



**JHC-2020-2**  
**Request for Proposals**

**RAD Physical Needs Assessment & Energy Audit**

**Issue Date: June 29, 2020**

Jackson Housing Commission

301 Steward Avenue

Jackson, MI 49201

Office (517) 787-9241      Fax (517) 787-6143

**Jackson Housing Commission**

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## Part I. Solicitation Information

### A. *Description of Services*

Jackson Housing Commission (JHC) is a municipal agency created under the laws of the State of Michigan. Its mission is to provide decent, safe, and sanitary housing for low-income families. (JHC) receives funding from the U.S. Department of Housing and Urban Development (HUD) for the operation and modernization of low-income public housing owned by the Housing Authority.

HUD regulations require public housing authorities (PHA) to undertake a Physical Needs Assessment (PNA) and an Energy Audit (EA) once every 5 years. These Assessments are to be performed using HUD's PNA tool software, also known as the "PNA tool." The software and user guide are currently available from the HUD Capital Fund web page:

[http://portal.hud.gov/hudportal/HUD?src=/program\\_offices/public\\_indian\\_housing/programs/ph/capfund/gpnatool](http://portal.hud.gov/hudportal/HUD?src=/program_offices/public_indian_housing/programs/ph/capfund/gpnatool).

JHC expects that the PNA will provide an evaluation of the remaining useful life of major systems, livability, street and landscape improvements, and other property features; and provide recommendations for improvement by property, in order of priority by phase as detailed in the Scope of Services.

**PNA** - This RFP requires that the selected Contractor follow the PNA protocol, use the PNA tool in the conduct of the PNA, prepare the data for submission to HUD by generation of the XML file in the tool and subsequent email of same to PNADATA@hud.gov, and provide the Housing Authority with a written report and the completed PNA tool. During setup of the tool, the selected Contractor must work with the PHA to request and receive the PIC data import necessary to begin using the PNA tool. As discussed later in this RFP - Deliverables and Timeframe, the Contractor will be required to assist the Housing Authority in successfully submitting the data to HUD.

**EA** - HUD does not provide software for conducting the EA. Instead, the EA must be performed in a format of the Contractor's choosing, in accordance with the requirements listed at 24 CFR Part 965.302. This RFP requires a ASHRAE Level II audit (American Society of Heating, Refrigerating and Air-Conditioning Engineers – evaluation of the building **energy systems** in detail to define a variety of potential **energy-efficiency** improvements. In addition to the HUD requirements, this RFP requests a benchmark of utility costs at a property against the average of the costs in the City of Jackson (see 3.2.2)

The results of the EA should be loaded into and included in the PNA in accordance with the HUD PNA user guide.

**RAD PCA** (Rental Assistance Demonstration Physical Conditions Assessment) – The Results from the PNA and EA should be transferred to the RAD PCA. Details regarding the RAD PCA are available online at <http://portal.hud.gov/huddoc/RADPCAExcelTool.xlsx>

Upon completion of the PNA, JHC may then upload the PNA to HUD using the data contained in the HUD PNA software.

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JHC is seeking a professional consultant to undertake and complete the following according to HUD requirements and protocols, and including any supplemental services the PHA may request herein:

- Combined (PNA and EA)
- RPCA.

***B. Important Due Dates/ Locations/ Time***

Schedule	
Event	Date
<b>RFP Publication</b>	<b>June 29, 2020 at 12:00PM EST</b>
<b>RFP Published Locations</b>	<b>1. Housing Agency Marketplace- ha.internationalprocurement.com 2. Public Housing Agency Director Association- phada.org 3. JacksonHousing-MI.org</b>
<b>Pre-Proposal Conference</b>	<b>None</b>
<b>Questions Due</b>	<b>July 17, 2020 at 12:00PM, EST</b>
<b>Proposals Submittal Deadline</b>	<b>July 31, 2020 at 4:00PM, EST</b>

All questions concerning this RFP must be submitted in writing no later than July 17, 2020 at 12:00 p.m. EST . All questions must be submitted through Housing Agency Marketplace- ha.internationalprocurement.com.

Once the question period has ended, all responses to questions will be posted as an addendum on Housing Agency Marketplace- ha.internationalprocurement.com. All Addenda's must be acknowledged with a signature and timely submitted as part of this solicitation. Proposals may be rejected if the addendum is not timely submitted as stated.

***C. Preparation of Submission:***

**Electronic Submission:** Submit electronically via email a PDF file containing the entire proposal. Table of contents indexed and text recognition (OCR) active with the entire file searchable and indexed. The proposal should be uploaded to Housing Agency Marketplace - ha.internationalprocurement.com.

The Cover of the proposal should have the following information:

Company Name  
Company Address  
RFP/ Solicitation Number and Name  
Date and time Proposal are due

**Caution: Late Proposal submission will be handled in accordance with the provisions contained in HUD Form HUD 5369-B Titled “LATE SUBMISSIONS, MODIFICATIONS, AND WITHDRAWALS OF OFFERS”.**

## **Part II. Reservation of Rights**

1. JHC reserves the right to reject any or all bids/proposals to waive informalities in the bidding/proposal process, and to terminate the bidding process at any time, if deemed to be in the best interest of the JHC.
2. The JHC reserves the right to terminate any contract awarded pursuant to this bid/RFP process, at any time for the convenience of the JHC upon five (5) days written notice to the successful bidder/responder.
3. The JHC reserves the right to determine the days, hours and locations that the successful bidder/responder shall provide the services detailed by this bid/RFP process.
4. The JHC reserves the right to hold all bids/proposals without award and not permit withdrawal of said bids/proposals for a period of sixty (60) days from the bid/ proposal opening date.
5. The JHC reserves the right to negotiate the proposed bid/proposal prices with the three (3) lowest, most responsible bidders/responders.
6. The JHC reserves the right to issue multiple contracts as a result of this offering.
7. The JHC reserves the right to reject any bid or proposal that it deems to be non-responsive or the bid/proposal from any bidder/response deemed to be non-responsible.
8. The JHC shall not be under any obligation to compensate any bidder/responder for any cost incurred in responding to this bid/RFP document.

## Part III. Contract Conditions

Upon completion of the Proposal Evaluation Process, the JHC evaluation panel will forward its conclusions and recommendation to the JHC Executive Director. The Executive Director will submit the panel's conclusion and recommendation for approval of award, if required by the JHC Procurement Policy, to the JHC Board of the Commissioners at a regularly scheduled or special Board meeting. If the recommendation is approved, the successful firm will receive a Notice of Award.

The following provisions are required in all contracts issued by the Jackson Housing Commission

**a. Assignment of Personnel:**

The JHC retains the rights to demand replacement or renewal of any personnel assigned to this project if the JHC believes that such a change would be in the best interest of the JHC and the successful completion of the contracted work.

**b. Contract Period**

The term of this contract is One Year with 4 one-year option periods.

**c. Contract Service Standards**

All work performed pursuant to this "Request for Proposal" or any subsequent Contact shall conform and comply with all applicable local, state and federal laws and regulations. The Contractor will be paid upon completion of the contract and satisfaction of all contract and deliverable requirements contain in Section V of this RFP.

**d. Non-Discrimination Clause**

A contract for work under this RFP will obligate the Contractor not to discriminate in employment practices. JHC encourages minority owned businesses to participate.

### **Bill/ Payment**

The CPA shall submit an invoice to the JHC for work completed. The CPA shall include his or her Company Name, address, and telephone number; an invoice number referencing this Contract, and the detailed itemized statement of services provided. The JHC shall pay all invoices net thirty (30) days.

## Part IV. Index of Documents

The INDEX OF DOCUMENTS shown below is provided to assist all Offerors in correctly preparing and submitting a responsive RFP to JHC in accordance with the requirements of the above RFP. The Index contains a listing of all documents and those that are required submittal items.

Please review this index and submit all documents that are checked “**REQUIRED SUBMITTAL**” with your proposal. Documents that are checked “**SIGNATURE REQUIRED**” must be properly executed. Documents that are checked “**NOTARY/CORPORATE SEAL REQUIRED**” must be notarized and/or have the Bidder’s corporate seal affixed.

DOCUMENT	REQUIRED SUBMITTAL	SIGNATURE REQUIRED	NOTARY /CORPORATE SEAL REQUIRED	FOR YOUR REVIEW
Documents as outline in Part V. Submission Requirements	X	X		
<b>Acknowledgements, Certifications and Required Documents as listed below:</b>				
<i>Cost Proposal Sheet- <b>Attached</b></i>	X			
<i>HUD FORM (HUD-5369-B)</i> <i>Instructions to Offerors- Non-Construction- <b>JHC Website</b></i>				X
<i>HUD 5369-C Certifications and Representations of Offers- Non-Construction- <b>JHC Website</b></i>	X			
<i>HUD 5370 C- HUD General Conditions-Non-Construction Section I and II- <b>JHC Website</b></i>				X
<i>Section 3 Compliance- <b>JHC Website</b></i>	X	X		
<i>Bidders Statement- <b>JHC Website</b></i>	X	X		
<i>Reference and past performance form- <b>Attached</b></i>	X			
<i>Acknowledgement of addenda form- <b>Attached</b></i>	X	X		

## Part V. Scope of Services

### 1. General Overview

**1.1.** JHC hereby requests proposals from qualified firms and individuals to perform both a PNA and an EA in accordance with all current HUD regulations, the HUD PNA software (“tool”), forms, user guide, and other guidance as may be issued HUD from time to time.

**1.2.** The PNA and the EA may reflect up to 533 units in 3 projects from the JHC portfolio as identified in Appendix 1 of this RFP. The projects in Appendix 1 that are the subject of the PNA, and EA are to include both dwelling and non-dwelling spaces and buildings as well as roads and parking areas contained within each project.

**1.3.** Appendix 1 contains a list of all properties, by project, with date of construction, total number of units, and (separately) number of public housing Annual Contributions Contract (ACC) units, and including a listing of other community facilities to be included in the assessment. JHC has three properties for a total of 533 units. JHC projects at this time, that REED Manor will be demolished and newly developed and therefore may not require a RAD PCA. As we move further along in the RAD process, this assumption may change. Therefore, Chalet Terrace and Shahan will follow a similar Task/Deliverable timeline and Reed Manor either not have a RD PCA performed or will have a RAD PCA timeline that is separate from the two other properties.

**1.4.** Appendix 1 also identifies, if applicable, any mixed-finance properties that contain public housing ACC units that are to be included in the PNA.

**1.5.** The results of the PNA and EA will provide JHC with data to make both long- and short-term strategic decisions on its physical inventory and assist in obtaining financing.

### 2. Physical Needs Assessment (PNA) Scope of Work/Technical Specifications

JHC is seeking proposals from qualified and licensed entities to provide the following detailed services:

**2.1. General Requirements:** *In accordance with the PNA User Guide, and the Public Housing and Modernization Standards Handbook 7485.2.* The Energy Audit and PNA will be conducted in accordance with 24 CFR 905.300, 24 CFR Part 965.302, and energy codes. The selected Contractor will provide a full range of services including evaluating the existing conditions of the housing stock based upon a representative sample selection of buildings, units, common areas, and other JHC physical facilities. The assessment will identify energy conservation measures and the cost-savings that result from implementing the measures, thereby reducing operating costs. All identified physical improvements will meet or exceed HUD mandatory standards, and those established by local and state health, safety, and building codes. At a minimum, the goal of the PNA is to identify and provide a description of all physical improvements that will be required to bring the property back to a level comparable with “as-built,” to the degree reasonably possible based on available components and building age. The effort should provide the JHC with the information necessary to ensure long-term physical viability and in a manner suitable for planning and budgeting purposes. Data shall be in a format suitable for HUD reporting requirements.

**2.1.1.** Generally, identify deficient conditions, such as those that result from deferred maintenance, and building and life safety code noncompliance or obsolescence issues.

**2.1.2.** Perform interviews and review existing property documentation with knowledgeable JHC staff, including building plans, building histories, prior assessments and energy audits, maintenance records, and Real Estate Assessment Center (REAC) scores of each development.

**2.1.3.** Identify all development components that will be part of the assessment.

**2.1.4.** Establish a methodology that will sample multiple like-kind buildings, and common areas such as lobbies, corridors, and community facilities.

**2.1.5.** Establish a plan to inspect the following:

- 25 percent of apartment interiors.
- 10 percent of scattered site units.
- 100 percent of common areas.

The HUD PNA tool provides a general list of potential components to be assessed. Generally, components to be assessed are those for which replacement represents a significant capital cost eligible for funding from the HUD Capital Fund grant received by the PHA. The HUD list is not all inclusive and may not include significant components that will need assessment.

**2.1.6.** Perform walkthrough assessment/inspections of each development and other JHC properties to ascertain the condition of the property; **immediate** critical and non-critical needs; general code compliance; expected repair, replacement, and major refurbishment needs; and total estimated cost to complete such items. The assessor will record the data on the HUD PNA approved data collection forms for the following: site, building exterior, building systems, unit, and common areas.

**2.1.7.** Identify work necessary to comply with federal, state, and local requirements and codes, such as elimination of asbestos/lead and new energy code compliance.

**2.1.8.** The assessor will provide and record an estimate of Expected Useful Life (EUL) for each individual component and will provide a source for EUL in general.

**2.1.9.** The assessor will provide and record a replacement unit cost for each individual component and for a total of those components. (E.g., per window and per window times all similar windows.)

**2.1.10.** Identify work items needed and costs for implementation to make selected units accessible and usable by the handicapped as required by Section 504 of the Rehabilitation Act of 1973. This will include costs to retrofit a specific number of dwelling units to meet Section 504 requirements for persons with disabilities. Each area that is designated as part of Section 504 or Americans with Disabilities Act (ADA) requirements will be inspected to ensure that the components are functioning according to their purpose. (*Note: A regulatory compliance review is not required for these units or areas; only a functionality and EUL assessment is needed.*)

**2.1.11.** Identify energy conservation measures and review energy audit reports to incorporate energy audit recommendations into the PNA. Evaluate options for increased energy efficiency.

**2.1.12.** The intent of the assessment is to perform a full evaluation based on visual observation of accessible areas. The assessor is not expected to perform destructive or forensic testing (opening wall cavities, cutting pipes, etc.) or to enter confined spaces. No destructive testing is to take place without prior written approval of the housing authority.

**2.1.13.** Any deficiencies identified that could have an impact on health and safety will be brought to the attention of JHC immediately by written and verbal notification as a matter of ensuring the safety of residents and housing authority personnel.

**2.1.14.** The selected Contractor will develop a Comprehensive Costing Library. Professional/certified cost estimating utilizing “R.S. Means” construction costing is preferred. Building a comprehensive cost and EUL component library is vital to using the HUD PNA Tool. The comprehensive cost and EUL component library must contain descriptions and reference information.

**2.1.15.** Provide a detailed report for the JHC developments that details the assessment data. The selected Contractor will detail quantity and cost estimates to accomplish each work item, a total for each project, and a grand total to accomplish all needed physical improvements. *General work category (e.g., Kitchens, Bedrooms) costing without specific work item costing is unacceptable.* Provide individual cost tables and digital photographs to document notable conditions at each property. The Contractor shall show a line-item prioritization. The work shall include a review of any prior plans, recommendations, and a detailed report on items completed in the interim. The major part of the work consists of a thorough assessment of noted property, leading to a prioritized list of recommended improvements, plus a detailed physical database. Included is the identification of work that may be recommended to improve long-term viability, such as change in physical configurations, comprehensive revitalization with total demolition, and/or disposition. All data will be entered into the HUD PNA tool, sufficient to produce a 20-year cost projection of needs for each capital component.

**2.1.16.** The PNA will require the use of a HUD tool that can be found at the following HUD website address:  
[http://portal.hud.gov/hudportal/HUD?src=/program\\_offices/public\\_indian\\_housing/programs/ph\\_capfund/gpnatool](http://portal.hud.gov/hudportal/HUD?src=/program_offices/public_indian_housing/programs/ph_capfund/gpnatool).

The work performed by the Contractor under this solicitation must be in compliance with the proposed regulations as known at the time of this solicitation. Contractors shall ensure that data collected under this solicitation include all information required under the proposed rule and are sufficient to enter into the PNA tool. The Contractor shall include in its price all costs to complete the HUD PNA tool, as required. This rule revises HUD’s energy audit requirements applicable to the Public Housing program for the purpose of clarifying such requirements, as well as identifying energy-efficient measures that need to be addressed in the audit and procedures for improved coordination with physical needs assessments.

**2.2. Phases of Work:** Work shall consist of three phases:

**2.2.1. Pre-Assessment**—focuses primarily on preparing for the assessment, as well as collecting and recording development data and utilizing architectural plan measurements and count data.

**2.2.2. Assessment**—focuses on helping you to identify all building components, including quantities of each present component; establish remaining useful life (RUL); and determine eligibility and cost of component refurbishment or replacement.

**2.2.3. Post-Assessment**—focuses on establishing industry-standard parallels through collection, review, data input, and report production.

**2.3. Steps of Work:** The steps involved include, but are not limited to:

**2.3.1.** Develop a detailed survey scope and survey methodology, pertinent to the collection of all assessment data and the information required to develop the database.

**2.3.2.** Survey existing physical conditions at the development, including but not limited to: the roofs, envelopes, windows, landscaping, streets/parking areas, sidewalks, etc.; the building interiors, including all finishes, fixtures, materials, and equipment; all common areas, including halls, lobbies, stairwells, etc.; crawl spaces, utility tunnels, etc.; and all mechanical, electrical, plumbing, and air conditioning systems, etc.

**2.3.3.** Interview resident representatives and maintenance and management staff; collect and record all relevant data.

**2.3.4.** Based on information gathered in the steps above, analyze the condition of all systems and components at the development and identify all capital improvements or modernization necessary.

**2.3.5.** Provide cost estimates for each item of recommended improvement, including units and unit prices where applicable.

**2.3.6.** Employ quantitative units in building the database wherever possible.

**2.3.7.** Review the JHCs most recently available PNA to verify which items were completed and which items remain to be completed.

**2.3.8.** Prioritize each work item. There should be at least five (5) categories of priority, ranging from emergency, through urgent, to long-range.

**2.3.9.** To allow for future updates and modifications by the housing authority, the Contractor shall provide the entire plan in an electronic database format to facilitate the future updating of the facilities condition evaluations.

**2.4. PNA Report:** Upon completion of the inspections, the selected Contractor will provide a report to the JHC in narrative and spreadsheet forms that meets the JHC requirements, in both paper and

electronic format. This requirement also includes the XML report to be generated from the PNA tool for submission to HUD. The draft report will contain the PNA results, including ECMs from energy audits, and will be submitted to JHC for review and comments.

The report of the PNA shall include:

**2.4.1.** An introductory background section, summarizing the prior PNA and history; the past capital improvements; the assessment procedures, assumptions, and methods; the prioritizing system and approach; the cost-estimating methods and assumptions; and an explanation of and reference to the cost-estimating guide proposed.

**2.4.2.** A separate HUD Form 52828, Physical Needs Assessment, for each asset management property/development assessed. Attach to each report color photographs and a detailed narrative describing the property's exterior and interior physical elements and condition, including architectural and structural components and mechanical systems. Include a section for the development that gives general information and descriptions of the development.

**2.4.3.** A listing of each issue of deficiency, by priority, giving at a minimum the system (HVAC, site, unit interior, etc.), a brief description of the problem, a brief recommendation, and a cost estimate.

**2.4.4.** An attachment that includes an overall listing of the recommended work items by priority, a copy of the survey form, and a listing of all the systems, components and subcomponents, and entry codes used in the database.

**2.4.5.** An Executive Summary summarizing major findings and recommendations plus any other major issues, including any repair items that immediately impact health and safety such as code violations; regulatory compliance issues such as relocation planning, asbestos-containing materials, lead-based paint, and environmental issues; or systematic problems. Also describe any Section 504 work items, energy conservation measures, and any environmental hazard (asbestos/lead-based paint) items.

### **3. Energy Audit Scope of Work/Technical Specifications**

Pursuant to 24 CFR 965.302, JHC is required to complete an energy audit for each JHC-owned project under management not less than once every 5 years.

**3.1. General Requirements:** The Energy Audit will be conducted in accordance with 24 CFR Part 965 and energy codes. The selected Contractor will provide a full range of services including evaluating the existing conditions of the housing stock on the basis of a physical inspection of a representative sample. (Note: The Contractor will be expected to inspect a sample size comparable to that for the PNA described above; the inspected areas for purposes of the energy audit may be, but are not required to be, the same as those inspected for the PNA.) The assessment will identify water and energy conservation measures and the cost-savings that result from implementing the measures. All identified physical improvements will meet or exceed HUD mandatory standards and those established by local and state health, safety, and building codes. The Contractor shall enter the data

into the PNA tool for each ECM considered sufficient to include the ECM as an alternate item on the cost projection and to calculate a simple payback for each considered ECM. Data fields required for each ECM are the general specification of the ECM, its cost, its estimated useful life, its estimated annual water/energy consumption, the utility rate applicable to the ECM, and the water/energy consumption of the component to be replaced by the ECM if applicable.

**3.2. Scope of Services:** Pursuant to 24 CFR 965.302, the JHC is required not less than once every 5 years to conduct an energy audit. Specifically, the noted CFR states that each PHA:

“shall complete an energy audit for each PHA-owned project under management, not less than once every five years. Standards for energy audits shall be equivalent to State standards for energy audits. Energy audits shall analyze all of the energy conservation measures, and the payback period for these measures, that are pertinent to the type of buildings and equipment operated by the PHA.”

The Contractor shall perform an energy audit comparable to the standard established by the American Society of Heating, Refrigerating, and Air-Conditioning Engineers (ASHRAE) Level II.

**3.2.1.** The objectives of the audits are to identify energy conservation measures (ECMs), to determine costs to implement each ECM, and to calculate the cost-savings that result from implementing the measures. Additionally, the audit should identify any compliance, health, or safety issues related to energy improvements. Each development will require conduct of a non-investment-grade energy audit and a report. HUD has published a proposed energy audit rule in the Federal Register (Public Housing Energy Audits, dated 11/17/2011) that provides standards that the Contractor shall use in the conduct of the energy audit. The Contractor shall also comply with The Public Housing Modernization Standards Handbook, 7485.2 REV-1, dated February 4, 1985, and with the [HUD Energy Conservation for Housing—A Workbook](#), January 1998.

**3.2.2** The Energy Audit will include a benchmark of the current average utility costs of a property against the Jackson area average utility costs.

**3.3.** The selected Contractor shall conduct an energy audit for each measure. The following items are specifically included:

**3.3.1.** The Contractor shall analyze the utility bills (list utilities used by the PHA) provided by the PHA for the three (3) most recent years for all common areas (PHA paid) and units (to the extent available). The analysis shall identify trends of consumption against a benchmark(s) to support the Contractor’s prioritization recommendations for actions such as implementing ECMS, maintenance activities, and/or resident education.

**3.3.2.** The energy walkthrough survey must include Core ECMS, which have a proven track record at reducing energy and water consumption. The Core ECMS include items related to building envelopes (e.g., insulation); heating, cooling, and other mechanical systems; water conservation; power, lighting systems, and controls (e.g., CFL); and appliances (e.g., ENERGY STAR).

**3.3.3.** Review of all available building plans, specifications, product literature, and test and balance data to quantify building and equipment design criteria, parameters, and sizes. The review should also include architectural, mechanical, and electrical drawings and specifications for housing developments, administrative offices, and other buildings and identify whether any energy conservation measures, or energy-saving equipment is in use.

**3.3.4.** Collection of climatological data for the local area, to correlate energy usage to weather conditions.

**3.3.5.** Interviews of selected property, maintenance, and modernization personnel and residents to determine problem areas and concerns.

**3.4.** Advanced ECMs, which include advance, experimental, or difficult improvement items such as fuel conversion, conservation technologies (energy management systems), energy-generating technologies, and renewable energy systems (solar, geothermal), may be considered for supplemental feasibility study outside the scope of this contract.

**3.5.** The following tests are not required under the HUD standard and are included here as add options. (Delete paragraphs that do not apply.)

TBD – An Addendum will be issued if additional tests will be required

**3.6. Report Documentation or Report Preparation:** The Contractor shall develop a comprehensive Energy Audit Report for each housing development and submit to JHC. This report shall contain:

**3.6.1.** A summary of energy conservation measures studied and those recommended for implementation, by development.

**3.6.2.** A detailed description of each energy conservation measure, the cost to implement, the estimated annual savings that must result, and the average simple payback.

**3.6.3.** All energy-savings opportunities ranked according to their payback, by Project, starting with the quickest and ending with the longest payback.

**3.6.4.** Recommendations as to the order in which the recommended energy-savings opportunities should be implemented in order to provide JHC with a master plan of action.

**3.6.5.** Presentation of the interrelationships of the various energy conservation measures in a project so that the JHC understands the impact that implementing each measure has upon the other proposed measures.

**3.6.6.** All backup engineering calculations, so that the Energy Audit Report can be readily updated each year to reflect changes in the cost of energy or the cost to implement the energy-savings measures.

#### **4. RAD PCA**

JHC intends to RAD its properties. The results of the PNA and EA should be transferred to the RAD PCA Tool.

#### **5. Deliverables and Timeframe**

**5.1.** The Contractor shall deliver the following, not later than 45 days from the effective date of the contract:

**5.1.1.** A briefing, at a time, date, and place determined by JHC (**estimated date 30 days after contract signing**), reflecting an overview of the Contractor's findings based on the completed PNA and EA. At a minimum, the Contractor shall address the overall condition of each project listed in Appendix 1 and review the HUD PNA report to be submitted to HUD.

**5.1.2.** A full, bound hard copy of the results of the PNA and EA. This includes a separate report prepared for each development that includes a discussion of all building systems, photographs of representative interiors and systems, and a table showing immediate repairs and life-cycle component replacement.

**5.1.3.** A copy of the PNA tool with all of the JHC PIC Data, Inspections, Master Cost Library, Replacement Needs, Refurbishment Needs, Sustainability Needs, Accessibility Needs, and Marketability Needs installed, if necessary.

**5.1.4.** A demonstration of technical assistance to JHC staff regarding submission of the required reports to HUD, including the PNA and future annual updates. The Contractor shall provide no less than 2 hours of training to PHA staff to instruct them in the use of the PNA tool for ongoing management and annual updating.

**5.1.5.** This shall include the preparation of the initial XML submission (generated within the tool) and detailed instructions for how the PHA shall submit it to HUD, in accordance with HUD requirements at the time the submission is due. The Contractor shall also provide instructions or references to the procedure for applying annual updates for submission to HUD.

**5.1.6.** The Contractor will continue to provide JHC staff with technical assistance until they are able to successfully submit the completed PNA file, which must be validated by HUD as a successful submission.

Two (2) hard copies of each aforementioned item shall be submitted, as well as one (1) electronic copy submitted in either MS Excel and/or MS Word format on a "flash" or "thumbnail" drive. In lieu of a flash/thumbnaill drive, the electronic copy can be setup in a dropbox as long as JHC can access the dropbox and download the files – the responsibility of ensuring JHC can retrieve the electronic files in this manner is solely the contractors. These documents/devices shall be the sole property of the JHC. The Contractor shall not provide the documents produced for JHC under this contract to any other party unless approved in writing by the Contracting Officer.

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**5.2.** Time Completion Plan/Schedule (TCP/S): Offerors shall establish in the TCP/S the schedules/milestones shown below for the deliverables identified. In developing the schedule of milestones, the Contractor shall provide for thirty (30) calendar days for the JHC to review, coordinate, and comment on draft deliverables.

Deliverables	Timeframes/Milestones – 90 day completion
Physical Needs Assessment (PNA) – Draft Version	Within thirty (30) days after the effective date of the Notice To Proceed (NTP)
Energy Audit – Draft Version	Within thirty (30) days after the effective date of the NTP
RAD PCA – Draft Version	Within thirty (30) days after the effective date of the NTP
JHC Review with comments back to Contractor	30 days after receipt of the draft
Physical Needs Assessment (PNA) – Final Version	Within thirty (30) days after receipt of comments on the “Draft Version” of the PNA
Energy Audit – Final Version	Within thirty (30) days after receipt of comments on the “Draft Version” of the Energy Audit
RAD PCA – Final Version	Within thirty (30) days after receipt of comments on the “Draft Version” of the RAD PCA Tool

Note: In addition to providing a cost for the PNA and EA, qualified offerors should include the cost for converting the results of the PNA and EA into the required RAD Physical Condition Assessment (PCA), the authority is planning on converting its properties from public housing to the RAD program. The offeror must have qualifications for preparing the RAD PCA, and the offeror should expand on these qualifications and prior experience with PCAs, such as under HUD’s Mark-to-Market Program. Details regarding the RAD PCA are available online at <http://portal.hud.gov/huddoc/RADPCAExcelTool.xlsm>.

**5.3.** All reports are to be sent to:

Jackson Housing Commission (JHC)  
Attention: Laurie Ingram  
301 Steward Avenue # C  
Jackson, MI 49201  
l.ingram@jacksonhousing-mi.org

## **6. Qualifications**

In order to be considered qualified to perform the services under the Scope of Work, contractors performing the PNA/EA must have the following qualifications:

**PNA:**

Five (5) years of experience performing physical property inspections and cost estimations of public housing developments in varied physical condition and age in similar metropolitan area(s);

Demonstrated knowledge of applicable multifamily building standards and codes; energy-efficiency practices; CARSS, and a working knowledge of commonly used computer technology (MS Office, Excel, etc.);

Trained to evaluate building systems, health and safety conditions, and physical and structural conditions; and to provide cost estimates for maintaining, rehabilitating or improving deficiencies. Must also have expertise in environmental analyses and inspections (e.g. asbestos and lead testing).

Demonstrated expertise with report production that are well regarded in the marketplace in terms of content, timeliness, and responsiveness.

Capacity to complete the project inspection and prepare the report in a time frame acceptable to the JHC.

**EA:**

1. Have the following acceptable certifications to include “energy auditor”, “certified energy auditor,” “certified energy manager,” “HERS Rater” issued by a state or national energy auditing certifying agency, such as the American Association of Energy Auditors (AEE), the Building Performance Institute (BPI), and the Residential Energy Services Network (RESNET);
2. The assigned inspector, not just the company, must have personal experience in conducting such audits.

**RAD Conversion to PCA**

Prior experience performing the conversion for PHAs

## Part VI. Submission Requirements

Proposals should be submitted in the following format, with Tabs separating each section:

- 1. Letter of Transmittal.** A transmittal letter signed by the Contractor authorized to submit the proposal and to make commitments on behalf of the company.
- 2. Table of Contents.** A table of contents shall be provided that lists each section of the proposal as required by Part IV of this RFP.
- 3. Organization History.** Give a brief description of the firm and its history.
- 4. Qualifications.** A description of the firm's qualifications to perform the PNA and EA.
- 5. Experience.** Provide a list of the organizations for which the Contractor has performed relevant work, going back at least 5 years. Particular emphasis should be on contracts with public housing agencies and performance of physical needs assessments and energy audits for properties of similar character to those of the subject PHA.
- 6. Staffing.** Provide a list of staff members who will work on this contract, including principals and staff-level personnel, along with qualifications of each.
- 7. Evaluation Criteria.** Provide information addressing each of the evaluation criteria.
- 8. Pricing.** Provide pricing separately for the PNA, the EA, and Total Costs for providing the services covered by this RFP. Show each staff member, hours proposed, and hourly rates (fully loaded). Also show material and other costs, including travel, general, administrative, overhead, and profit.
- 9. References.** Provide a list of clients, including the organization name, contact person, telephone number, and address as well as brief descriptions of the scope of work. (No fewer than three references and no more than five).
- 10. Other.** Evidence of insurance coverage as required under Part III and any other information the Contractor or JHC deems relevant and would like JHC to consider.

**Basis for award.** The contract will be awarded to the firm whose proposal is determined by JHC to be the most advantageous to the Authority, with price and other technical factors considered.

Technical factors include:

- 1. Experience.** Firm's experience in performing physical needs assessments and/or energy audits. Emphasis should be placed on experience with public housing agencies, performing physical needs assessments and energy audits.
- 2. Qualifications.** Identify the qualifications of the principals and staff performing work. Staff members performing the PNA or the EA must meet the qualifications listed under Part III.

**Jackson Housing Commission  
RFP: JHC- 2020-2**

3. Approach/Work Plan. Firms must identify how they plan to undertake the activities under the Scope of Services provided in Part II, and the proposed timeline.
4. Section 3 and Small, Minority- and Women-Owned Businesses.
  - Firms must provide documentation regarding their status as either a Section 3 business concern or a small, minority- or woman-owned business concern.
  - Firms must submit separate plans as to how they intend to meet the individual requirements of 24 CFR 135 to provide economic opportunities for low-income persons in the jurisdiction of JHC and 24 CFR 200 for small, minority- and women-owned business enterprises.

Relative weight of technical evaluation factors:

<b>Factors</b>	<b>Points</b>
1. Experience.	30
2. Qualifications.	20
3. Approach/Work Plan.	20
4. Section 3/MBE.	10
5. Pricing.	20
<b>Total Points</b>	<b>100</b>

## Part VII. Evaluation Criteria And Selection Procedures

**Basis for award.** The contract will be awarded to the firm whose proposal is determined by JHC to be the most advantageous to the Authority, with price and other technical factors considered.

Technical factors include:

5. Experience. Firm's experience in performing physical needs assessments and/or energy audits. Emphasis should be placed on experience with public housing agencies, performing physical needs assessments and energy audits.
6. Qualifications. Identify the qualifications of the principals and staff performing work. Staff members performing the PNA or the EA must meet the qualifications listed under Part III.
7. Approach/Work Plan. Firms must identify how they plan to undertake the activities under the Scope of Services provided in Part II, and the proposed timeline.
8. Section 3 and Small, Minority- and Women-Owned Businesses.
  - Firms must provide documentation regarding their status as either a Section 3 business concern or a small, minority- or woman-owned business concern.
  - Firms must submit separate plans as to how they intend to meet the individual requirements of 24 CFR 135 to provide economic opportunities for low-income persons in the jurisdiction of JHC and 24 CFR 200 for small, minority- and women-owned business enterprises.

Relative weight of technical evaluation factors:

<u>Factors</u>	<u>Points</u>
6. Experience.	30
7. Qualifications.	20
8. Approach/Work Plan.	20
9. Section 3/MBE.	10
10. Pricing.	20
<b>Total Points</b>	<b>100</b>

Attachments

## ***List of Properties Covered by the RFP***

**1.3.** List of all properties, by project, with date of construction, total number of units, and (separately) number of public housing Annual Contributions Contract (ACC) units and including a listing of other community facilities to be included in the assessment.

**1.4.** Identifies, if applicable, any mixed-finance properties that contain public housing ACC units that are to be included in the PNA.

List of Properties						Project #	Total Units	ACC Unit Count
<b>Chalet Terrace</b>						MI03800001	129	129
Total Units	0 BR	1 BR	2 BR	3 BR	4BR/5BR	Target Population	Building Type	Year Built
102	8	24	20	36	12/2	Mixed	Townhouse	1965
26	0	0	0	26	0	Family	Single Family Homes	1992
List of Properties						Project #	Total Units	ACC Unit Count
<b>Shahan Blackstone North</b>						MI03800003	120	120
Total Units	0 BR	1 BR	2 BR	3 BR	4 BR	Target Population	Building Type	Year Built
108	0	0	74	30	4	Family	Townhouse	1980
12	0	0	0	12	0	Family	Single Family Homes	1992
<b>REED MANOR</b>						MI03800002	294	294
Total Units	0 BR	1 BR	2 BR	3 BR	4 BR	Target Population	Building Type	Year Built
294	201	82	11	0	0	Family	3 Story Highrise – 9 Buildings	1970

There are no Mixed Finance Properties.

## ***Cost Proposal -JHC 2020-2***

The contractor shall propose a firm fixed fee for all work performed under this RFP. The fee will be broken down to reflect the fee for the PNA, Energy Audit, and total fee as reflected herein. The fee breakdown shall be inclusive of all costs, including but not limited to labor, material, supplies, and other costs. The fee shall be broken down by the component parts as follows:

### **SUMMARY OF COSTS – CHALET TERRACE**

<b>1. RAD PNA Total Cost – CHALET TERRACE</b> (Bring Total from Following Pages) -	\$ _____
<b>2. Energy Audit Total Cost - CHALET TERRACE</b> (Bring Total from Following Pages) -	\$ _____
<b>Grand Total of Costs – CHALET TERRACE (Add 1. + 2.) -</b>	\$ _____

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### **SUMMARY OF COSTS – SHAHAN BLACKSTONE NORTH**

<b>1. RAD PNA Total Cost – SHAHAN BLACKSTONE NORTH</b> (Bring Total from Following Pages) -	\$ _____
<b>2. Energy Audit Total Cost - SHAHAN BLACKSTONE NORTH</b> (Bring Total from Following Pages)-	\$ _____
<b>Grand Total of Costs – SHAHAN BLACKSTONE NORTH</b> (Add 1. + 2.) -	\$ _____

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### **SUMMARY OF COSTS – REED MANOR**

<b>1. RAD PNA Total Cost – REED MANOR</b> (Bring Total from Following Pages) -	\$ _____
<b>2. Energy Audit Total Cost - REED MANOR</b> (Bring Total from Following Pages) -	\$ _____
<b>Grand Total of Costs – REED MANOR</b> (Add 1. + 2.) -	\$ _____

Firm/Company Name: \_\_\_\_\_

Firm's Authorized Representative: \_\_\_\_\_

Signature: \_\_\_\_\_

## **RAD PNA Cost Proposal Detail – CHALET TERRACE**

**A. Labor.** Provide a breakdown for each position and for all positions combined.

<u>Position</u>	<u>Hourly Rate</u>	<u>Estimated Hours</u>	<u>Extended Cost</u>	
1.	\$		\$	
2.	\$		\$	
<b>Total Labor Costs</b>			<b>Total \$</b>	_____

**B. Direct Costs.** Direct costs are costs that can be identified specifically with a project and therefore are charged to that project.

Materials		\$		
Travel		\$		
Other - Specify		\$		
<b>Total Direct Costs</b>			<b>Total \$</b>	_____

**C. Indirect Costs, if applicable.** Indirect costs are costs incurred for common or joint objectives and therefore cannot be readily and specifically identified with a particular direct project or activity.

Labor	\$	\$		
Non-labor	\$	\$		
Other - Specify				
<b>Total Indirect Costs</b>			<b>Total \$</b>	_____

**D. Subtotal.** Subtotal of all labor, direct and indirect costs      **SUBTOTAL \$** \_\_\_\_\_  
 (A+B+C)

**E. General, Administrative and Overhead.** State the percentage and total costs.

General		\$	
Administrative		\$	
Overhead		\$	
<b>Total General, Administrative and Overhead</b>			

**F. Profit.** State the percentage and total cost

Percentage			<b>Total \$</b>	_____
<b>G. Total PNA Cost Proposed (D+E+F)</b>			<b>Total \$</b>	_____

**Include cost for converting the results of the PNA and EA into the required RAD Physical Condition Assessment (PCA)**

## **ENERGY AUDIT Cost Proposal Detail – CHALET TERRACE**

**A. Labor.** Provide a breakdown for each position and for all positions combined.

<u>Position</u>	<u>Hourly Rate</u>	<u>Estimated Hours</u>	<u>Extended Cost</u>	
1.	\$		\$	
2.	\$		\$	
<b>Total Labor Costs</b>			<b>Total \$</b>	_____

**B. Direct Costs.** Direct costs are costs that can be identified specifically with a project and therefore are charged to that project.

Materials		\$		
Travel		\$		
Other - Specify		\$		
<b>Total Direct Costs</b>			<b>Total \$</b>	_____

**C. Indirect Costs, if applicable.** Indirect costs are costs incurred for common or joint objectives and therefore cannot be readily and specifically identified with a particular direct project or activity.

Labor	\$	\$		
Non-labor	\$	\$		
Other - Specify				
<b>Total Indirect Costs</b>			<b>Total \$</b>	_____

**D. Subtotal.** Subtotal of all labor, direct and indirect costs      **SUBTOTAL \$** \_\_\_\_\_  
 (A+B+C)

**E. General, Administrative and Overhead.** State the percentage and total costs.

General		\$	
Administrative		\$	
Overhead		\$	
<b>Total General, Administrative and Overhead</b>			

**F. Profit.** State the percentage and total cost

Percentage      Total \$ \_\_\_\_\_

**G. Total ENERGY AUDIT Cost Proposed (D+E+F)**      **Total \$** \_\_\_\_\_

**Include cost for converting the results of the PNA and EA into the required RAD  
Physical Condition Assessment (PCA)**

## RAD PNA Cost Proposal Detail – SHAHAN BLACKSTONE NORTH

**A. Labor.** Provide a breakdown for each position and for all positions combined.

<u>Position</u>	<u>Hourly Rate</u>	<u>Estimated Hours</u>	<u>Extended Cost</u>	
3.	\$		\$	
4.	\$		\$	
<b>Total Labor Costs</b>			<b>Total \$</b>	_____

**B. Direct Costs.** Direct costs are costs that can be identified specifically with a project and therefore are charged to that project.

Materials		\$		
Travel		\$		
Other - Specify		\$		
<b>Total Direct Costs</b>			<b>Total \$</b>	_____

**C. Indirect Costs, if applicable.** Indirect costs are costs incurred for common or joint objectives and therefore cannot be readily and specifically identified with a particular direct project or activity.

Labor	\$	\$		
Non-labor	\$	\$		
Other - Specify				
<b>Total Indirect Costs</b>			<b>Total \$</b>	_____

**D. Subtotal.** Subtotal of all labor, direct and indirect costs      **SUBTOTAL \$** \_\_\_\_\_  
 (A+B+C)

**E. General, Administrative and Overhead.** State the percentage and total costs.

General		\$	
Administrative		\$	
Overhead		\$	
<b>Total General, Administrative and Overhead</b>			

**F. Profit.** State the percentage and total cost

Percentage			<b>Total \$</b>	_____
<b>G. Total PNA Cost Proposed (D+E+F)</b>			<b>Total \$</b>	_____

Include cost for converting the results of the PNA and EA into the required RAD Physical Condition Assessment (PCA)

## ENERGY AUDIT Cost Proposal Detail – SHAHAN BLACKSTONE NORTH

**A. Labor.** Provide a breakdown for each position and for all positions combined.

<u>Position</u>	<u>Hourly Rate</u>	<u>Estimated Hours</u>	<u>Extended Cost</u>	
3.	\$		\$	
4.	\$		\$	
<b>Total Labor Costs</b>			<b>Total \$</b> _____	

**B. Direct Costs.** Direct costs are costs that can be identified specifically with a project and therefore are charged to that project.

Materials		\$	
Travel		\$	
Other - Specify		\$	
<b>Total Direct Costs</b>		<b>Total \$</b> _____	

**C. Indirect Costs, if applicable.** Indirect costs are costs incurred for common or joint objectives and therefore cannot be readily and specifically identified with a particular direct project or activity.

Labor	\$	\$	
Non-labor	\$	\$	
Other - Specify			
<b>Total Indirect Costs</b>		<b>Total \$</b> _____	

**D. Subtotal.** Subtotal of all labor, direct and indirect costs      **SUBTOTAL \$** \_\_\_\_\_  
 (A+B+C)

**E. General, Administrative and Overhead.** State the percentage and total costs.

General		\$	
Administrative		\$	
Overhead		\$	
<b>Total General, Administrative and Overhead</b>			

**F. Profit.** State the percentage and total cost

Percentage		<b>Total \$</b> _____	
<b>G. Total ENERGY AUDIT Cost Proposed (D+E+F)</b>		<b>Total \$</b> _____	

Include cost for converting the results of the PNA and EA into the required RAD  
 Physical Condition Assessment (PCA)

## **RAD PNA Cost Proposal Detail – REED MANOR (Optional)**

**A. Labor.** Provide a breakdown for each position and for all positions combined.

<u>Position</u>	<u>Hourly Rate</u>	<u>Estimated Hours</u>	<u>Extended Cost</u>	
5.	\$		\$	
6.	\$		\$	
<b>Total Labor Costs</b>			<b>Total \$</b>	_____

**B. Direct Costs.** Direct costs are costs that can be identified specifically with a project and therefore are charged to that project.

Materials		\$		
Travel		\$		
Other - Specify		\$		
<b>Total Direct Costs</b>			<b>Total \$</b>	_____

**C. Indirect Costs, if applicable.** Indirect costs are costs incurred for common or joint objectives and therefore cannot be readily and specifically identified with a particular direct project or activity.

Labor	\$	\$		
Non-labor	\$	\$		
Other - Specify				
<b>Total Indirect Costs</b>			<b>Total \$</b>	_____

**D. Subtotal.** Subtotal of all labor, direct and indirect costs      **SUBTOTAL \$** \_\_\_\_\_  
 (A+B+C)

**E. General, Administrative and Overhead.** State the percentage and total costs.

General		\$	
Administrative		\$	
Overhead		\$	
<b>Total General, Administrative and Overhead</b>			

**F. Profit.** State the percentage and total cost

Percentage			<b>Total \$</b>	_____
<b>G. Total PNA Cost Proposed (D+E+F)</b>			<b>Total \$</b>	_____

**Include cost for converting the results of the PNA and EA into the required RAD Physical Condition Assessment (PCA)**

## ENERGY AUDIT Cost Proposal Detail – REED MANOR (optional)

**A. Labor.** Provide a breakdown for each position and for all positions combined.

<u>Position</u>	<u>Hourly Rate</u>	<u>Estimated Hours</u>	<u>Extended Cost</u>	
5.	\$		\$	
6.	\$		\$	
<b>Total Labor Costs</b>			<b>Total \$</b>	_____

**B. Direct Costs.** Direct costs are costs that can be identified specifically with a project and therefore are charged to that project.

Materials		\$		
Travel		\$		
Other - Specify		\$		
<b>Total Direct Costs</b>			<b>Total \$</b>	_____

**C. Indirect Costs, if applicable.** Indirect costs are costs incurred for common or joint objectives and therefore cannot be readily and specifically identified with a particular direct project or activity.

Labor	\$	\$		
Non-labor	\$	\$		
Other - Specify				
<b>Total Indirect Costs</b>			<b>Total \$</b>	_____

**D. Subtotal.** Subtotal of all labor, direct and indirect costs      **SUBTOTAL \$** \_\_\_\_\_  
 (A+B+C)

**E. General, Administrative and Overhead.** State the percentage and total costs.

General		\$	
Administrative		\$	
Overhead		\$	
<b>Total General, Administrative and Overhead</b>			

**F. Profit.** State the percentage and total cost

Percentage			<b>Total \$</b>	_____
<b>G. Total ENERGY AUDIT Cost Proposed (D+E+F)</b>			<b>Total \$</b>	_____

Include cost for converting the results of the PNA and EA into the required RAD  
Physical Condition Assessment (PCA)

**Laurie Ingram  
Executive Director**

**REFERENCE AND PAST PERFORMANCE FORM**  
**(NOTE: Reproduce Additional Sheets As Required)**

List previous work/services rendered by your company which are 1) **DIRECTLY** related to the scope of work/services required by JHC, Request for Proposals, Request for Qualifications or Invitation For Bid and 2) equal to or greater than the dollar magnitude applicable to the scope of work/services quoted in your proposal.

**NOTE: A Minimum of three (3) reference sheets is required.**

**A questionnaire will be emailed to each reference. If a questionnaire is not returned by a reference, the offeror receives a zero (0) score for that reference. Offerors are highly encouraged to work closely with their references to ensure that the questionnaires are returned in a timely manner.**

1. Name of Reference Company for which services were rendered:

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2. Location of work (address) where services were performed:

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3. Scope of work that was performed:

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Year of completion: \_\_\_\_\_

4. Contact Person: \_\_\_\_\_

Phone No: \_\_\_\_\_

Email Address: \_\_\_\_\_

5. Cost of Project: \_\_\_\_\_

## **ACKNOWLEDGEMENT OF ADDENDA FORM**

Bidder has received the following Addenda, the receipt of which is hereby acknowledged:

Addendum Number: \_\_\_\_\_ Date Received: \_\_\_\_\_

\_\_\_\_\_  
(Company Name)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Printed or Typed Name)