conformance with Construction Documents.

5. Post Completion and Warranty Phase

After execution of the Certificate of Completion, the Design Team shall consult with and make recommendations to HACC during the warranties period and perform inspections as scheduled after construction is complete. The Design Team may be asked to work with HACC to prepare a capital replacement plan, including design and specifications for future replacements and improvements to the property.

III. SUBMISSION REQUIREMENTS

A. Minimum Requirements

To be qualified to respond, firms must possess at least five (5) years of recent and relevant experience.

In addition, respondents must not be debarred, suspended, or otherwise ineligible to contract with HACC, and must **not** be included on the General Services Administration's "List of Parties Excluded From Federal Procurement and Non-Procurement Programs" or the Department of Housing and Urban Development's "Limited Denial of Participation" list.

In addition, respondents must have current and active registration in the State of Oregon Business Registry. Firms must be licensed (if required by law) based on professional discipline.

B. General

Brevity is strongly encouraged. Respond only to items listed below and include only relevant information. The reviewers will not consider materials that are not requested below.

Once submitted, no additions, deletions, or substitutions may be made to written proposals.

C. Submission Requirements

To be considered responsive and responsible, each respondent shall respond to the following requirements. Responses must be specific and complete unto themselves. Any submittal that, in the opinion of HACC, does not fully and completely address these requirements will not be reviewed. **Limit your proposal to the equivalent of (25) single-sided pages. Page limit does not include cover letter and/or required attachments.**

1. Cover Letter

Limit letter to a maximum of two (2) pages. Introduce your firm and describe your general philosophy and relevant experience for the contemplated work.

2. Lead Firm and Consultant Team Description

- a. Discuss the Lead Firm's history, size and organizational structure. Include names of all persons with ownership interest in the company and their titles/roles.
- b. Provide resumes of key personnel for the Architectural Team. Include title and relevant project experience. Identify the Project Manager for the Architectural Team.
- c. Describe the Consultant Team members by discipline including role on the Design Team. Identify staff who would be working on this project and their relevant project experience.

3. Similar Project Experience

Describe the Lead Firm's recent and relevant project experience on a minimum of three projects (at least one should be with a housing authority or public agency) that describe your firm's experience with the following aspects:

- a. Your firm's experience on aspects as described in Section II Part C – Experience and Expertise.
- b. Your firm's experience working with housing authorities and HUD, especially those that are a part of the RAD program.
- c. Your firm's experience working with projects funded with Low Income Housing Tax Credits and other public sources of funding.
- d. Identify Consultant Team members who participated in each project.

4. Fee Proposal

Include a fee proposal for the Scope of Work / Schematic Design Phase of work as described in Section II Part E – Specific Services Requested. (The fee proposal requested as a part of this RFP is for this first phase only. Please note: It is expected that, at the time of Contract Negotiation, the Design Team will establish a not-to-exceed fee for Phases 2 – 5, as described in the Specific Services Requested section.)

Include hourly rates for all staff, including the Consultant Team under contract resulting from this RFP. The fee schedule shall include all administrative costs and reimbursable markup. Subsequent phases will be negotiated, upon project approval, based on the hourly rates submitted.

5. References

Provide (3) references, previous and/or current. At least one reference shall be a housing authority or public agency. References shall include the following information:

- a. Name, title, mailing address and current phone number of contact.
- b. Description of services provided and date the project was completed.

6. Required Forms

The following forms must be fully completed and signed by the appropriate person and included in the qualifications package:

- a. Lobbying Certificate (Exhibit A)
- b. Debarment Certificate (Exhibit B)
- b. Form HUD 5369-B: Instructions to Offerors Non-Construction (Exhibit C)
- c. Form HUD 5369-C: Certifications & Representations of Offerors – Non-Construction Contract (Exhibit D)
- d. Form HUD 5370-C: General Conditions for Non-Construction Contracts (Exhibit E)

8. Format Requirements

Submittals will only be received by the RFP Contact via email. Please consider this format when assembling the submittal:

- a. An 8.5" X 11" format, either vertical or horizontal; and
- b. A font size no smaller than 10 points.

IV. EVALUATION

A. Method of Award

HACC will appoint a Selection Committee to evaluate the Proposals. The Committee will evaluate written responses to the RFP and shall apply the evaluation criteria and scoring set forth below. The Committee will rank the submittals from highest to lowest. If there are two or three firms with a similar ranking, HACC reserves the right to conduct interviews with the selected Design Teams. Thursday, December 21, 2017 has been set aside as a potential day to interview Design Teams. HACC will notify the appropriate teams regarding selection and/or interviews as quickly as possible. Once a selection has been made, HACC will then open negotiations with the top-ranked firm. The Committee will make its recommendation for contract award to the firm(s) determined to be the most highly qualified based on the ranking.

HACC anticipates executing a contract for Phase 1 of the Specific Services Requested as outlined in Section II Part E. If the project is approved by HUD and receives appropriate funding through the LIHTC NOFA application process, HACC will extend the contract through a 'Task Order,' which will be based on the hourly rates and the NTE fee identified in the original contract. HACC will select the Design Team for the entire project.

B. Site Visit

While the site visit is not mandatory, it is highly recommended that firms intending to submit a proposal to this RFP attend the meeting as scheduled.

C. Evaluation Criteria

Submission Requirement	Points
Consultant Firm (Strength & Experience of Team Assigned)	30
Relevant Project Experience	40
Cost	15
References	10
MBE/WBE/DBE Firm	5
Total	100

D. Questions and Comments

Any respondent requiring clarification of the information must submit specific questions or comments to the RFP contact via email. **The deadline for submitting such questions is 12:00 Noon, Monday, December 11, 2017.** If in HACC's opinion, additional information or interpretation is necessary; such information will be supplied in the form of an Addendum that will be posted to the HACC website:

<http://www.clackamas.us/housingauthority/bids.html>

Such addenda shall have the same binding effect as though contained in the main body of the Request for Proposals. Oral instructions given to prospective respondents by HACC employees or its agents shall not bind HACC. All Addenda shall be issued by HACC not less than three (3) calendar days prior to the qualifications deadline.

V. CLARIFICATIONS AND ADDENDA

A. Minority Business (MBE) Goals

The firm submitting a proposal shall be aware of the HACC goals of consistency with Presidential Executive Orders 11625, 12138 and 12432 and Section 3 of the HUD Act of 1968. The HACC goal is to make efforts to ensure that small and minority-owned business, women's business enterprises, labor surplus area business, and individuals or firms located in or owned in substantial part by persons residing in the area of a HACC project are used when possible.

B. Award of Contract; Clarification or Rejection of Proposals

HACC will evaluate proposals and will rate proposals using the scoring methodology described in Section IV of this document.

HACC reserves the right to seek clarification of the written Proposals from respondents.

HACC reserves the right to reject any and all proposals and to waive any informality in proposals received whenever such rejection or waiver is in the interest of the Housing Authority.

HACC reserves the right to reject the proposal of any proposer including those who have previously failed to perform properly, or to complete on time, contracts of a similar nature; who is not in a position to perform the contract, or who has neglected the payment of bills or otherwise disregarded their obligations to subcontractors, material suppliers, or employees. HACC also reserves the right to reject the proposal of any proposer listed in the current issue of "List of Parties Excluded from Federal Procurement and Non-procurement Programs" U.S. General Services Administration, Office of Acquisition Policy or listed in the HUD Limited Denial of Participation, current edition.

Professional services contracts will not have terms exceeding five years without HUD Approval.

The successful firm shall sign and file with HACC all documents necessary to the successful execution of the contract within ten calendar days after the notice of award.

C. Right to Protest

Any actual proposer who is adversely affected or aggrieved by HACC's award of the contract to another proposer on the same solicitation shall have fourteen (14) calendar days after notice of intent to award has been issued to submit to the Executive Director a written protest of the award. The written protest shall specify the grounds upon which the protest is based. A protest must meet the requirements of ORS 279B.410. HACC will not entertain protests submitted after the time period established in this rule.

D. Insurance Requirements

Prior to executing a contract, the consultant team shall provide the following documents:

1. Proof of \$1,000,000 per occurrence (\$2,000,000 general aggregate) general liability insurance,
2. Proof of \$1,000,000 automobile liability insurance,
3. Proof of \$1,000,000 combined single limit per occurrence (\$2,000,000 general annual aggregate) professional errors and omissions liability insurance,
4. Proof of \$1,000,000 employers liability insurance,
5. Proof of Worker's Compensation insurance, and

All required insurance other than Professional Liability, Worker's Compensation, and Personal Automobile Liability shall include the "Housing Authority of Clackamas County, its agents, officers, and employees" as an additional insured.

E. Cancellation

HACC reserves the right to cancel or reject any or all Proposals, and to cancel award of this contract at any time before execution of the contract by both parties if cancellation is deemed to be in HACC's best interest. In no event shall HACC have any liability for cancellation of award.

F. Cost of Preparation

Costs incurred by respondents in preparation of a response to this RFP shall be borne by the respondents.

G. References

HACC reserves the right to investigate references including other than those listed in the response to this RFP. Investigation may include past performance of any consultant team member with respect to its successful performance of similar projects, compliance with specifications and contractual obligations, completion or delivery of a project on schedule or on budget, and its lawful payment of subcontractors, employees, and workers. If demanded by HACC, supportive references must be furnished.

H. Confidentiality

Proposals are public records. All information submitted by respondents shall be public record and subject to disclosure pursuant to the Oregon Public Records Act, except such portions of the Proposal for which respondent requests exception from disclosure consistent with Oregon Law. All requests shall be in writing, noting specifically which portion of the proposal the respondent requests exception from disclosure. Respondents shall not copyright, or cause to be copyrighted, any portion of any said document submitted to the HACC as a result of this RFP.

VI. EXHIBITS

- A. Lobbying Certificate
- B. Debarment Certificate
- C. Form HUD 5369-B: Instructions to Offerors Non-Construction
- D. Form HUD 5369-C: Certifications and Representations of Offerors – Non-Construction Contract
- E. Form HUD 5370-C: General Conditions for Non-Construction Contracts
- F. Professional Services Contract Template
- G. Floor Plan Diagrams
- H. Physical Needs Assessment and Energy Audit by EMG dated 12/28/2015

- END -