

# REQUEST FOR PROPOSALS (RFP) PHYSICAL NEEDS ASSESSMENT/ ENERGY AUDIT FOR READING HOUSING AUTHORITY

Date of Announcement: September 9, 2019

## Overview

Reading Housing Authority (RHA), 400 Hancock Blvd., Reading PA, 19611 is seeking proposals from firms to provide consulting services to perform a Physical Needs Assessment (PNA) and Energy Audit for the Public Housing Program. The focus of this assessment shall be 1,615 public housing units and all offices and maintenance buildings contained within the developments.

Reading Housing Authority (RHA) is a local government agency charged with administering Federal Public Housing and Housing Choice Voucher Programs for the City of Reading while also serving in the capacity of property manager, service provider and partner entity in a variety of other programs. The mission of the agency is to *provide a foundation for people to find a home of hope and achieve their aspirations*. RHA is currently engaged in year twelve of a twenty-year Phase II Energy Performance Contract (EPC) and has a current Energy Audit (EA) that expires October 11, 2021. See [www.readingha.org](http://www.readingha.org) for additional information on RHA.

## Proposer Qualifications

Proposers shall have the following minimum qualifications:

- Five years of experience with inspections of building systems including systems, roofs, structural components, living spaces, plumbing, electrical, HVAC, building envelope, emergency systems, elevators, community and program spaces, offices and grounds.
- A demonstrated track record of other contracts or similar services.
- Demonstrated experience with cost estimating.
- Demonstrated knowledge of applicable local and state building codes and ordinances.
- Demonstrated knowledge of Section 504 and American with Disabilities Act.

## Statement of Work/Minimum Deliverables

The purpose of this solicitation is to select a qualified firm to perform a Physical Needs Assessment (PNA) and Energy Audit of all RHA Public Housing properties as a foundation for the agency's strategic planning purposes. Specifically, RHA seeks to best understand the capital needs of the RHA Public Housing portfolio, evolve the agency's management of expenditures under the HUD Capital Fund Program, embrace opportunities for energy conservation, and prepare for any federal opportunities or mandates that may require the comprehensiveness of data that shall be derived from a complete evaluation. The PNA will consist of pre-assessment, assessment, and post assessment services, including a physical inspection of 10 % of all units per development. The selected contractor will provide a full range of services including evaluating the existing conditions of the housing stock, to include a random selection of units, common areas, offices and storage facilities.

All identified physical improvements will meet or exceed the HUD mandatory standards and those established by local 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 age of buildings. The assessment is of observable-components only; destructive testing is not anticipated and would only occur with prior RHA approval. The effort should provide the agency with the information necessary to ensure long-term physical viability and in a manner suitable for planning and budgeting purposes. Data shall be delivered in a best-practice format for the industry, include Excel spreadsheet-based reporting that include cost-estimating over 20 years, and prioritize work items for immediate, short-term, intermediate and long-term attention.

The Physical Needs Assessment shall be performed in conjunction with an Energy Audit, and the Energy Audit findings shall be integrated into the Physical Needs Assessment.

### Technical Requirements

The successful proposer must:

- Review history of the PNA program prescribed by the Department of Housing and Urban Development (HUD) and incorporate theoretical elements as have practical application to the required deliverables.
- Perform interviews as needed with knowledgeable RHA staff as to the existing documents, plans, building histories, maintenance records, REAC scores, etc. of each property.
- Identify all development components that will be part of the assessment.
- Establish a sampling methodology for units that will include 10% of all units per property. The sample must also include at least 1 of each unit size in each building type. Units must be distributed so that a variety of conditions will be evaluated (top floor units, corner units, areas where weathering occurs, etc.). Section 504 units will be included so that they are also represented equitably in the sampling methodology including locations and bedroom sizes.
- Establish a methodology that will sample common lobby areas and corridors.
- Establish a plan to inspect 100% of the site, all systems, paving and grading, building exteriors, finishes, common areas, offices, basements, utilities, laundry facilities, areas, sprinklers, emergency systems, security systems, crawl spaces, etc. Note that if individual units have individual HVAC, basements, etc. then these will be part of the 10% sample, except in cases where there may be atypical components which should be assessed individually.
- Estimate an Expected Useful Life (EUL) for each component.
- Identify a replacement cost on an individual component and for a total of those components. (Example: per window and per window X all similar windows).
- Inspect all ADA units to ensure that components are functioning per their purpose. (Note: A regulatory compliance review is not required for these units or areas, just a functionality and EUL assessment.)
- Prepare a report to be provided to RHA in narrative, and spreadsheet forms that meet RHA requirements, in both paper and electronic format.
- Identify any deficiencies that could have an impact on health and safety and bring this to the immediate attention of the RHA Contract Manager.

### Submission and Award

A Pre-Proposal Meeting will be held at 10:00 a.m. on Tuesday, September 24, 2019 at the Reading Housing Authority Willis Center for Administration (WCA), 400 Hancock Blvd., Reading, PA 19611. Proposers are encouraged to attend.

One (1) electronic and four (4) copies of the proposal will be due at WCA by 3:30 p.m. eastern standard time on Wednesday, October 9, 2019.

Proposals must contain the following required forms. Failure to include these items may result in the discarding of the proposal.

- Non-Collusive Affidavit
- Section 3 Compliance Agreement
- Section 3 Demonstration of Capability

The following documents are for informational purposes.

- Form HUD-5369-B, Instructions to Offerors – Non-Construction  
<https://www.hud.gov/sites/documents/5369-B.PDF>
- Form HUD-5369-C, Certifications and Representations of Offerors – Non-Construction Contract  
[https://www.hud.gov/sites/documents/DOC\\_12132.PDF](https://www.hud.gov/sites/documents/DOC_12132.PDF)
- Form HUD-5370-C, General Conditions for Non-Construction Contracts I & II  
[https://www.hud.gov/sites/documents/DOC\\_12587.PDF](https://www.hud.gov/sites/documents/DOC_12587.PDF)  
[https://www.hud.gov/sites/documents/DOC\\_12588.PDF](https://www.hud.gov/sites/documents/DOC_12588.PDF)

Proposals will be rated by a selection committee against the following criteria, with the maximum possible points being 150. Each criterion will be given a weight, and proposal will be judged on how well they meet that criteria, with the rating multiplier of Low (1 point), Medium (2 points) and High (3 point). Proposers who fail to address a criterion in their proposal will receive a 0-point score for the item. The criterion areas for this RFP are as follows:

		Multiplier	Weight
1	Experience performing Physical Needs Assessments	0, 1, 2, 3	10
2	Experience conducting Energy Audits	0, 1, 2, 3	10
3	Experience with HUD/multi-family properties/programs	0, 1, 2, 3	7
4	Proposed staffing methods and qualifications	0, 1, 2, 3	5
5	Proposed plan to conduct field assessment and meet completion timeframe	0, 1, 2, 3	5
6	Proposed plan to meet or address Section 3/minority business enterprise	0, 1, 2, 3	3
7	Proposed lump-sum fee	0, 1, 2, 3	10

Proposers may be invited for oral discussion concerning elements of the proposal, negotiation of pricing and overall costs, and invitation for revision(s) prior to the final selection. RHA reserves the right to award the contract to the proposer who represents the best overall value and likelihood of assisting the agency in meeting its stated goals, and to reject any or all responses to this RFP. RHA anticipates that a contract for the successful proposer will be issued by October 25, 2019, with a final product due for delivery to RHA by January 8, 2020.

#### Miscellaneous

RHA is a smoke-free campus. Contractors and vendors are expected to abide by these requirements.

#### Attachments

RHA Property Chart/Public Housing