



REQUEST FOR PROPOSALS

June 8, 2020

**Brookstone Apartments Rehabilitation
Loveland, Colorado**

**CONSTRUCTION MANAGEMENT/GENERAL
CONTRACTING SERVICES**

**DUE DATE:
12:00 Noon
Tuesday, June 23, 2020**



**Notification
Construction Manager/General Contractor
Brookstone Apartments Rehabilitation**

The Loveland Housing Authority (LHA) is accepting Proposals from qualified Construction Manager/General Contractor (CM/GC) firms to assist with the design and construction of an extensive rehabilitation of a 72-unit family apartment development in Loveland, Colorado. Those firms interested in submitting a Proposal to provide preconstruction, cost estimating, construction management and general contractor services must respond to a Request for Proposals (RFP).

Copies of the RFP are available on the Housing Authority's website at www.lovelandhousing.org, or by contacting the Director of Real Estate Development via email:

Darcy McClure
Director of Real Estate Development
Loveland Housing Authority
dmcclure@lovelandhousing.org
970-412-2400

All responses to the RFP must be submitted to the Loveland Housing Authority no later than 12:00 NOON, Tuesday, June 23, 2020. There will not be a formal bid opening.

No Pre-Proposal Conference is scheduled, although Bidders are encouraged to visit the project site. Deadline for submitting questions related to the RFP is 5:00 p.m., Wednesday, June 17, 2020. A written addendum will be issued and posted to the LHA website to answer questions for all Bidders, if needed.

After review of the Proposals, up to three (3) CM/GC firms will be invited to participate in formal interviews. "Virtual" remote interviews shall be conducted by the LHA Development Team and LHA Board members. After the interviews, the Board of Commissioners of the Loveland Housing Authority shall make an award to the most qualified firm and shall not be bound by the lowest service fee proposed. The Board of Commissioners may waive any irregularities and improprieties related to this offer as determined to be in the best interest of the Loveland Housing Authority.



Brookstone Apartments Rehabilitation
Request for Proposal
Construction Management/General Contractor

GENERAL

The Loveland Housing Authority (LHA) is seeking a qualified Construction Manager/General Contractor to assist LHA with the design and construction of an extensive rehabilitation of an existing 72-unit, 2-story family rental housing development, designed to serve moderate and low income households. LHA will serve as the Developer for the Project and will manage and maintain the facility upon completion.

PROPERTY IDENTIFICATION

The existing site is an approximate 7.75-acre parcel of land located in east Loveland at 2575 E. 1st Street. The proposed rehabilitation is consistent with the property's PUD zoning district (Pine Tree Village PUD), and no planning or land use approvals are anticipated beyond building permits. A site plan is included in the Appendix to this RFP.

The existing Brookstone Apartments development includes 72 units in 9 residential buildings in 2-story, 8-plex configurations built in a through-breezeway style, plus a single-story clubhouse building. The original construction was completed in two phases in 2000 and 2002. Unit mix is 48 2-BR/2-Bath and 24 3-BR/2-Bath units, and this mix will not change in the rehabilitation. Two Type A fully accessible units are included in the 72, with all remaining ground floor units initially designed and substantially constructed as Type B adaptable units. The site includes approximately 161 surface parking spaces, including 17 handicapped accessible spaces. Common amenities include a playground and other passive activity areas.

PROJECT DEFINITION

The intent of the LHA is to rehabilitate the existing 72-unit rental housing development to continue to meet the needs of income-qualified families, whose incomes range between 40% and 50% of the Area Median Income (AMI). The Project will be funded through the federally-sponsored 4% Low Income Housing Tax Credit (LIHTC) Program. Additional funding will be provided through a combination of City of Loveland fee waivers and other considerations, Federal and State grants, a long term commercial mortgage, and LHA equity.

The Scope of Work for the rehabilitation will include recommendations outlined in the Capital Needs Assessment (CNA) prepared by Partner Engineering and Science Inc., dated June 7, 2019. The Scope of Work described in the assessment is not all-encompassing. The selected General Contractor and Architect will work with LHA to develop a comprehensive and prioritized Scope of Work.

The planned Scope of Work includes both exterior building and interior unit rehabilitation work,

as well as site work and landscaping improvements. It is intended that both the selected Architect and CM/GC shall assist the LHA in evaluating and prioritizing the Scope of Work items included in the CNA, and make adjustments to the scope as appropriate. The CNA is attached in the Appendix of this RFP. (The CNA will be updated as a part of this Project, but by a separate third party contracted for by the LHA.)

PROJECT DESIGN CHARACTERISTICS AND GOALS

Any exterior design improvements that are part of the rehabilitation design shall continue to complement the existing neighborhood and surrounding developments. The Loveland Housing Authority has established a legacy of encouraging creative design and innovation in construction in its development work. In support of this legacy, the LHA has established the following design goals for this Project:

1. Create an empowering and livable environment in both the exterior and interior spaces of the building, supporting the independent living of its residents;
2. Create an award winning architectural design solution;
3. Encourage innovation and cost-effective construction techniques and systems; and
4. Initiate and maintain a construction schedule and process that is as least disruptive to the development's current residents and visitors as possible.

DESIGN AND CONSTRUCTION STANDARDS

The LHA has developed Design and Construction Standards to guide the Architect, design team, CM/GC and all subcontractors in the design and construction of our development projects. The Standards manual will be provided to the successful Architect and CM/GC upon contract award. It is the expectation of the LHA that these Standards will be complied with, unless specific variance request(s) are submitted to LHA in writing and approved.

DESIGN TEAM

A separate Request for Proposal has been issued for the selection of an Architect-led Design Team to complete the full design and construction documents for building permit approval, and to provide construction administration services for the Project. The selected Architectural Firm will be responsible for providing all necessary consultants and subconsultants as needed for the proposed Scope of Work, including structural, mechanical/plumbing and electrical engineering, landscape architecture, site irrigation design and EGC/energy consulting.

This Request for Proposal is being offered for the selection of a Construction Manager/ General Contractor for the Project, with the intent that this firm will be contracted and available to provide pre-construction and cost estimating services through the design phases of the Project. The selected Architect and Design Team will be expected to coordinate the completion of their architectural and engineering designs and construction documents with the input of this CM/GC.

PROJECT TIMING

The LHA intends to submit an application for 4% Low Income Housing Tax Credits by November 1, 2020. Scope confirmation and Schematic Design will be completed prior to this deadline, with preparation of full construction documents underway. The design schedule will allow for adequate time for preparation of the required cost estimate prior to the LIHTC application.

For the Bidders information, the LIHTC application requires the following:

1. Site Control – The site must be owned by the Housing Authority, or the Authority must demonstrate through a real estate contract that it has the ability to “close” on the property following approval of the tax credit application. The Housing Authority has full ownership of the property;
2. Site Plan – the Architect must provide a site plan showing the location of the buildings, landscaping, parking, and site amenities;
3. Schematic Drawings – the Architect must provide overall building and unit floor plans for each building, as well as building elevations, and general exterior finish definition must also be provided;
4. Enterprise Green Communities Checklist – The tax credit allocation program in the State of Colorado adheres to the Enterprise Green Communities (EGC) Criteria, governing energy saving and conservation components which must be incorporated into the building design. As part of the initial application process, the Architect, working with the Housing Authority, must identify those energy saving/conservation components and document the intent of the design to incorporate those features;
5. Construction Manager/General Contractor Estimate – an independent CM/GC must take the Schematic Drawings and Site Plan and prepare a preliminary estimate for all construction costs anticipated, provided in the CHFA-approved format.

It is anticipated that the tax credit approval process may take approximately 90 days. Should the Project not be approved upon the initial application, a new application may be submitted in 2021, on a schedule to be determined by the Colorado Housing and Finance Authority (CHFA). This application would require the same information and an additional 90-day period for review.

Regardless of the timing of funding, the intent of the LHA is to commission immediately for all professional services described for the Project to be completed by the LIHTC application date.

Construction phase services should anticipate that the Project will be constructed in one (1) construction phase, and with units released to the Owner for occupancy on a staggered basis by building.

FOLLOWING TAX CREDIT APPLICATION APPROVAL

Immediately following approval of the tax credit application by CHFA, the intent is to move as quickly as possible into the rehabilitation construction. It is the intent that the construction documents will be submitted for plan review and building permit approval during this period.

ENTERPRISE GREEN COMMUNITES

It is a requirement of the Project that the most current Enterprise Green Communities (EGC) design criteria be met. Beyond the EGC required criteria, it is also the desire of the LHA to adopt as many sustainable design elements as is economically feasible. Where possible, sustainable design elements are expected to be incorporated and/or designed for retrofit installation after construction is complete.

The Construction Manager/General Contractor plays a critical role in ensuring those criteria are met during the construction period. The selected CM/GC shall provide evidence of their working knowledge of those criteria, and must ensure that standard is maintained throughout

construction. It is critical that the CM/GC consider the EGC reporting requirements and implementation criteria when scoping their role in this Project.

DAVIS-BACON

The Project may be required to comply with applicable Housing and Urban Development (HUD) requirements mandating Davis-Bacon Wages. The CM/GC must provide evidence of their working knowledge related to those requirements, and must ensure during the construction phase that all employees working on the job site are paid the prevailing Davis-Bacon Wage Rates for the trade categories to be used. The CM/GC must adhere to all reporting requirements and provide the Owner with all supporting documentation.

SECTION 3 REPORTING

Because the project will utilize federal funding, the CM/GC will be required to implement an aggressive program that will target low income, minorities and women opportunities. The CM/GC should become familiar with Economic Development Requirements of HUD 24 CFR 135, Section 3, and will be expected to implement and document prior to, and during construction, the results of those recruiting efforts.

CONTACT INFORMATION

It is the intent of the LHA Development Team to maintain the integrity and fairness of the Request for Proposal process. Therefore, please direct any questions and limit any communications regarding this RFP to:

Darcy McClure
Director of Real Estate Development
Loveland Housing Authority
375 W 37th Street, Suite 200
Loveland, CO 80538
970-412-2400
dmcclure@lovelandhousing.org

DISCLAIMER

The Loveland Housing Authority reserves the right to reject any and all responses to this offering on the basis of being nonresponsive or for failure to disclose requested information. The Housing Authority reserves the right to waive any irregularities associated with the offering, the responses to the offering, the selection process, or any related processes. The Board of Commissioners of the Loveland Housing Authority shall have the right to make a final selection based on any factors it deems to be in the best interest of the Housing Authority, and shall not be bound to any conditions or requirements defined in this offering. The decision of the Board of Commissioners shall be final.



**Brookstone Apartments Rehabilitation
Request for Proposal
Construction Management/General Contractor**

SCOPE OF SERVICES

CM/GC and DESIGN TEAM

The intent of integrating a Construction Manager/General Contractor into the Design Team is to provide the Architect, Design Team and Owner with fair and accurate information concerning the construction of the Project. That information will primarily be related to: (1) the feasibility of implementing and constructing the proposed rehabilitation Scope of Work, and (2) a reasonable estimate of the costs associated with the design alternatives being considered. It is expected the CM/GC will incorporate a sufficient number of experienced materials suppliers and/or subcontractors to provide the type and quality of information requested of the CM/GC by the LHA.

It is anticipated that the Design Team will facilitate at least one (1) half-day design charrette with the LHA to determine the design characteristics of the Project. Additional design meetings may be required to focus on specific areas of the design, including but not limited to, mechanical/plumbing and electrical systems improvements, EGC compliance/energy modeling, and infrastructure/landscaping improvements. The CM/GC will be required to participate in all of these sessions as required to offer expertise and input into the final design selections.

PRE-CONSTRUCTION & GENERAL DESIGN SUPPORT SERVICES

As a member of the Design Team the CM/GC will, in general:

1. Provide knowledge and information of generally accepted construction practices sufficient to help the Architect and Design Team determine the feasibility of pursuing various design solutions.
2. Provide the Architect and Design Team with opinions and options related to the "means and methods" which may be utilized when constructing various design solutions.
3. Provide the Architect and Design Team with product, material and systems supplier or subcontractor options, materials or systems availability and substitution options, performance and warranty options, pricing options, installation options, and potential EGC compliance concerning various recommended design solutions.
4. Provide the Architect and Design Team with knowledge, experience and examples of

products or systems used in similar projects, including fabrication, delivery and site installation processes, long-term performance, warranty issues and anticipated maintenance requirements.

5. Provide the Architect and Design Team with knowledge, experience and a pros/cons analysis of previously completed “integrated design” processes and energy efficient, sustainable multi-family housing rehabilitation projects.
6. Provide the Architect and Design Team, as requested, with estimated construction pricing of the Project, including comparisons of alternative materials, systems or components of the Project, in a timely manner.
7. Participate, as required, with members of the Architect and Design Team in any meetings required to discuss, promote or secure approvals for any portion of the Project with outside entities, including but not be limited to, the LHA Development Team, LHA Board of Commissioners, the City of Loveland Planning and Building Departments, various material and product suppliers or subcontractors, and tax credit investors and/or funding agencies.

DESIGN and CONSTRUCTION DOCUMENTS PHASES

Specific to these design phases, the CM/GC shall monitor and review each component of the Architect and Design Team’s design and construction drawings and technical specifications to confirm compliance with the design parameters and budget for the Project, identify conflicting issues, cost effective construction methodologies and material selection alternatives.

As a part of these design phases, the CM/GC will provide LHA with thorough and complete construction cost estimates at 70% and 95% completion of the construction documents. Costs shall include all divisions of work identified in the construction drawings and technical specifications, including Division 1 general requirements. The 70% cost estimate may include allowances for portions of the work that are not fully defined or where adequate estimates cannot be acquired from suppliers or subcontractors. However, the 95% cost estimate shall be fully based on estimates provided by applicable suppliers and subcontractors; no allowances shall be allowed at this stage of estimating.

CONSTRUCTION MANAGEMENT DURING FINANCING APPROVAL

Once the Design Team has finished their work, the Construction Manager/General Contractor will be required to provide information to the financial institutions during their due diligence period working through the requirements of the Low Income Housing Tax Credits. The CM/GC will need to be available and cooperative as that process unfolds, including the ability to provide a final construction budget and construction contracts. In addition, the CM/GC must be able and willing to provide company financial disclosures and other due diligence required by our investor/partner, related to the competitive and financial strength of the company.

The Architect and Design Team will work as expeditiously as possible to prepare final construction documents during this time period, but the CM/GC must be capable of responding in a timely manner with final construction costs and other due diligence information that may be required by the financial institutions.

CONSTRUCTION MANAGEMENT DURING REHABILITATION CONSTRUCTION

The Construction Manager/General Contractor shall be responsible for all means, methods, inspections, certifications, and reports required to construct the rehabilitation Scope of Work,

including but not limited to:

1. Complete and submit permit applications, file construction documents, and acquire all necessary permits required for construction by any governmental agency having jurisdiction over the Project, including but not limited to, building permits, drainage permits, erosion control permits, wetlands permit, and any special energy resources permits.
2. Propose at least three (3) qualified suppliers or subcontractors in each trade or division of work required by the Project, in compliance with the construction documents provided by the Architect and Design Team, and review with the Owner for approval. Solicit and secure supplier and subcontractor bids from this approved list, compile bids into a spreadsheet and review with the Owner. Provide the Owner with copies of all bids received from each supplier and subcontractor.

For work that the CM/GC would propose to complete with their own in-house workers or craftsmen, the CM/GC shall provide bids for this work for comparison with outside subcontractors.

Upon approval of individual bids, initiate final contracts consistent with the approved construction budget. Review sample subcontractor contract language with the Owner prior to issuing. Provide the Owner with copies of all signed contracts with subcontractors and material suppliers prior to the start of construction.

3. Maintain an accurate record of all construction activities sufficient to meet the reporting requirements required, including but not limited to, HUD Section 3 low income employment, Davis-Bacon Wage and Hour Reporting (if determined to be applicable), federal or state erosion control/drainage, OSHA, Enterprise Green Communities, the Owner, and any financial institution participating in the Project.

In addition to specific reporting requirements, the CM/GC shall maintain accurate daily records of site activities, including daily accounting of the subcontractors working on site, the numbers and types of workers on site, deliveries of materials to the site, and daily weather conditions on site.

4. Provide the Owner, Design Team and all related parties with a comprehensive construction schedule prior to the start of construction, with weekly updates and status reports during the full construction period. Schedules shall be generated using the CM/GC's in-house electronic scheduling and project management "critical path" software.
5. Assist the LHA to develop a resident relocation plan, in coordination with the proposed construction schedule, with the intent to allow construction on eight units within one 8-plex building at a time. LHA intends to have one of the nine 8-plex buildings vacant and available for rehabilitation immediately after construction start. Once rehabilitation construction is completed in this building, the LHA will relocate residents from another 8-plex to the completed building, and follow this schedule until completion.

LHA will provide the required notice to tenants for vacation of units, and coordinate the moving of tenants and their furniture and other personal belongings to vacant units (or other accommodations), upon completion of "punch list" inspections and follow-up

work. LHA will be responsible for all notices and communications with residents for this process. The CM/GC will not be responsible to coordinate or assist with tenant relocation other than the development of the relocation plan.

6. Initiate, coordinate and execute any required inspections of any governmental agency having jurisdiction over the Project during the construction period, including but not limited to, the City of Loveland, Loveland Fire and Rescue, State of Colorado and Larimer County Health Department (if applicable).
7. Conduct weekly Owner/Architect/Contractor (O/A/C) meetings for the duration of the construction period, providing status information on the Project and assigning responsibility for follow-up on specific action items. Responsibilities include preparation of O/A/C meeting agendas, maintaining an action item log of "open" items, and distribution of O/A/C meeting minutes within three (3) days of the meeting.
8. Provide all documentation required related to the evaluation of any CM/GC, Owner or Design Team generated change proposal, material or product substitution request, change orders, value engineering items, or other adjustments in the scope, budget or construction schedule for the Project during the construction period.

Documentation shall include the CM/GC's evaluation of the proposed change in the scope of the Project, with any required or requested back-up data, and evaluation of the proposed change against the project budget, EGC/sustainability goals, construction schedule, alternatives to the proposed change, or other criteria specified by the Architect or Owner.

9. Plan, manage and provide direct site supervision for all material and product deliveries to the site, and on-site storage and security of such materials.
10. Plan, manage and maintain site records for all recycling, waste diversion and trash removal activities, consistent with EGC criteria.
11. Provide at least one (1) full time Site Superintendent to plan, manage and provide direct site supervision related to all on-site construction activities. The Superintendent shall be present on site whenever subcontractors are working at the site.
12. Secure all required final inspections, temporary and final Certificates of Occupancy, and any other required approvals or certifications from any governmental agency having jurisdiction over the Project, in order to allow the Owner to reoccupy all structures within the time limits established in the approved construction schedule.
13. Document field changes, additions or deletions on a "record" set of construction drawings and specifications, and provide to the Architect at the completion of construction.
14. Coordinate with subcontractors or materials suppliers as required during the warranty period of the Project.



**Brookstone Apartments Rehabilitation
Request for Proposal
Construction Management/General Contractor**

INSTRUCTIONS for DETERMINING PROFESSIONAL FEES

The Loveland Housing Authority will be making its final decision concerning the selection of a Construction Manager/General Contractor based on a variety of factors, including their proposed professional fees and cost proposal. These fees will be fixed as presented to the LHA Development Team and will ultimately be incorporated into the final AIA-A101 Owner-Contractor Agreement and the A703 Schedule of Values.

The bidder should review the format required for this Request for Proposal, but in general the following elements shall comprise the professional fee structure:

1. Construction Management Fee for Pre-Construction & Design Support.
2. General Contractor's Profit/Fee.
3. Project's General Conditions during Construction.

CONSTRUCTION MANAGEMENT FEE shall include all costs associated with the contractor's participation in the Pre-Construction and design support phases of the Project, including staff time, travel time, meeting time, ancillary costs, and any third party consulting costs required to provide expertise or estimating. This fee must be stated as a fixed dollar amount. The interview committee will not accept a percentage fee for this category.

GENERAL CONTRACTOR'S OVERHEAD and PROFIT FEE shall include the contractor's allocated corporate overhead and the contractor's profit for the Project. Additionally, this fee shall include any costs the General Contractor believes they will incur bidding out the final set of construction documents to suppliers and subcontractors, negotiating subcontractor agreements, providing due diligence related to subcontractor selection, and any other costs they may incur between the completion of the design phases and the start of construction. The interview committee would prefer this to be a fixed price amount but would consider this fee being stated as a percentage of the total project cost. If stated as a percentage of the total project cost, that amount would be fixed upon approval of the final Construction Budget.

GENERAL CONDITIONS during CONSTRUCTION shall include all full or part time staff that will be assigned for the duration of the Project and contractor's direct project expenses for temporary office and/or storage trailers, utilities, fuel and temporary power, general liability insurance, builder's risk insurance, vehicle expense, rental equipment, safety equipment, first aid supplies, copies and printing, small tools, telephones, faxes, computers, and other miscellaneous items directly related to supporting the management and construction of the Project to completion. Any

directly related miscellaneous costs the General Contractor believes they may incur in preparing for construction, such as computer modeling, coordination meetings, or constructability reviews should be included in this fee. This fee must be stated as a fixed dollar amount. The interview committee will not accept a percentage fee for this category.

COST EXCLUSIONS

LHA will contract separately for the required Phase I Environmental Report and the Environmental Sensitive Areas Report (ESAR), if applicable, required for the LIHTC submittal process. LHA will also contract separately for geotechnical soils testing and soils reports (if needed), marketing studies, and any other studies required by funding partners or governmental agencies not already completed. LHA will also be responsible for all City of Loveland and State of Colorado plan review fees, development fees and building permit fees.

ESTIMATING CONSTRUCTION COSTS

The LHA Development Team and the Board of Commissioners of the Loveland Housing Authority will make their final selection of a CM/GC for this Project based on their qualifications and experience, the management fees and general conditions expenses identified in their Proposal, as well as other factors. Actual construction costs are not a part of this RFP selection process.

Following the release of construction documents, the CM/GC will bid the entire Project to qualified subcontractors and material suppliers in each trade or division of work. A final AIA-A101 Owner-Contractor Agreement and A703 Schedules of Values will incorporate both the fees the CM/GC has provided to LHA as part of this Request for Proposal and the costs provided by the selected subcontractors and material suppliers following that bid process.



**Brookstone Apartments Rehabilitation
Request for Proposal
Construction Management/General Contractor**

INSTRUCTIONS TO BIDDERS

The Loveland Housing Authority (LHA) is accepting Proposals from qualified Construction Manager/General Contractor (CM/GC) firms to assist with the design and construction of an extensive rehabilitation of a 72-unit family apartment development in Loveland, Colorado. Those firms interested in submitting a Proposal to provide preconstruction, cost estimating, construction management and general contractor services must respond to a Request for Proposal.

Preference in the selection of the CM/GC firm will be given to those firms that have experience designing and constructing cost effective rehabilitations of moderate to low income multi-family projects in Colorado, which were financed utilizing the IRS Section 42 Low Income Housing Tax Credit (LIHTC) program. No other "local" preference shall be considered.

Copies of the Request for Proposal are available on the Housing Authority's website at www.lovelandhousing.org, or by contacting the Director of Real Estate Development via email:

Darcy McClure
Director of Real Estate Development
Loveland Housing Authority
dmclure@lovelandhousing.org
970-412-2400

ALL PROPOSALS MUST BE RECEIVED NO LATER THAN 12:00 NOON, TUESDAY, June 23, 2020 TO BE CONSIDERED. Proposals received after this date may be returned unopened. There will not be a public opening of the Proposals submitted.

No Pre-Proposal Conference is scheduled, although Bidders are encouraged to visit the project site. Deadline for submitting questions related to the RFP is 5:00 p.m., Wednesday, June 17, 2020. A written addendum will be issued to answer questions for all Bidders, if needed.

All Proposals submitted must be in the format provided in the Request for Proposal. Proposals not in this format will be returned without being considered.

Five (5) hard copy sets of the Proposal must be submitted with the response, plus one (1) electronic copy provided on a USB drive. Faxed or emailed proposals will not be accepted.



**Brookstone Apartments Rehabilitation
Request for Proposal
Construction Management/General Contractor**

SELECTION of CONSTRUCTION MANAGER/GENERAL CONTRACTOR

The LHA Development Team will use a two-step selection process to evaluate and select a CM/GC for the Brookstone Apartments Rehabilitation.

Initial evaluation of the Proposals will be performed by the LHA Development Team and LHA Board members. After review of the Proposals, up to three (3) Construction Management/General Contractor firms will be invited to participate in formal interviews, conducted by the LHA Development Team and LHA Board members. After the interviews, the Development Team will make its recommendation to the Board of Commissioners of the Loveland Housing Authority, who will make the final selection of the CM/GC firm. The Board of Commissioners may waive any improprieties contained in the selection process and shall not be bound by any recommendations, selection criteria or proposed fees. The decision of the Board of Commissioners shall be the final decision.

It is the intent of the LHA Development Team to interview only those firms who best demonstrate through their response to the Request for Proposal their understanding and experience managing and constructing rehabilitations of existing affordable multi-family housing developments of similar type, scale and complexity.

RESPONSE FORMAT

1. Bidders shall submit five (5) copies of all materials in a booklet format (8 ½ x 11) enclosed in a spiral binder with soft covers, which shall be properly formatted and tabbed in the format listed below. Although not a restriction, please limit your Proposal to no more than twenty (20) pages, not including the mandatory forms.

Additional information the Bidders wish to provide may be added at the end under separate tab. Three (3) ring binders will not be accepted.

2. Bidders shall provide an electronic USB flash drive version of the material contained in their Proposal.
3. Bidders shall include the mandatory forms identified and shall provide the appropriate signatures as instructed.

TAB 1 - EXPERIENCE

Provide the firm's experience managing and constructing rehabilitations of existing affordable multi-family housing projects, particularly with residents in place. The committee will make their selection based on the following:

- Firm's experience in constructing rehabilitations of existing affordable multi-family housing projects of similar type, scale and complexity, preferably performed for Housing Authorities or other non-profit housing providers. Projects listed should be in excess of \$2,500,000.
- Firm's experience in working on occupied projects with residents in place, requiring relocation plans, phased construction sequencing and related logistics of site safety for residents and their visitors.
- Firm's ability to incorporate unique construction methods and materials to meet affordability requirements while maintaining a commitment to creative design and a quality living environment.
- Firm's experience providing Pre-Construction and design support services for similar projects, including the firm's experience and capability to support the "Integrated Design Team's" needs for estimating proposed design components and providing the team with cost effective ways of implementation and construction.
- Firm's experience working with the City of Loveland Building Department.
- Firm's experience with projects utilizing Low Income Housing Tax Credit financing.
- Firm's experience with Davis-Bacon Wage and Section 3 reporting.
- Qualifications of the key assigned personnel for the Firm, with their respective project role and time commitment to the Project identified.
- Overall clarity and quality of the CM/GC Firm's Proposal response.

TAB 2 - FINANCIAL STRENGTH

Provide information concerning the financial longevity and stability of the CM/GC firm. The selection committee will evaluate the overall financial strength of each bidder to ensure the selected firm has the ability to withstand current economic conditions and construction climate, labor and skilled tradesmen shortages, and will be able to become an approved CM/GC by those firms who will be investing in the Project through the purchase of New Market Tax Credits.

Bidders should include such information as:

- Copy of the firm's most current audited financial statement. Firms who wish this information to remain confidential may provide the audited financial statement in a separate sealed envelope which the selection committee will review. If provided with a self-addressed, return postage envelope, LHA will return the financial information following their evaluation. If no return request is provided, LHA will shred this information after completing the evaluation. Financial information for the selected firm will be retained until completion of the Project.
- Total number of projects currently under contract, with anticipated completion dates and construction value.
- Documentation defining the firm's current bonding capacity.
- Total number of projects completed within the last five (5) years, with construction value.
- Information concerning any litigation the firm is currently, or has been, involved in over the past five (5) years.

TAB 3 – EGC and GREEN BUILDING EXPERIENCE

Provide information concerning the firm's experience managing and constructing projects which have become LEED certified, or which have met the requirements of the Enterprise Green Communities (EGC) design criteria. The Project must be able to meet the EGC criteria when

complete, and the committee will be looking for firms who understand the EGC criteria and who have participated in projects with the same or similar requirements.

Respondents should provide the panel with as much information as possible concerning their experience with “green construction” including:

- Firm’s experience in LEED certified or EGC compliant projects.
- Firm’s understanding of the Project scope.
- Firm’s approach to working with the Architect’s energy consultant for energy modeling.
- Firm’s approach to quality control and monitoring EGC compliance, particularly during site construction activities.
- Specific examples of “green” or sustainable components incorporated into previous projects that most closely resemble those required of Enterprise Green Communities.

TAB 4 - DAVIS-BACON & SECTION 3

Provide information on the firm’s experience and capabilities related to tracking Davis-Bacon Wages, and at least one (1) example of the proactive processes the firm will utilize when addressing the requirements of the Economic Development - Section 3 program.

TAB 5 - MANDATORY FORMS, INSURANCE COVERAGES and COST PROPOSAL

Pre-formatted forms related to the company, contact information and the CM/GC’s Cost Proposal. Cost proposals shall represent the firm’s best efforts concerning their role as CM/GC for the Project. See below for more information regarding the Cost Proposals.

Provide the following information concerning the CM/GC firm’s insurance coverages:

- General Liability: Single claim and aggregate limits.
- Automobile Liability: Combined single limit.
- Umbrella Liability: Single claim and aggregate limits.

Forms which ask for the Contractor’s professional fees and general conditions expenses will be required in the format provided.

TAB 6 - REFERENCES

Provide current references from Owners, Architects, Developers or other agencies for whom the CM/GC firm has managed and constructed similar projects. References should include both current phone numbers and email addresses.

Specific letters of reference from former clients for whom you built similar projects within the last five (5) years are encouraged. This is also the TAB where the Bidder may include letters of financial reference from their bank, CPA firm, insurance company or other financial institution.

TAB 7 - RESPONDENT’S SECTION

Reserved for the respondent to include any additional information they feel the committee should know about their company, their experience managing and constructing projects or any other information the bidder chooses to share with the committee.

INTERVIEWS

Interviews will be held remotely using Zoom or similar platform, and will provide the LHA Development Team and LHA Board members the opportunity to discuss with the CM/GCs their approach to managing and constructing the Project. Bidders are encouraged to focus their presentation on the specifics of the Project, and how their firm's experience and personnel would approach the Scope of Services and logistics of the rehabilitation.

The LHA Development Team will provide each firm invited to interview with a specific list of questions related to their Proposal that should be addressed in the interview.

Interviews will be used to clarify the Proposals received and to answer specific questions that arise during the review of the individual Proposals. Initial scoring may be modified for the finalist firms based on outcomes of the interviews. Debriefings with CM/GC Firms not selected will not be made available until after the selection process has been completed and the selected firm is under contract.

COST PROPOSAL

Cost Proposals shall be submitted utilizing the form provided without modification. The Cost Proposal needs to include a detailed disclosure listing items and their respective costs which comprise the amounts identified in each of the total fees presented. Refer to the Cost Proposal Form for more specific information concerning the breakout and definition of components to be included in the Proposal.

The Cost Proposal presented will be considered a binding offer to perform the services associated with this RFP and the complete management and construction of the Project. Once submitted, the offer cannot be changed. The CM/GC firm may recall the offer, and in doing so would automatically eliminate that firm from further consideration in the selection process.

The final contract between the Owner and the selected CM/GC firm will be a Lump-Sum Agreement to encompass all management and construction work required to build the project and secure Certificates of Occupancy, and all final approvals from the Owner, investors, financing institutions, and any other governmental agencies having an interest or jurisdiction concerning the Project.

Contract forms to be executed shall be standard AIA forms: A101-2017 Owner-Contractor Agreement – Stipulated Sum, and A201-2007 General Conditions of Contract for Construction, with this RFP and the firm's Cost Proposal as attachments. Any exceptions or modifications to the standard AIA language must be declared as a part of the CM/GC's Cost Proposal.

The Board of Commissioners of the Loveland Housing Authority may waive any improprieties contained in the selection process and shall not be bound by any recommendations, selection criteria or proposed fees. The decision of the Board of Commissioners shall be the final decision. Further, the LHA reserves the right to reject any or all Cost Proposals received and cancel the selection process, redefine the selection process, or defer to the Board of Commissioners to make the selection at their discretion.

SELECTION of CONSTRUCTION MANAGEMENT/GENERAL CONTRACTING FIRM

The final selection of the Construction Management/General Contracting Firm will be based on the material contained in the Request for Proposal, the presentations made during the interview process, and the firm's Cost Proposal. The committee will make their selection based on the following:

1. Firm's experience in managing and constructing rehabilitations of existing affordable multi-family housing projects of similar type, scale and complexity. Refer to TAB 1 – EXPERIENCE above for specific experience expectations;
2. Firm's experience in managing and constructing affordable housing projects for Housing Authorities or other non-profit housing providers;
3. Firm's experience in managing and constructing affordable multi-family housing projects utilizing LIHTC financing;
4. Firm's commitment to creativity and innovation, incorporating unique construction methods and materials to meet affordability requirements while maintaining a quality living environment;
5. Firm's knowledge and expertise integrating "green design", sustainability and energy conservation components into their project designs;
6. Firm's ability to meet the design and construction schedules established by the LHA Development Team;
7. Firm's ability to demonstrate knowledge of, and a cooperative working environment with, the City of Loveland Planning and Building Departments; and
8. Firm's comprehensive professional fees and general conditions expenses for the proposed Scope of Work.

The LHA Development Team and LHA Board members shall evaluate and score each Proposal using the following overall values:

- **RELEVANT EXPERIENCE – 30% of Evaluation**
- **EGC and SUSTAINABILITY PROJECTS – 15% of Evaluation**
- **FINANCIAL STRENGTH – 25% of Evaluation**
- **COST PROPOSAL and GENERAL CONDITIONS EXPENSES – 30% of Evaluation**

The LHA Development Team is not obligated to select a "preferred" candidate based only on individual scores or the final firm ranking. The recommendation will be based on whom it believes will bring the most experience, organization, professionalism, competency, innovation and value to the Project. The scoring and ranking process will be an important component used by the committee, but it is not bound to rely totally upon that process to make its final selection.

Following the determination of a "preferred" CM/GC firm, the LHA Development Team will forward its recommendation to the Board of Commissioners of the Loveland Housing Authority. The Board of Commissioners may accept and approve that recommendation, or the Board of Commissioners has the authority to reject the recommendation and base its final decision on any criteria it deems to be in the best interest of the Project and the Housing Authority.

The final contract will be negotiated between LHA and the CM/GC firm approved by the Board of Commissioners, with the final award based on the negotiated terms of the contract, the availability of the selected CM/GC's key project team (as represented in the RFP and the interviews) at the time the Project is ready to proceed, and the availability of the approved funding for the Project.



**Brookstone Apartments Rehabilitation
Request for Proposal
Construction Management/General Contracting Services**

PROJECT SCHEDULE (TENTATIVE)

Due date for RFP response	June 23, 2020 12:00 NOON
Short list finalist firms	By July 6, 2020
“Virtual” interviews with finalists	Morning of July 15, 2020
Architect/Design Team selection	Concurrent with CM/GC
Selection and contract award	July 22, 2020
Kick-off O/A/C and start design	Week of July 27, 2020
Schematic Design review	August 17, 2020
Design Development/70% CDs review	September 9, 2020
CM/GC cost estimate based on 70% documents	By October 1, 2020
LIHTC Application	By November 1, 2020
95% Construction Documents complete	By end of November, 2020
Tax Credits awarded by CHFA	February, 2021
Final pricing from CM/GC and building permits issued	By end of March, 2021
Tax Credit Partnership completed	By end of May, 2021
Construction begins	June, 2021
Construction complete (assume 9 months)	April 1, 2022



**Brookstone Apartments Rehabilitation
Request for Proposal
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INSTRUCTIONS TO BIDDERS

THE FOLLOWING INFORMATION MUST BE INCLUDED IN THE PROPOSAL

FIRM NAME _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

BUSINESS PHONE _____

CONTACT PERSON _____

TITLE _____

DIRECT PHONE NUMBER _____

E-MAIL ADDRESS _____

CELL PHONE NUMBER _____



**Brookstone Apartments Rehabilitation
Request for Proposal
Construction Management/General Contracting Services**

INSTRUCTIONS TO BIDDERS

CORPORATE INFORMATION

THE FOLLOWING INFORMATION MUST BE INCLUDED IN THE PROPOSAL

COMPANY NAME _____

COMPANY EIN: _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

PHONE _____

DATE of FORMATION/INCORPORATION _____

STATE of INCORPORATION _____

NUMBER of EMPLOYEES _____

BONDING CAPACITY _____

CONTRACTOR LICENSES(S): List License Number & Jurisdiction:



**Brookstone Apartments Rehabilitation
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INSTRUCTIONS TO BIDDERS

REFERENCES

THE FOLLOWING INFORMATION MUST BE INCLUDED IN THE PROPOSAL

1. List 3 Clients or Developers (preferably Housing Authorities or other non-profit housing providers) you have provided construction management and/or general contracting services to on projects of similar type, scale and complexity within the past five (5) years. Include current phone numbers and email addresses.
2. List 3 Architectural Firms who have designed projects of similar type, scale and complexity constructed by your Firm within the past five (5) years. Include current phone numbers and email addresses.
3. List 3 Subcontractors that you utilize most often on projects of similar type, scale and complexity, preferably for significant divisions of work such as excavation, concrete, masonry, drywall, plumbing, mechanical or electrical. Include current phone numbers and email addresses.
4. Provide current contact information for your trade banking facility.



Brookstone Apartments Rehabilitation
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INSTRUCTIONS TO BIDDERS

PROFESSIONAL CM/GC FEES and EXPENSES

THE FOLLOWING MUST BE INCLUDED IN THE PROPOSAL

DESIGN through CONST. ADMIN. – CM/GC FEE \$ _____

CM/GC PROFIT/FEE \$ (OR %) _____

GENERAL CONDITIONS FEES and EXPENSES \$ _____
(for this form, assume a total construction budget of \$5,000,000 and a 9-month schedule)

GENERAL CONDITIONS FEES and EXPENSES breakout required:

Superintendent(s):	_____
Other Contractor Staffing:	_____
Miscellaneous Temporary Staff:	_____
Construction Trailer & Equipment:	_____
Vehicles, Gas & Travel Expenses:	_____
Supplies, Tools, Misc. Costs:	_____
Liability Insurance (%):	_____ %
Builder's Risk Insurance (%):	_____ %
Other Insurances (%):	_____ %



**Brookstone Apartments Rehabilitation
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INSTRUCTIONS TO BIDDERS

THE FOLLOWING MUST BE INCLUDED IN THE PROPOSAL

NON-COLLUSIVE AFFIDAVIT

State of Colorado
County of _____

_____, being first duly sworn, deposes and says:

That (s)he is _____, the party making the foregoing Bid, that such Proposal or Bid is genuine and not collusive; that said bidder has not colluded, conspired, connived or agreed, directly or indirectly, with any bidder or person, to put in a sham bid or to refrain from bidding, and has not in any manner, directly or indirectly sought by agreement or collusion, or communication or conference, with any person, to fix the bid price, or that any other bidder or to secure any advantage against the Loveland Housing Authority or any person interested in the proposed Contract; and that all statements in said Proposal or Bid are true.

Bidder's Signature (Owner or Corporate Officer Required)

Date

NOTARY:

Subscribed and sworn to before me this ____ day of _____, 20__
My Commission Expires: _____

Notary Public's Signature

(SEAL)



**Brookstone Apartments Rehabilitation
Request for Proposal
Construction Management/General Contracting Services**

SUMMARY OF SERVICES and PROFESSIONAL FEES

THE FOLLOWING MUST BE INCLUDED IN THE PROPOSAL

THE UNDERSIGNED BIDDER, having familiarized himself/herself with the Scope of Work required by this Request for Proposal, the site where the work is to be performed, local conditions, laws, regulations and other factors affecting the performance of the work, and having satisfied himself of the completeness and adequacy of the information contained in the Request for Proposal, and the expense and difficulties to attend to the performance of work;

HEREBY PROPOSES AND AGREES, if this Bid is accepted, to enter into an Agreement to perform all work as described in this Request for Proposal, or as may be required by the Owner or the City of Loveland to participate in the Design, and provide Management and Construction of the rehabilitation of the 72-unit apartment development in Loveland, Colorado, and to assume all obligations, duties and responsibilities necessary to the successful completion of the work, for the **TOTAL LUMP SUM SERVICE FEE PRICE** defined herein:

TOTAL - ALL PROFESSIONAL FEE AND EXPENSES: \$ _____

THE UNDERSIGNED BIDDER acknowledges the bid price is a **LUMP SUM SERVICE FEE PRICE** inclusive of all professional services, materials, labor, travel, and incidental costs to participate in the work as defined in this Request for Proposal.

THE UNDERSIGNED BIDDER acknowledges the right of the Owner to reject any or all Bids submitted, and to waive any informalities and irregularities therein. This Bid shall remain open and shall not be withdrawn for a period of sixty (60) days from the due date of the Request for Proposal.

Submitted on this _____ **day of** _____, **20**__

BY: _____

TITLE: _____

COMPANY NAME: _____



**Brookstone Apartments Rehabilitation
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Construction Management/General Contracting Services**

APPENDIX

Site Plan

Capital Needs Assessment (CNA) by Partner Engineering and Science, Inc.