



JHC-2020-3
Request for Proposals

Master Planning , Architect and Engineering Services

Issue Date: July 7, 2020

Jackson Housing Commission
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Jackson Housing Commission

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Part I. Solicitation Information

A. *Description of Services*

This Request for Proposals is to identify one or two A&E firms to work with JHC (Jackson Housing Commission) through the issuance of various task orders. The selected Firm(s) will be responsible for Master Planning, Design, Site Engineering, and Architectural Services necessary to successfully carry out the capital improvements and/or redevelopment of the JHC properties in accordance with requirements. Interested individuals, firms or entities with experience in the provision of Architectural and Engineering Services of mixed-income, mixed-use development and the City of Jackson development process are encouraged to respond to this Request for Proposals or partner/subcontract in a response to this Request for Proposals.

B. *Important Due Dates/ Locations/ Time*

Schedule	
Event	Date
RFP Publication	July 7, 2020 at 12:00 PM EST
RFP Published Locations	1. Housing Agency Marketplace- ha.internationalprocurement.com 2. Public Housing Agency Director Association- phada.org 3. JacksonHousing-MI.org
Pre-Proposal Conference	<u>July 22, 2020 at 1:00PM, EST</u> - Call in info will be posted as an addendum prior to July 22, 2020
Questions Due	July 24, 2020 at 12:00PM, EST
Proposals Submittal Deadline	August 14, 2020 at 4:00PM, EST

All questions concerning this RFP must be submitted in writing no later than July 24, 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 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-responsive.
8. The JHC shall not be under any obligation to compensate any bidder/responder for any cost incurred in responding to this bid/RFQ 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 performance period of this Contract shall be twenty-four (24) months, starting from the date of the JHC's Notice to Proceed and may be extended for an additional three (3) periods of twelve (12) months each for a total of sixty (60) months, based on satisfactory performance and mutual consent.

c. Contract Service Standards

All work performed pursuant to this "Request for Proposals" or any subsequent Contract 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 selected firm shall submit an invoice to the JHC for work completed. The firm 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 (prime/partner & Subcontractor to submit)	SIGNATURE REQUIRED	NOTARY /CORPORATE SEAL REQUIRED	FOR YOUR REVIEW
Documents as outline in Part VII. Submission Requirements	X	X (Letter of Interest)		
Acknowledgements, Certifications and Required Documents as listed below:				
<i>JHC Profile of Firm Form – Attached</i>	X	X		
<i>JHC Reference Form- Attached</i>	X			
<i>Architect & Engineering Fee Schedule - Attached</i>	X	X		
<i>EEO Statement- Attached</i>	X	X		
<i>Acknowledgement of addenda form- Attached</i>	X	X		
<i>Non – Collusive Affidavit – Attached</i>	X	X	X	
<i>HUD 50071- Certification of Payments to Influence Federal Transactions – Attached</i>	X	X		
<i>Standard Form 330 – Attached</i>	X	X		
<i>Standard Form 254 – Attached</i>	X	X		
<i>Bidders Statement- JHC Website</i>	X	X		
<i>Section 3 Compliance- JHC Website</i>	X	X		
<i>HUD 5369-C Certifications and Representations of Offers- Non-Construction- JHC Website</i>	X	X		
<i>HUD FORM (HUD-5369-B) Instructions to Offerors- Non-Construction- JHC Website</i>				X
<i>HUD 5370 C- HUD General Conditions-Non-Construction Section I and II- JHC Website</i>				X
<i>Appendix 1- Scope of Work- JHC RPCA for Rad</i>				X
<i>Appendix 2- Relevant City of Jackson Redevelopment Plan</i>				X

Part V. Requirements

1. Background

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 JHC. Interested individuals, firms or entities with experience in the provision of Architectural and Engineering Services of mixed-income, mixed-use development and the City of Jackson development process are encouraged to respond to this Request for Proposals or partner/subcontract in a response to this Request for Proposals.

JHC applied to the HUD RAD (Rental Assistance Demonstration) program and received approved CHAPs (Commitment for Housing Assistance Program) for their three properties totaling over 500 units.

Excerpted From: HUD.GOV/RAD

RAD was created in order to give public housing authorities (PHAs) a powerful tool to preserve and improve public housing properties and address the \$26 billion dollar nationwide backlog of deferred maintenance.

Five Things You Should Know About Public Housing Conversions

1. RAD allows public housing agencies to **leverage public and private debt and equity in order to reinvest in the public housing stock**. This is critical given the backlog of public housing capital needs - estimated at over \$35 billion **nationwide**.
2. In RAD, units move to a Section 8 platform with a long-term contract that, by law, must be renewed in perpetuity. A Use Agreement is also recorded under RAD further enforcing HUD's long-term interest. **This ensures that the units remain permanently affordable to low-income households.**
3. Residents benefit from a right of return, a prohibition against re-screening, and robust notification and relocation rights. Residents continue to pay 30% of their adjusted income towards the rent, **maintain the same basic rights** as they possess in the public housing program, and gain a new option to request tenant-based assistance if they wish to subsequently move from the property.
4. RAD **maintains the ongoing public stewardship** of the converted property through clear rules requiring ongoing ownership or control by a public or non-profit entity.
5. RAD is highly cost-effective, **relying on shifting existing levels of public housing funds to the Section 8 accounts** as properties convert.

See HUD.GOV/RAD for more information.

JHC desires to convert their entire public housing portfolio to a Section 8 platform using RAD. A solicitation for the RAD Physical Capital Needs Assessment (PCNA) is currently on the street and once

the assessments are underway and the financial feasibility is conducted, should RAD not be viable, then JHC will look to other HUD programs and tools to modernize, rehabilitate or redevelop its housing stock and achieve the goal of 20 year viability.

To perform the conversions and improvements to the housing stock,

- The properties must be evaluated for their long term capital needs (see Appendix 1 of this RFP for the Scope of this type of evaluation: PNA (Physical Needs Assessments) and EA (Energy Assessments) along with the Initial and 20 year Capital Needs projections which are then translated to the required structure to convert under the RAD Program. Since these evaluations will form the initial basis for determining a property's needs, JHC intends for the Architect to weigh in on these evaluations which will be completed by individuals/firms experienced in the HUD requirements for Capital Needs Assessments.
- JHC anticipates funding such as debt, equity, tax credits, grants and other public funds will be required to do all of the initial capital improvements/redevelopment. Additionally, to convert the properties and complete the capital improvements/construction will happen in phases depending on the amount of funds required for the capital improvements. JHC intends for the Architect to be experienced in the types of requirements required to successfully receive the aforementioned funding.
- JHC currently anticipates one public housing development will need minimal improvements in the current term (120 units), a second public housing development will require significant rehab in the current term (129 units) and the 3rd property will need to be newly constructed with a minimum of one-for-one replacement units with considerations of the City of Jackson's plans for the neighborhood (294 units). See Appendix 2 for the link to the City of Jackson Master Plan and excerpts from the Jackson Anchor Initiative Downtown Master Plan. JHC is at the initial stages of developing approaches regarding the housing stock and the above noted anticipated direction may change as additional information regarding the condition of the housing stock becomes known. JHC intends for the Architect to gain an understanding of the City's plans and assist in the development of a mutually beneficial partnership with the City such that JHCs requirements can be prioritized within the City.
- JHC desires to consider improvements to the housing stock that may not be related to the data gathered during the above noted PNAs and EAs that would benefit the residents and community supportive services initiatives - Eg. modernizations such as providing internet access capability to all units, property beautification projects, security enhancements and design elements which promote health and well-being. JHC intends for the Architect to work with the community and other stakeholders where necessary to lay out these plans within the funding budgets as identified above.
- JHC will require architectural and engineering and related services to complete the RAD conversions, obtain funding and complete the construction related activities.

The following is a list of the possible primary architectural and engineering functions; this list is not all inclusive:

- Engineering Services: Civil, Structural, Electrical, Mechanical, Geotechnical and Energy Services
- Needs Assessments: Physical and Environmental

- Plans, Drawings, & Technical Specifications
- Cost Estimating
- Review of Planning documents for Construction Management
- Architectural Services: Spatial Layouts, LEED, ADA/UFAS, & Construction Administration

To satisfy the requirements under this RFP, JHC will procure 1 or 2 Indefinite Quantity/Indefinite Delivery (IDIQ) contracts (ie – 1-2 architects will be selected under this RFP). As specific work under this RFP is further defined, Task Orders will be issued to the firm(s) that will specify their specific development/scope of work and dollar amount for the work and will be awarded based on funding availability. The contract term will be for two (2) base years with three (3) one-year option periods.

Part VI. Scope of Services

The Architect/Engineering firm(s) selected under this RFP will be an integral partner in the effort to assist JHC to rehab or redevelop current public housing to serve middle, moderate and low income families and residents of the City of Jackson based on the requirements and approvals of HUD. The selected firm will be required to work closely with JHC, its consultant(s), residents, and other community stakeholders where necessary, throughout the conversion efforts for these current public housing sites.

The selected firm(s) will be responsible for provision of all necessary Architectural and Engineering Services that may include but are not limited to the following:

- Analyzing PNAs, EAs and other relevant information to assist in the development of a rehab/new construction strategy for the public housing site(s).
- Prepare a Master Plan if needed for the site(s) in collaboration with JHC that maximizes density but remains consistent with all applicable Neighborhood Plans and requirements set forth by the City of Jackson.
- Coordinate design charrettes to secure support of any Master Plans from the City, the existing Residents; and other Community Stakeholders where necessary.
- Prepare a final development plan including all necessary design documents for financing applications.
- Prepare all related engineering and construction documents for each phase of the redevelopment project.
- Provide all architectural and engineering supervision services during construction.
- Approve and authorize construction progress payments.
- Ensure phase/project completion in a timely and cost-effective manner.
- Ensure issuance of required occupancy permits and follow up on warranty items.
- Provide all other related services as requested by JHC.

A. Design Services

1. Meet with JHC staff and consultants, Board of Commissioners, Tenant Resident Councils, City officials and other stakeholders to discuss goals, needs and functions of the development(s); design expectations and available budget; and pertinent building codes and zoning regulations.

2. The Architect shall assist JHC with arriving at realistic budget(s) for design and building by leading JHC through a discussion about the ramifications of several design approaches in light of local costs for material and construction. The architect and owner are to discuss the goals, needs, and function of the development(s); design expectations and available budget; and pertinent building code and zoning regulations. Discuss the neighborhoods history and stakeholders' visions for the new development(s).
3. Create a space program and flow diagram for the development(s).
4. Assess the existing space to determine why the goals and objectives cannot be met based on agency space utilization standards and expected outcomes.
5. Make recommendations to establish the development(s) schedule and provide scheduling and resource analysis.
6. If new construction, conduct a charrette with residents and other community stakeholders where necessary, to determine their goals and objectives for the development(s).
7. When the development(s)t requirements have been sufficiently identified, Architect shall prepare a preliminary estimate of the Cost of the Work. The Cost of the Work shall be the total cost of the Development(s).

B. Site Analysis

Inspect the site for utilities and assess drainage, terrain and accessibility. Coordinate with JHC and/or JHC environmental consultants in order to determine if any have already conducted a Phase I and Phase II Environmental Site assessment. Determine the best location and orientation for the structure. Discuss findings with JHC and other stakeholders before the formal presentation of design concepts.

C. Zoning Analysis

Conduct a zoning analysis to determine as of right zoning. Ensure that space program complies with zoning regulations or propose changes to said regulations.

D. Schematic Design Documents

1. Develop Schematic Design Documents with space conforming to local codes. Provide a scaled model of the future construction. Prepare preliminary applications to state and local transportation and building authorities as required.

The Schematic Design Documents shall be based upon the most recent JHC approved program, schedule and estimate for the Cost of Work. The schematic drawings shall establish scaled relationships among the development(s) components and shall include plans, sections, elevations, study models, perspective sketches, schematic diagrams, and narratives of major enclosure, electrical, mechanical, and structural systems, survey of applicable codes, and the value of engineering analysis and reports noted herein. Architect will report in writing to JHC any deviations between JHC-provided information of programs and the design presented.

2. Conduct a charrette with residents and other community stakeholders where necessary, prior to completing Schematic Design documents to ensure that their goals and objectives have been, to extent feasible, incorporated into the documents.

Architect shall not be responsible for permit fees; and services relating to the identification, investigation and/or removal of hazardous materials. JHC shall provide a topographic/boundary survey to be used as the basis for the site plan.

E. Design Development Documents

Architect shall provide Design Development Documents based on the approved Schematic Design Documents and updated budget for the Cost of the Work. The Design Development Documents shall illustrate and describe the refinement of the design of the development(s), establishing the scope, relationships, forms, size and appearance of the development(s) by means of plans, sections and elevations, typical construction details, and equipment layouts. The Design Development Documents shall include specifications that identify major materials and systems and establish in general their quality levels. Architect will report in writing to JHC the nature and magnitude of any deviations between the Design Development Documents presented by Architect and JHC-approved design and JHC-provided information or programs.

F. Construction Documents

Architect shall provide Construction Documents based on the approved Design Documents and updated budget for the Cost of the Work. The Construction Documents shall set forth in detail the requirements for construction of the development(s). The Construction Documents shall include Drawings and Specifications that establish in detail the quality levels of materials and systems required for the development(s). During the development of the Construction Documents, Architect shall assist JHC in the development and preparation of the Conditions of the Contract for Construction (General, Supplementary and other Conditions).

G. Construction Procurement Services

Architect shall assist JHC in obtaining either competitive bids or negotiated proposals and shall assist JHC in awarding and preparing contract documents for construction. Architect shall assist JHC in establishing a list of prospective bidders or contractors. Architect shall assist JHC in bid validation or proposal evaluation and in the determination of the successful bid or proposal, if any. If requested by JHC, Architect shall notify all prospective bidders or contractors of the bid or proposal results. Architect shall prepare Bidding Documents that shall consist of bidding requirements, proposed contract forms, General Conditions and Supplementary Conditions, Specifications and Drawings. Architect shall consider requirements for substitutions, if permitted by the Bidding Documents, and shall prepare and report to JHC on a proposed addenda identifying approved substitutions to all prospective bidders. Architect shall participate in, at JHC's direction, a pre-bid conference for prospective bidders. Architect shall, at the request of JHC, prepare responses to questions from prospective bidders and provide clarifications and interpretations of the Bidding Documents to all prospective bidders in the form of addenda. Architect shall work with the successful contractor(s) to value engineer projects within budget constraints.

H. Construction Administration

1. Architect, as directed by JHC, shall visit the construction site at intervals appropriate to the stage of the Contractor's operations, or as otherwise agreed by JHC and Architect herein, 1) to become familiar with and to keep JHC informed about the progress and quality of the portion of the Work completed; 2) to guard JHC against defects and deficiencies in the Work; and 3) to determine if the Work is being performed in a manner indicating that the Work, when fully completed, will be in accordance with the Contract Documents. Architect shall neither have control over or charge of, and shall not be responsible for the construction means, methods, techniques, sequences or procedures, or for safety precautions and programs in connection with the Work, since these will be solely the Contractor's rights and responsibilities under the Contract Documents. Architect shall report to JHC known deviations from the Contract Documents and from the most recent construction schedule submitted by the Contractor. Architect shall at all times have access to the Work wherever it is in preparation or progress.
2. Architect shall prepare a list of all anticipated submittals together with a schedule for said submittals. Architect shall review all submittal and shop drawings for compliance and coordination with the Contract Documents.
3. Architect shall respond to Requests for Information (RFI) as submitted by the Contractor during construction within 10 days of the submitted request.
4. Architect shall prepare Change Orders and Construction Change Directives for JHC's review, approval and execution in accordance with the Contract Documents. If necessary, Architect shall prepare, reproduce and distribute Drawings and Specifications to describe Work to be added, deleted or modified. Architect shall analyze written requests by JHC or the Contractor for changes in the Work, including requests for adjustments to the Contract Sum or Contract Time, and shall report the results of its analysis in writing to JHC and the Contractor within a reasonable period of time but in no case later than ten (10) business after Architect's receipt of the request. If Architect determines that implementation of the requested changes would result in a material change to the Contract that may cause an adjustment in the Contract Time or Contract Sum, Architect shall make a recommendation to JHC, which may authorize further investigation of such change. Upon such authorization, and based upon information furnished by the Contractor, if any, Architect shall estimate the additional cost and time that might result from such change, including any additional costs attributable to a Change in Services of Architect. With JHC's approval, Architect shall incorporate those estimates into a revised Cost of the Work.

I. Additional Services

At the discretion of JHC, JHC may require the Architect to solicit for and retain sub-consultants necessary to complete various environmental and geotechnical tests, topographical and land surveys

monitoring, inspection services, structural analyses, and special inspection services. These services include but are not limited to, Special Inspector during Construction Services, soil test borings and other services identified during the course of implementation.

MINIMUM REQUIREMENTS

The following minimum qualifications **MUST** be met:

JHC desires to minimize costs relating to identifying, developing and securing local relationships which may be beneficial to executing the City of Jackson Master Planning, obtaining funding and construction related activities. Additionally, JHC wants to reduce costs resulting from possible required travel along with minimizing out-of-area travel that could pose health risks, such as COVID 19. Therefore, JHC encourages local participation to the extent possible.

1. Respondent firms should have significant experience (10 or more years) with large mixed income, mixed finance and LIHTC development projects.
 - A minimum of 10 years of demonstrated experience in compliance with city, state and federal building codes, including but not limited to OSHA, Environmental Regulations for asbestos and lead-based paint, HUD REAC standards, MSHDA Building Standards and ADA's Uniform Federal Accessibility Standard (UFAS), Americans with Disabilities Act (ADA), Enterprise Green Communities Standard, U.S. Green Building Council's Leadership in Energy and Environmental Design (LEED) rating system, IECC, ASHRAE, and Energy Star. This information **MUST** be outlined when completing Standard Form 330.
 - Design and engineering services in conformance with applicable Federal, State of Michigan and City of Jackson statutes, ordinances, rules, regulations and design standards including knowledge of how to apply to new construction and major rehab the provisions of Title V III of the Civil Rights Act of 1968, as amended, commonly known as The Fair Housing Act (the Act) directs the Secretary of HUD to provide technical assistance to States, local governments, and other persons in implementing the accessibility requirements of the Act. Section 804(f) (3) (c) requires that all residential buildings which have four or more units and are built for first occupancy after March 13, 1991 (referred to in the Act as "covered multifamily dwellings"), be designed and constructed to have at least one building entrance on an accessible route, unless it is impracticable to do so because of terrain or unusual site characteristics. Such dwellings must provide for accessibility in all common and public areas. In addition, certain accessibility requirements must be included in all of the dwelling units in buildings with elevators, and in all of the ground floor dwelling units in buildings without elevators.
2. Disciplines and expertise that may be required to accomplish the scopes of the task orders may include but are not limited to: architecture, mechanical, electrical, plumbing, civil, structural, fire protection, life safety, security, blast, risk assessment, space planning, real estate market analysis, interior architecture, historic preservation, estimating, master land planning, report writing, quality control review, scheduling, surveying, green building.

3. The following minimum qualifications **MUST** be met for each member of the proposed team assigned to the JHC projects performing professional services such as planning activities, drawings, etc:
 - Architects must be licensed for a minimum of 5 years, including meeting the requirements of the Michigan Bureau of Professional Licensing (BPL) within the Michigan Department of Licensing and Regulatory Affairs (LARA). Note the New Architect General Rules effective as of February 20, 2020.
 - Professional Engineers must be licensed for a minimum of 5 years, including meeting the requirements of the Michigan Bureau of Professional Licensing (BPL) within the Michigan Department of Licensing and Regulatory Affairs (LARA).
 - Other disciplines that may be assigned to JHC projects that are required to be licensed must be licensed for a minimum of 5 years, including meeting the requirements of the Michigan Bureau of Professional Licensing (BPL) within the Michigan Department of Licensing and Regulatory Affairs (LARA).

Part VII. 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. This letter should state that the Proposal is open for 120 days from the date of the RFP and should be signed.
2. **Table of Contents.** A table of contents shall be provided that lists each section of the proposal as required by Part VII of this RFP.
3. **Executive Summary.** Give a brief description of the firm, any partner/subcontractor relationships if applicable and the understanding of the scope of work. This should be no more than 2 pages.
4. **Qualifications.** Provide a list of staff members who will work on this contract, a description of these individuals and their qualifications working with RAD and/or Mixed-Finance, Mixed-Income Redevelopment.
5. **Experience.** Provide 2-3 projects completed or substantially completed within the past 5 years with a description of the relevant work accomplished along with renderings and pictures of the projects. Include the Total Development Cost, Sources and the role of the A&E firm. Also provide the contracting organization and contact information. Also include if the project was completed on time and within budget.
6. **Familiar with City of Jackson Development Processes.** Include the firms experience working in the City of Jackson Michigan and obtaining entitlements, permits and other local approvals in a timely manner.
7. **Approach/Work Plan.** Provide information identifying how the firm plans to undertake the activities under the Scope of Services provided in Part VI, and the proposed timeline.
8. **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 on the reference for provided. (No fewer than three references and no more than five).
9. **HUD/JHC Forms.** See Part IV. Index of Submittal Documents for list of HUD and JHC Forms to be included with the Proposal. Additionally, attach copies of relevant licenses or list verifiable license information.
10. **Other.** Any other information the Contractor deems relevant and would like JHC to consider.

Fee Structure. Provide Fee Structures separate from the proposal. Show each staff member/position and hourly rates (fully loaded). Also show other costs, including travel, general, administrative, overhead, and profit.

1. The initial selection of a contractor for this RFP will include an evaluation of the firm's rates.
2. As projects are outlined, the firm will be requested to provide scopes for the individual projects along with fixed fee or not to exceed pricing

Part VIII. 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 JHC, with price and other technical factors considered.

Technical factors include:

1. **Experience.** Firm and consultant personnel who will be directly involved with the project: Experience and knowledge in developing similar plans with multiple elements. Emphasis placed on experience with:
 - 1.1. Public housing authorities,
 - 1.2. Not-For-Profit Organizations performing similar housing development activities,
 - 1.3. Governmental Organizations,
 - 1.4. Reviews of physical needs assessments and energy audits, and the assessment of Capital Needs Projections
 - 1.5. Development and execution of Master Plans
 - 1.6. Creation of Architectural plans that meet the requirements for the property and funding sources, in particular tax credits
 - 1.7. Construction Procurement and Administration services
 - 1.8. References
2. **City of Jackson Development Process** – Firms experience with the City of Jackson Development Process
3. **Qualifications.** Identify the qualifications of the principals and staff performing work.
4. **Approach/Work Plan.** Firms must identify how they plan to undertake the activities under the Scope of Services and the proposed timeline.
 - 4.1. Identify their understanding of the JHC projects
 - 4.2. Propose how they may fit into the broader context of the City of Jackson Master Plan and the Jackson Anchor Initiative for Downtown
 - 4.3. Ability to involve partners and stakeholders in the planning process
 - 4.4. Ability to maintain communication on plan development
 - 4.5. Participate in Planning Process, Drawings Process and sign-offs during the construction phases as required
 - 4.6. Ability to complete the various projects within given timeframes
5. **Section 3 and Small, Minority- and Women-Owned Businesses.**

- 5.1. Firms must provide documentation regarding their status as either a Section 3 business concern or a small, minority- or woman-owned business concern.
- 5.2. 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.
- 6. **Fee Structure**. Hourly rates are required. Selected firm(s) will be provided task orders by JHC, whereby the firm will provide a Fixed Fee or Not to exceed price for the specific task.

Relative weight of technical evaluation factors:

<u>Factors</u>	<u>Points</u>
1. Experience.	30
2. City of Jackson Development Process	10
3. Qualifications.	20
4. Approach/Work Plan.	20
5. Section 3/MBE.	10
6. Fee Structure.	10
Total Points	100

Attachments & Appendices

JHC Profile of Firm Form

Firm Name _____

Business Address _____

City _____ State _____ Zip Code _____

Federal Tax ID No.: _____

Local Business License No. (if applicable): _____

State of Michigan License Type and No (if applicable): _____

Federal License Type and No (if applicable): _____

Names and Titles of Two Contact Persons:

1. _____ Phone (____) _____

2. _____ Phone (____) _____

Submittal is for: Parent Company Division Subsidiary Branch Office Subcontractor

Type of Firm:

- Corporation
- Partnership
- Sole Ownership
- Joint Venture

Name, Title and Percentage of Ownership of Principals/Partners in Firm (attach a brief resume of each principal/partner)

Name	Title	% of Ownership

Name & Address of Parent Company, if applicable:

Former Firm Name(s), if applicable:

Please indicate if your firm is a Minority Owned Business Enterprise.

Yes No

If yes, please indicate the appropriate category:

Black Americans Hispanic Americans Native Americans Asian Pacific Americans
 Asian Indian Americans Hasidic Jewish Americans

Please indicate if your firm is a Women Owned Business Enterprise.

Yes No

Insurance

Workers Compensation Insurance Carrier: _____

Policy No.: _____

Expiration Date: _____

General Liability Insurance Carrier: _____

Policy No.: _____

Expiration Date: _____

Professional Liability Insurance Carrier: _____

Policy No.: _____

Expiration Date: _____

Signature: _____

Authorized Signer (Print Name): _____

Date: _____

JHC Reference Form

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:

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

3. Scope of work that was performed:

Year of completion: _____

4. Contact Person: _____

Phone No: _____

Email Address: _____

5. Cost of Project: _____

ARCHITECTURAL & ENGINEERING FEE SCHEDULE

DISCIPLINE	(A) RATE/ HOUR	(B) OVERHEAD	(C) PROFIT	(A)+(B)+(C) BASE YEARS (Years 1 & 2) HOURLY RATE \$	OPTION YEAR 1 (Year 3) HOURLY RATE \$	OPTION YEAR 2 (Year 4) HOURLY RATE \$
PRINCIPAL ARCHITECT						
PROJECT ARCHITECT						
ARCHITECT						
DRAFTSMAN/CADD OPERATOR						
CLERICAL						
CIVIL ENGINEER						
STRUCTURAL ENGINEER						
SPECIFICATION WRITER						
PRINCIPAL ELECTRICAL ENGINEER						
ELECTRICAL ENGINEER						
PRINCIPAL MECHANICAL ENGINEER						
MECHANICAL ENGINEER						
GEOTECHNICAL ENGINEER						
STRUCTURAL ENGINEER						
INDUSTRIAL HYGIENIST						
COST ESTIMATOR						
PROJECT MANAGER						
INSPECTOR						
OTHER- (PLEASE SPECIFY)						

AVERAGE HOURLY RATE					
---------------------	--	--	--	--	--

Task Orders may span across a year(s). Task Orders will generally be for Fixed Fee amounts generated using the above hourly rates. Hourly Rates used for Task Orders are the rates applicable at the time the Task Order is approved for the time period the Task Order is projected to be performed. Ex – Task Order approved in Year 2, has X # projected hours of performance in Year 2 and X # projected hours of performance in Year 3 – should be priced:

1. using the rates for Year 2 for the projected # of hours for Year 2 plus
2. using the rates for Year 3 for the projected # of hours for Year 3

Task Order prices will not be changed for differences in yearly hourly rate changes.

Option Year 3 (year 5) rates are to be negotiated prior to the start of the year.

Prepared by:

Print Name: _____ Signature: _____

Firm: _____ Date: _____

(Bidder/Offeror must use this format to submit a EEO Policy Statement or submit their company EEO Policy Statement. This statement must be on company letterhead.)

EQUAL EMPLOYMENT OPPORTUNITY (EEO) POLICY STATEMENT

(Company name) _____ will not discriminate against any employee or applicant for employment because of race, color, religion ,national origin, sex, age, marital status, personal appearance, sexual orientation, family responsibilities, matriculation, political affiliation, or mental or physical disability.

(Company name) _____ will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion ,national origin, sex, age, marital status, personal appearance, sexual orientation, family responsibilities, matriculation, political affiliation, or mental or physical disability. The affirmative action shall include, but not be limited to, the following: (A) employment, upgrading, or transfer, (B) recruitment or recruitment advertising, (C) demotion, layoff, or termination; (D) rates of pay, or other forms of compensation; and (E) selection for training and apprenticeship.

(Company name) _____ agrees to post in conspicuous places available to employees and applicants for employment the provisions of this statement concerning non-discrimination and affirmative action.

(Company name) _____ agrees that all qualified applicants will receive consideration for employment without regard to race, color, religion ,national origin, sex, age, marital status, personal appearance, sexual orientation, family responsibilities, matriculation, political affiliation, or mental or physical disability.

(Company name) _____ agrees to permit access to all books and records pertaining to its employment practices and to require each subcontractor to permit access to its books and records.

(Company name) _____ agrees to comply with all guidelines for equal employment opportunity applicable in the County/City of Jackson.

(Company name) _____ shall include in every subcontract equal opportunity clauses, so that such provisions shall be binding upon each subcontractor or vendor.

Signature: _____
Authorized Official and Title: _____
Firm /Organization Name: _____
Solicitation No.: _____
Date: _____

ACKNOWLEDGEMENT OF ADDENDA FORM

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

Addendum Number: _____ Date Received: _____

Addendum Number: _____ Date Received: _____

Addendum Number: _____ Date Received: _____

Addendum Number: _____ Date Received: _____

Addendum Number: _____ Date Received: _____

(Company Name)

(Signature)

(Printed or Typed Name)

FORM OF NON-COLLUSIVE AFFIDAVIT
(PRIME BIDDER)

State of _____

County of _____

_____, being first duly sworn, deposes and says that:

- 1) He/She is owner, partner, officer, representative or agent of _____, the party making the forgoing proposal or bid;
- 2) He/She is fully informed respecting the preparation and contents of the attached proposal or bid and all circumstances regarding the same;
- 3) Said proposal or bid is genuine and is not a collusive or sham proposal or bid;
- 4) Neither the said bidder nor any of its officers, partner, owners, agents representatives, employees or parties-in-interest, including this affiant has in any way colluded, conspired, connived or agreed, directly or indirectly, with any other bidder, firm or person to submit a collusive or sham bid or proposal in connection with the Contract for which the attached proposal or bid has been submitted or to refrain from bidding in connection with said Contract, or has in any manner directly or indirectly, sought by firm or person to fix the price or prices in the attached proposal or bid or of any other bidder, or to fix any overhead, profit or cost element of the bid price or this or any other bidder or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against JHC, Inc. or any person interested in the proposed Contract;
- 5) The price or prices quoted in the attached proposals or bid are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of this Bidder or any of its agents, representatives, owners, employees, or parties-in-interest, including this affiant; and
- 6) All statements in said proposal or bid are true.

(Signature)

(Title)

Subscribed and sworn to before me
this _____ day of _____, 20__.

(Notary Public)

My Commission expires: _____

**Certification of Payments
to Influence Federal Transactions**

U.S. Department of Housing and
Urban Development
Office of Public and Indian Housing

Applicant Name

Program/Activity Receiving Federal Grant Funding

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, Disclosure Form to Report Lobbying, in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all sub recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. **Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Title

Signature

Date (mm/dd/yyyy)

Previous edition is obsolete

Form HUD 50071 (01/14)
ref. Handbooks 7417.1, 7475.13, 7485.1, & 7485.3

Appendix 1:

Scope of Work – JHC RPCA for RAD

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.

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.

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.

Detailed 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 – Chalet Terrace (129 units), Reed Manor (294 units) and Shahan Blackstone North (120 units) 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.

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 the XX HOUSING AUTHORITY 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 or MS Word format on a “flash” or “thumbnail” drive or compact disc (CD). 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.

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>.

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 the District of Columbia or 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:

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);

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

This is 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.

This list also 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
Chalet Terrace						MI038000001	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
Shahan Blackstone North						MI038000003	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
REED MANOR						MI038000002	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.

Appendix 2

Relevant City of Jackson Redevelopment Plans

JHC believes the following two City-Wide Initiatives may have bearing on the execution of plans for Capital Improvements/Redevelopment/Re-envision of the 3 properties, in particular the property that is in the Downtown area – Reed Manor.

1. “The City of Jackson, Michigan - Master Plan”.

<http://www.cityofjackson.org/DocumentCenter/View/4560/Jackson-Master-Plan?bid>

2. Excerpts from the “Jackson Anchor Initiative Downtown Master Plan RFP” released in 2019

To Prospective Firms:

The Jackson Anchor Initiative, Jackson, Michigan's private sector effort focused on transforming its downtown; and, in doing so, making the entire community a more vibrant place to live, learn and work, is seeking a qualified consulting firm to provide professional planning, urban design, and public meeting facilitation services in preparation of a Downtown Master Plan.

The successful candidate(s) will be expected to respond to downtown Jackson's current and future planning and development needs. The candidate must provide evidence of a proven track record identifying public and private investment opportunities, demonstrating quality urban design practices, creating master plans, facilitating effective forums for public participation, and developing innovative land use plans.

INTRODUCTION:

The Jackson Anchor Initiative is seeking a qualified professional planning firm or consultant to facilitate a community planning process that culminates in the development of a master plan for downtown Jackson, Michigan. The selected consultant will facilitate the public outreach efforts, develop conceptual elements based on the input received through the public and key stakeholder participation efforts, and prepare recommendations for the downtown master plan.

ABOUT THE COMMUNITY:

Jackson is located 30 miles west of Ann Arbor along 1-94, and 30 miles south of Lansing along US-127. The city serves as the county seat of Jackson County and is the core city of the Jackson Metropolitan Statistical Area (MSA).

ABOUT THE JACKSON ANCHOR INITIATIVE:

The Jackson Anchor Initiative is Jackson, Michigan's private sector effort focused on transforming its downtown; and, in doing so, making the entire community a more vibrant place to live, learn and work.

Eighteen of Jackson's largest employers, including its three institutions of higher education, provide monetary support and serve as the Anchor Initiative's board of directors.

The anchor concept was inspired by Harvard economist Michael Porter challenging a community's "anchors" (the established and imbedded businesses and universities) to collectively take more responsibility for the plight of their urban downtown. Our Anchor Initiative's objective is to take on this challenge to make downtown Jackson a more desirable place to live, learn and work by creating and sustaining a more vibrant core -- downtown Jackson, the physical, social and economic hub of the community.

PROJECT AREA:

Downtown Jackson is centrally located within the City of Jackson and the Jackson MSA. The project area is composed of the downtown core, bounded by Louis Glick Highway on the north, Washington Avenue on the south and Cooper Street on the east; and the downtown medical district area adjacent to the downtown core running east along East Michigan Avenue to Elm Street.

The downtown core is anchored by the corporate headquarters of Consumers Energy, a Fortune 500 electric utility; Henry Ford Allegiance Health's back office operations at One Jackson Square; the Jackson County Tower; and City Hall. The downtown medical district is anchored by Henry Ford Allegiance Health's main hospital and many ancillary medical offices and uses.

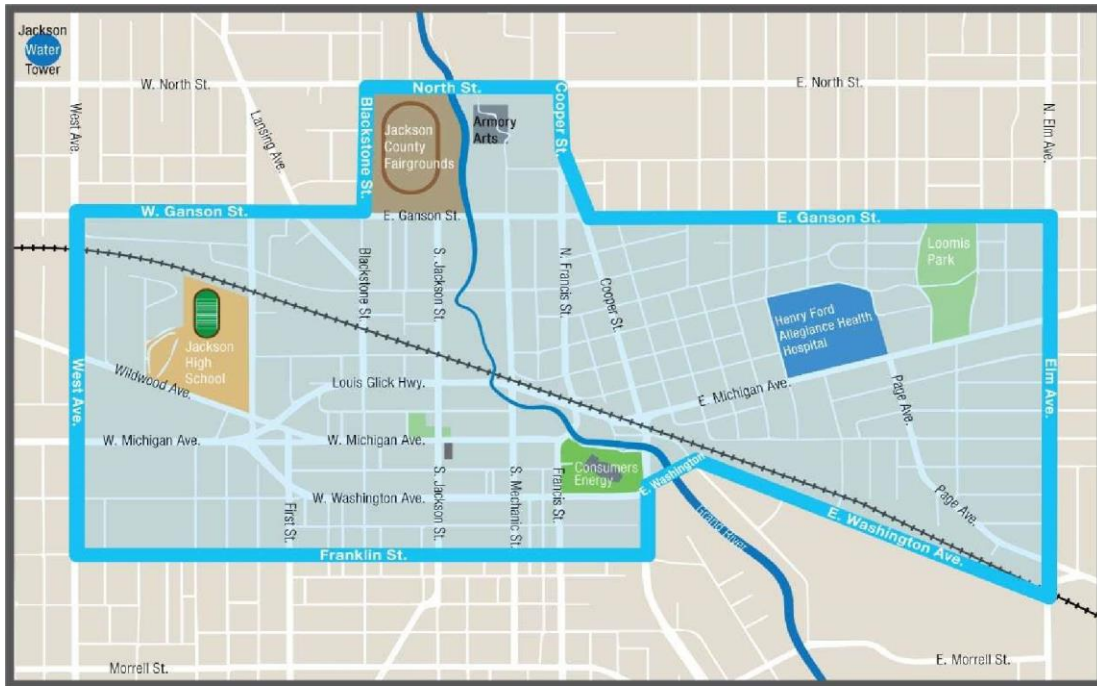
Downtown Jackson has experienced significant investment in the last five years. During that time over \$110,000,000 of investment has occurred downtown with an additional \$150,000,000 of potential investment in the development pipeline.

Significant recent projects include the Michigan Avenue Streetscape, CP Federal City Square, The Lofts on Louis mixed use development, the Lean Rocket Lab and the Consumers Energy Innovation Center.

Several additional projects are currently underway including The 200 mixed use development, the Jackson Culinary Incubator Kitchen, the Jackson School of Arts, and the Francis Street Senior Lofts.

Several residential projects that will augment the existing downtown inventory are on the drawing board or have recently broken ground. The Francis Street Senior Lofts, a 45-unit age and income restricted mixed use project just broke ground and will add to the existing inventory of 195 age and/or income restricted residential units within the downtown core. An additional 126 age and/or income restricted units are currently in the development pipeline.

The 200, an 86-unit market rate mixed use project broke ground in May and will add to the existing inventory of 66 market rate residential units in the downtown core.



Design by City of Jackson

PLAN ELEMENTS:

Although several plans and studies addressing individual components of downtown have been undertaken in recent years an overall downtown master plan has not been one of them and does not exist for downtown Jackson. The Jackson Anchor Initiative is interested in a downtown master plan that will focus on downtown's future with a strong emphasis on street level activation through placemaking and retail development, outdoor recreation specifically activating the Grand River, leveraging arts and cultural assets, single family and multi-family market rate residential development opportunities, and integrating through perception and physical means the downtown medical district into the downtown core.

Key issues facing downtown Jackson:

- Need for a unified vision for downtown
- Physical and perceived disconnect between the downtown core and the downtown medical district
- Potential \$31.9 million in new retail sales not being realized
- Safety / Panhandling
- Parking system management
 - o Availability of short-, medium-, and long-term parking options
 - o Current and future parking inventory

- Wayfinding
- Event management

Previous downtown Jackson studies and plans:

- City of Jackson Anchor Opportunity Analysis, 2013 — U3 Ventures
- Downtown Jackson Alleyway, September 2014 — Michigan Municipal League PlacePlan
- Downtown Jackson Target Market Analysis, October 2014 — LandUse USA
- Jackson Next Community Master Plan, City of Jackson, April 2016 — Beckett & Raeder
- Downtown Retail Market Study, January 2018 — Gibbs Planning Group • Shopability Analysis, May 2018 — Gibbs Planning Group

GENERAL SCOPE OF WORK:

General Scope of Work / Project Deliverables:

- Downtown Master Plan with these Key Components
 - Street Level Activation through Placemaking and Retail Development
 - High Impact / Lower Cost Ideas
 - Example: Alley Activation
- Outdoor Recreation Specifically Activating the Grand River
- Leveraging Arts and Culture Assets
- Integrating Downtown Medical District into Downtown Core
- Market Rate Residential Development Opportunities
- Single Family ■ Multi-Family
- Identify Infill and Redevelopment Opportunities
- Address Impact of City Codes and Standards on Downtown's Revitalization and Make Recommendations for Necessary Adjustments to Further Revitalization
- Zoning
- Design Standards
- Historic Preservation

Meetings and Public Engagement:

The following are general expectations for the meetings and a public engagement process. The selected consultant shall also provide recommendations for this process. The final framework and process will be finalized pending negotiations of the final contract:

- General expectations for meetings and public engagement process are outlined below with additional recommendations provided by the selected consultant:
- Initial kickoff meeting with Jackson Anchor Initiative staff to review the project schedule, tour the downtown, schedule meetings, both internal and public meetings, and finalize plans for data compilation, process for creation of stakeholder committee, focus groups, town hall meetings and other community engagement opportunities.
- Community workshop with downtown master plan technical team comprised of key downtown stakeholders.
- Develop website for information and community engagement including online survey and other engagement tools such as visual preference surveys, interactive GIS, and other virtual engagement tools for citizen participation.
- Community outreach / town hall meetings.