



HOUSING AGENCY

REQUEST FOR PROPOSAL

CAPITAL NEEDS ASSESSMENT (CNA)

FOR AFFORDABLE APARTMENT COMMUNITIES

Contract #24-P-0038

Proposals Due no later than Thursday, August 22, 2024, at 2:00 p.m.

Email digital submissions to: thashagen@homesforgood.org



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Homes for Good is seeking proposals for Capital Needs Assessments regarding eighteen (18) asset properties managed by 3rd party property management companies. The Provider for these assessments must possess valid and current licenses and certifications necessary to comply with the "Statement of Work" listed below and as regulated by all applicable state, county, and/or local laws and ordinances.

The Provider must have prior training and experience in evaluating site and building systems, health and safety conditions, physical and structural conditions, and environmental concerns and have complete knowledge of the current standards, details, and critical dimensioning related to total accessibility for a family and/or senior residential property, as defined by the American with Disabilities Act (ADA), United Federal Accessibility Standards (UFAS) as well as the local jurisdictional codes and requirements related to the specific properties.

BASIC OVERVIEW

RFP Release Date	July 22, 2024
Submission Due Date & Time	August 22, 2024, by 2 PM
Submission Methods	Digital Submission – email thashagen@homesforgood.org
Anticipated Contract Term	2 years from the issuance of the Notice to Proceed. See Section I.
Maximum Number of Contracts Awarded	1
Agency Contact	Teresa Hashagen thashagen@homesforgood.org (541) 852-6044
Subcontracting	Not permitted
Questions Regarding the RFP	Due by August 5, 2024, by 2 PM thashagen@homesforgood.org (541) 852-6044



HOMES FOR GOOD OVERVIEW

WHO WE ARE...

Homes for Good is Lane County's housing agency and our primary work is to help low-income residents secure and maintain affordable housing. At a higher level, we are neighbors united to get every Lane County resident who needs help, into a home.

WHAT WE DO...

- ❖ Rental Assistance Vouchers
- ❖ Help veterans, seniors, and people with disabilities find and secure affordable housing.
- ❖ Match low-income residents with public and assisted housing units.
- ❖ Partner with other community organizations and non-profits to build, finance, and develop affordable housing.
- ❖ Connect residents with self-sufficiency programs and wellness supports.
- ❖ Work with the low-income community to provide help with weatherization improvements that lower utility bills and keep homes more comfortable.
- ❖ Raise awareness about the need for low-income and affordable housing in Lane County.

AFFORDABLE HOUSING ADVOCATES...

We work to raise awareness about the need for – and lack of – affordable housing here in Lane County and more broadly. There is no question that the need for affordable housing will only grow as our population increases and high demand for housing pushes rents and prices up. We believe every person should have a home and that we must proactively and aggressively work toward that goal for the good of our community, state, and nation.

DIVERSITY EQUITY AND INCLUSION

Our goal is to address racial disparities within our organization in our hiring and promotion practices, greater opportunities in contracting, and equitable services available to the people we serve. We want to establish Equity as part of our DNA as an organization.



I. PROJECT BACKGROUND

Perform a Capital Needs Assessment (CNA) as generally outlined in Section II Scope of Services. Please refer to the table below for dwelling information. Assessments are to be completed over a period of two (2) years with priority designation/property assignment to be determined by the Asset Manager.

Property Name	Address	City	Zip Code	# of units	Property Manager
Family Shelter House	969 Hwy 99	Eugene	97402	28	ShelterCare
Heeran Center	2222 Coburg Road	Eugene	97401	16	Pinehurst
Signpost House	975 W 7th Avenue	Eugene	97402	16	ShelterCare
Camas Apartments	420 South 2nd Street	Creswell	97426	36	Quantum
Munsel Park	2021 E 12th Ave	Florence	97439	44	Quantum
Norsemen Village	920 W 1st Street	Junction City	97448	44	Quantum
Hawthorn at 29th Place	2984 Oak Street	Eugene	97405	35	Quantum
Jacob's Lane	3450 Jacob's Lane	Eugene	97402	63	Pinehurst
Laurel Gardens	1775 W 12th Ave	Eugene	97402	41	Quantum
New Winds	750 Laurel St	Florence	97439	18	Quantum
Richardson Bridge	1210 Acorn Park	Eugene	97402	32	Quantum
Sheldon Village	2475 Sheldon Village Loop	Eugene	97401	78	Pinehurst
Turtle Creek	975 Hatton Avenue	Eugene	97404	27	Pinehurst
Walnut Park	975 Hatton Avenue	Eugene	97404	32	Pinehurst
Willakenzie Townhouses	3200 Willakenzie Dr	Eugene	97401	25	Pinehurst
Bascom 2 Village	3077 Matt Drive	Eugene	97408	48	Quantum
The Oaks at 14th Market District	1424 Oak Patch Rd	Eugene	97402	54	Quantum
Commons*	560 Oak Street	Eugene	97401	50	Quantum

*to be done in year two of contract period



II. SCOPE OF SERVICES

A Capital Needs Assessment is a systematic assessment to determine a property's capital needs over the next 20 years based upon the observed current physical conditions of a property. The CNA report provides a year-by-year estimate of capital replacement costs over this 20-year period for use by the property owner and other related management personnel in planning the reserve account for replacements and other funding to cover the anticipated costs.

The CNA is based on the expected useful life in relation to the remaining useful life of all components that make up the properties' basic needs. These components are separated into four main categories. The categories are **Site, Building Exteriors, Building Systems, Commons Areas, and Units**, which shows the expenditures for each year of the next twenty-year term, including the inflation values.

Site Includes all parking lots, sidewalks, and other hardscapes, exterior furnishings (benches, mailboxes, flag poles, etc.), and landscaping (including trees, irrigation, fences, trash enclosures, etc.). This category assesses all egress/ADA pathways and ADA parking for compliance. Any site life/safety items of note should be assessed in this section.

Architectural Includes all exterior building components such as siding, roofing, windows, doors, building light fixtures, and entries. This category also assesses the project accessibility and all compliance/non-compliance with the current ADA requirements. All common interior areas of the building, including the common laundries, kitchens, bathrooms, and all other areas open to the tenants. This includes common corridors and stairwells. All life/safety items of note should be noted.

Mechanical/Electrical Includes power distribution, shared hot water tanks, furnaces, boilers, elevators, entry systems, general fire alarm systems, corridor air systems, and all other common area serving equipment.

Dwelling Units Includes all furnishings within the unit. All items for assessment shall include, at a minimum, flooring, wall conditions, doors, hardware, trim, cabinets, sinks, toilets, tubs/showers, faucets, countertops, light fixtures, receptacles, hot water tanks, fire alarm devices, heaters, bathroom hardware, appliances, bath fans, kitchen exhaust, laundry vents, and closets/closet doors. At least 50% of all units shall be inspected and 100% of the common areas. All ADA units on the property shall be inspected and assessed for complete compliance to ADA and UFAS standards.



III. STATEMENT OF WORK

The CNA provider shall provide a complete outline of the property including, but not limited to, all of the following criteria:

1. Site

- Status of the paving, sidewalks, accessible paths to common areas, curbs, and other hardscapes.
- Drainage of the hard surfaces, landscapes, and building perimeters.
- Condition of life and safety issues such as handrails, uneven walking surfaces, pedestrian warnings, electrical and mechanical services, etc.
- Trash enclosures, mailboxes, playground equipment and play area, site lighting, and other common areas.
- Landscaping and grading issues.
- Any/all life /safety issues.

2. Building Exteriors

- Building cladding including the status/installation of the flashings, sealants, trim, corners, abutment to other surfaces, and overall existing performance.
- Windows and doors. Assess the condition and performance.
- All penetrations such as mechanical vents, fixture mounts, Cable TV and satellite TV mounts, and utility entry points.
- Roofing and gutters (including downspouts and scuppers). Determine the condition along with the installation and the current performance.
- Condition and code-related issues for stairways, decks, and deck rails.

3. Building Systems

- Common area and unit heat and ventilation.
- Domestic water source and water heating source
- Electrical service and distribution.
- Fire Alarm systems.
- General lighting and illumination at the interior and exterior.

4. Common Areas

- Accessibility to all common areas. Include any life/safety concerns.
- Condition of walls and ceiling substrates, doors, flooring, and trim.
- Egress and general pathways.
- Security to the building(s).
- Laundry services.
- Stairs, ramps, and railing systems.



5. Units

- Flooring including condition, transition strips, baseboards, and other related items.
- Bathrooms including plumbing fixtures, GFCI outlets, exhaust fans, bath hardware, and cabinets.
- Wall and ceiling substrates.
- Doors, hardware, and millwork.
- Window coverings.
- Kitchen including cabinets, countertops, sink/faucet, appliances, range hood exhaust, and GFCI outlets.
- Light fixtures, baseboard and wall-mounted heaters, unit electrical panels, and wall receptacles.
- Water Heater tanks.
- Smoke/fire and CO detectors.

An interview should be conducted with the site management during the assessment to discuss all current issues needing immediate attention, typical tenant issues related to the building elements, mold issues, water intrusion issues, etc. In addition, the site management will need to provide any documentation, plans, recent citations, and any other related information to the selected provider for use in analyzing the property needs.

The CNA will collect information for standard component replacement or refurbishment and record immediate needs as well as the needs distributed over a 20-year term, expressed in terms of dollars required to meet the needs. The report will include a schedule of annual demands on a reserve for renewal as well as the annual funding amount required given the starting reserves and the projected annual demands.

IV. DELIVERABLES

A minimum of two (2) hard copies of each report must be included as well as one (1) electronic copy submitted in MS Excel format on a USB drive.

A detailed narrative description of the property is required to assist in the description of all line items shown in the category spreadsheets. The narrative should include the year the property was constructed, fully describe any former rehabilitation to the property, additional information and descriptions related to all components of the five main categories (above), a full assessment of the property's current and needed accessibility issues and any recommendations from the Provider on current and/or future issues caused by existing conditions.

A spreadsheet (Executive Summary) showing the needs over a 20-year term will be provided at the completion of the property assessment. This will show reserve costs needed for each year of the 20-year term including inflation for the term along with individual line-item assessments as defined above.

For each asset management property assessed provide 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.



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

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.

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)

Prioritize each work item. There should be at least five (5) categories.



Submission Requirements

Your response to the Request for Proposal must contain all the information requested along with acknowledgment of all attachments. A completeness check will be conducted for each submission. Incomplete submissions will not be accepted. Submissions should include the items organized and numbered to correspond to each requirement below:

General

Proposals will be clear and concise. Homes for Good encourages green options and requests that the submission of your response be in digital format. Submissions can be emailed to thashagen@homesforgood.org. If the file size is too large to email, please submit your proposal on a thumb drive. Thumb drive submissions must be received in a sealed envelope that denotes the RFP number and company name. These will need to be dropped off in the bid box in the lobby basement at our service center, located at 100 W. 13th Avenue, Eugene, Oregon no later than August 22, 2024 by 2 PM.

A. Cover Letter

All proposals must be accompanied by a cover letter signed by an individual who is legally authorized to enter into a contract on behalf of the proposing individual/firm. The letter must designate the Proposer's contact person during the proposal review process. Also, include a statement that the submission is a firm offer for a 90-day period.

B. References & Sample Work

Provided a minimum of three (3) references. Can be current or past clients, including Public Housing Authorities and/or public entities for which your firm has performed similar services to this RFP.

- Include the client firm or company name
- The name of the firm's contact person
- Client's telephone number
- Brief description of services performed and the approximate date they were performed.
- Submit a sample CNA from another apartment community your firm performed a CNA on.

C. Qualifications

Include a detailed statement of qualifications for the organization. This should include organizational history, clients presently served, and capacity to complete the scope at all sites listed in Section I: Project Background. Please include resumes for all key staff to be involved in this project. The following qualifications must be met and should be highlighted for key individuals on the project:

- 5 years or more of direct experience in physical facility inspection and/or assessment.
- 5 years or more of direct experience in cost estimating.
- Knowledge of applicable building standards and codes, including Federal, State, and Local requirements as demonstrated by experience, training, or certifications.



- Knowledge of construction practices, as demonstrated by experience, training, or certifications.
- Working knowledge of commonly used computer technology and software.

D. Approach

The proposal should set forth a work plan and methodology for completing the requested services.

E. Fee Proposal

Provide costs for capital needs assessments and related work as described in Section II: Scope of Services as an all-inclusive maximum rate as well as a breakdown listing hourly rate for assessment services and estimated hours per complex.

F. Diversity, Equity, and Inclusion (DEI)

The proposal should include the firm's DEI strategies. This section will be evaluated on firm's commitment to engaging diverse populations particularly those facing disparities. Maximum score will be given to firm's that have formally adopted Diversity, Equity, and Inclusion strategies and MWESB strategies. The following information should include:

- ❖ Describe your firm's DEI strategies to removing barriers and creating opportunities for populations facing disparities in order to maximize workforce diversity.
- ❖ Describe your firm's plan for maximizing Minority and Women Owned, and Emerging Small Businesses (MWESB) participation and/or Section 3 participation.
- ❖ Homes for Good is striving for a 20% MWESB contractor/vendor utilization rate on the proposed project. Please describe your firm's MWESB and/or Section 3 utilization rate on recent projects and if you have worked on projects with preferred MWESB target rates.



Expectations & Timeline

Additional Work

During the awarded contract period, Homes for Good may request additional work and the Contractor will be asked to provide a cost for that work. This Agency may or may not authorize such additional work to the awarded contractor and reserves the right to use another Contractor.

Insurance Coverage Requirements

At the signing of the contract, the awarded Contractor is required to provide the Agency with Certificates of Insurance showing the following Insurance is in force and will insure all operations under this contract. Contractors shall not cancel, materially change, or fail to renew insurance coverages during the period of this contract. Any insurance bearing any adequacy of performance shall be maintained after completion of the contract for the full warranty/guarantee period.

Nothing contained in the insurance requirements is to be construed as limiting the extent of the Contractor's responsibility for payment of damages resulting from the Contractor's operation under a contract with Homes for Good.

General Contractor's General Liability

- ❖ **Workers' Compensation:** In accordance with State Law, the general Contractor, its subcontractor, and all employers working under the contract are subject employers under the Oregon Workers' Compensation Law and shall comply with ORS 656.017, or otherwise be exempt under ORS 656.126.
- ❖ **Automobile Liability:** For owned and non-owned motor vehicles used on the site or in connections therewith for a combined single limit for bodily injury and property damage of not less than \$500,000 per occurrence.
- ❖ **Commercial General Liability & Professional Liability:** The minimum limit of liability shall be \$1,000,000 per occurrence written, with a combined single limit for bodily injury and property damage.

The General Contractor's General Liability policy shall name the Agency as Additional Insured for this project, with an attached Endorsement Page, showing the additional insured as:

[Homes for Good Housing Agency
100 West 13th Avenue
Eugene, OR 97401]

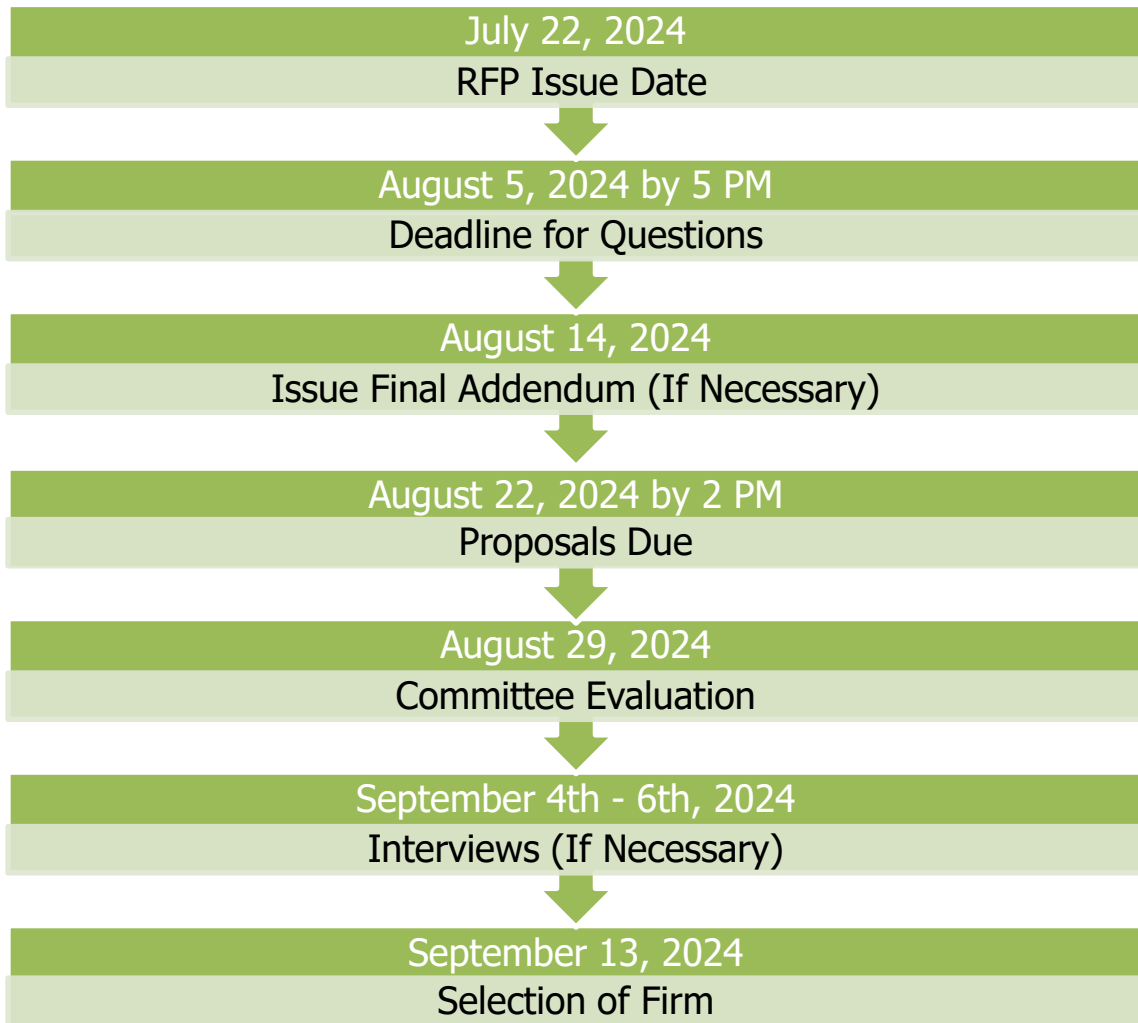
Payment

Agency will review Contractor's invoice and within ten (10) days of receipt notify Contractor in writing if there is a disagreement or dispute. If there are no such disputes, Agency shall pay the invoice amount in full within (30) days of invoice send date.



TARGET TIMELINE:

Prospective proposers may contact Teresa Hashagen by email at thashagen@homesforgood.org for further information regarding this process or to request clarification. Follow-up questions and/or clarifications may continue to be submitted in this fashion until Monday, August 5, 2024, by 5 PM.





Evaluation & Selection Criteria

A committee comprised of representatives from Homes for Good will review the proposals for conformity with the requirements of the Request for proposals described above. Conforming proposals will be evaluated according to the evaluation criteria.

First, the proposals will be examined to determine whether the organization satisfies the mandatory elements identified below. Next, the committee will use the selection criteria to score each proposal. Based on the strengths of the proposals received, the committee may elect to identify finalists and schedule appointments for presentations and/or interviews. Following the presentations and/or interviews if any, the committee will make a final selection based on the best overall interests of Homes for Good. The committee will rely on information provided in the proposals and during interviews if any, as well as information provided by references.

Evaluation Criteria

Proposals will be evaluated using two sets of criteria. Firms meeting the mandatory criteria will have their proposals evaluated and scored. The following represents the criteria that will be considered during the evaluation process. Total points will be awarded to the low bid. Points to be deducted by distance from the low bid. Full points will be awarded to bidders who include full information.

OBJECTIVE CRITERIA	POSSIBLE POINTS
Cost	20
DEI Strategies	10
Completeness of RFP	20
SUBJECTIVE CRITERIA	POSSIBLE POINTS
Understanding of work to be performed and ability to manage work	20
The qualifications of the organization	15
References & Sample of Work	15
TOTAL	100

Each Proposal will be in digital format and be a signed submission. If emailing, please put the following in the subject line: **“Capital Needs Assessments for Affordable Apartment Communities – Contract #24-P-0038”**. If the file size is too large to email, please submit your proposal on a thumb drive. Thumb drive submissions must be received in a sealed envelope that denotes the RFP number and company name. These will need to be dropped off in the grey bid box in the lobby basement at our service center, located at 100 W. 13th Avenue, Eugene, Oregon no later than August 22, 2024, by 2 PM.