



PARTNERS SOUTHEAST

To: Prospective Respondents
Date: October 2, 2018
Subject: Request for Qualifications (RFQ) PSE-2018-100 for Pool of Qualified Architectural & Engineering Firms

Partners Southeast (Partners), a non-profit, tax exempt 501(c)(3) is seeking the services of experienced architect and engineering teams with residential and commercial design experience who will work as part of a team which includes an architect, mechanical, electrical, plumbing and structural engineers. The team will be working in a collaborative effort to construct multifamily developments in Baton Rouge, Louisiana and throughout the Southeast region.

Electronic RFQ Bid Notification

Firms who are interested in responding to this RFQ must register with <https://ha.economicengine.com/> to receive the RFQ and to receive any updates, notifications and bid modifications associated with the RFQ. All modifications to this RFQ will be posted on <https://ha.economicengine.com/>. This RFQ will only be available on this website.

Proposals Due

Proposals shall be due no later than October 23, 2018 at 5:00 p.m. CDT. No submittals will be accepted after this deadline. Submittals must be sealed and will be received at the following address: Partners Southeast, 4731 North Boulevard, Baton Rouge, Louisiana 70806.

Partners reserves the right to accept or reject any or all responses, and to waive informalities. No oral interpretations will be given to any response as to the meaning or intent of the Contract Documents or be effective to modify any provisions of the documents. No response shall be withdrawn for a period of ninety (90) days subsequent to the submission of offers, without the prior written consent of Partners. The successful candidate shall be required to possess all applicable licenses, certifications, insurance and bonding. Partners prohibits discrimination in any manner based on race, color, creed, national origin, sex, age, or disability and will pursue an affirmative policy of fostering, promoting and conducting business with minority owned enterprises.



**4731 North Boulevard
Baton Rouge, Louisiana 70806**

REQUEST FOR QUALIFICATIONS

PSE-2018-100

**FOR POOL OF QUALIFIED
ARCHITECTURAL & ENGINEERING FIRMS**

Release Date

October 2, 2018

Submissions Due

**October 23, 2018
5:00 p.m. CDT**

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I. INTRODUCTION

Partners Southeast (Partners) is a non-profit, tax exempt 501(c)(3) affordable housing developer. Partners is developing multifamily communities throughout East Baton Rouge Parish and will expand to other states throughout the Southeast. These developments will be financed utilizing Low-Income Housing Tax Credits (LIHTC), HUD grants (i.e. CDBG, HOME) and conventional financing.

II. PURPOSE OF THIS REQUEST FOR QUALIFICATIONS

Through this Request for Qualifications (RFQ) Partners is seeking the services of a pool of qualified architectural and engineering teams, led by architects licensed in Louisiana, with expertise in all phases of planning and design of residential and commercial projects. Partners will select up to five (5) qualified teams.

III. SCOPE OF SERVICES

The scope of architectural, engineering and related services for the project described in this RFQ may include some or all of the following services:

- A. Site Analysis and Selection:** Participate in and/or perform detailed site analysis, including required, urban, regional, or site-specific development planning;
- B. Land Use Entitlement:** Support and/or participate in the preparation of environmental studies and reports related local and state laws and regulations; (Environmental site surveys and hazard documentation; and site remediation services are not included in scope of services of this RFQ);
- C. Development Studies:** Conduct or participate in planning, parking and traffic, zoning, geotechnical, on-site and off-site utility and related utilization studies required for site consideration and acquisition and for project development and approvals;
- D. Functional Programming and Detailed Space Planning:** Conduct and/or review, and confirm functional programming, design definition, and space planning for court building functions, including surveys of existing facilities and develop or assist in the development of project requirements documents, including complete site, functional requirements, conceptual building, and test fit studies;
- E. Architectural and Engineering Design Services for New Construction:** Provide architectural, structural, civil, mechanical, electrical, plumbing, sustainable and LEED™ design, security, acoustical, interior design, lighting, audio visual, data/telecommunications, graphics design, building information modeling (“BIM”) and related services which may be required in connection with planning, design and a new building project. Special services that may be requested including but not limited to, geotechnical engineering; land surveys; wind engineering; vibration control; life safety/code consulting; audio visual; physical and electronic security design; parking structure design; parking revenue control; and art, where appropriate.

- F. Planning and Building Code Analyses:** Conduct and/or participate in all building and planning code analysis and reviews, including progressive and final analyses prior to design approvals, during coordination with Partners and executive branch agency reviews, and during and after construction. Analyses may include seismic hazard review where appropriate;
- G. Contracting and Sourcing:** Provide consultation on and analysis of methods of sourcing which may be used for the building project, Construction Manager at Risk, participate in preparation of associated conventional or unique contract documents required for procurement; participate in construction contract bid analysis of general and special construction and/or construction management contracts; (Legal services, construction management, and construction services are not included in the scope of services in this RFQ);
- H. Cost Analysis and Schedule Planning:** Provide for all aspects of project cost estimating and schedule planning, including construction estimating, life cycle costing, value engineering, constructability reviews, critical path, and special scheduling;
- I. Design Services for Furniture, Fixtures and Equipment:** Provide all services required to properly plan, design, specify and coordinate furniture, fixtures, special finishes and equipment, including but not necessarily limited to: interior design, including millwork design and furniture specification, and finished material details;
- J. A/V, Telecommunications, Security, Low-Voltage Systems Design:** Provide all services required to properly plan, design and coordinate new and existing A/V, telecommunications, security and related low voltage systems associated with courthouse equipment.
- K. Site Planning and Landscape Architecture:** Provide all services required to properly plan, design, specify and coordinate exterior site design, including grading, parking lots, roads, driveways, hardscape, landscape, irrigation and coordination of underground utilities and/or building structures with landscape and hardscape elements;
- L. Construction Contract Administration:** Provide construction phase services, including (but not necessarily limited to) field observations, RFI and submittal reviews and processing, review of testing and inspection reports required by the bid documents (testing laboratory or construction inspection services are not part of this RFQ), coordination of finishes, furnishings and equipment, evaluation of pricing and schedule impacts for consideration/negotiation of changes, and project contract completion, including punch list, warranty review, preparation of record drawings and closeout;
- M. Building Commissioning:** Participate in the development of building commissioning documents and procedures; and participation in commissioning program. (Specialized Commissioning agent services are not part of this RFQ);
- N. Move and Occupancy Planning:** Plan, design, and execute temporary relocation, move planning, and start-up assistance;

- O. Sustainable Design and Green Building Standards:** Some projects shall be designed for sustainability and other, prescribed green buildings standards.

IV. PARTNERS CONTRACT REQUIREMENTS AND DOCUMENTS

All work in all project phases shall be completed in strict accordance with the appropriate AIA agreement and/or documents along with all other forms and requirements as specified. All work is subject to, and shall comply with, all Federal, State and Local government requirements, regulations, codes, guidelines, standards, and policies. The selected A/E teams will become part of a pool of qualified teams that will be individually selected by Partners for each project undertaken based upon experience related to project type, demonstrated proficiency and availability.

A. Partners Economic Opportunities and MWBE contract requirements

It is the strong intent of Partners to provide employment, training, contracting, and other economic opportunities to those who qualify as low- and very low-income individuals and businesses in the areas where the Partners projects are located, and for those who qualify as Minority and Women Business Enterprises (MWBE). The following exhibits are available with this solicitation.

1. Exhibit A – Partners Economic Opportunities Program
2. Exhibit B – Partners Minority and Women Business Enterprise (MWBE) Compliance

V. INSURANCE REQUIREMENTS

A. Insurance Requirements

Before work begins, Contractor and all subcontractors engaged by it shall procure from a reputable insurance company authorized to do business in the State of Louisiana the following insurance policies which provide (at a minimum) the following coverages:

1. Commercial General Liability: Shall have minimum limits of \$1,000,000 per occurrence combined single limit with a \$2,000,000 annual aggregate for bodily injury liability and property damage liability. This shall include premises and/or operations, independent contractors, products and/or completed operations, broad form property damage and XCU coverage, and a contractual liability endorsement.
2. Business Auto Policy: Shall have minimum limits of \$1,000,000 per occurrence combined single limit for bodily injury liability and property damage liability. This shall include owned vehicles, hired and non-owned vehicles, and employee non-ownership.
3. Workers Compensation: Insurance covering all employees and owners performing work or providing services under this contract. The coverage must include employers' liability with a limit of \$100,000 each accident, \$100,000 bodily injury by disease each owner/employee, and \$500,000 bodily injury by disease policy limit. Where applicable, coverage shall meet any additional requirements of state and federal law.

4. Umbrella Policy: \$5,000,000 Per Occurrence / \$5,000,000 Annual Aggregate.

VI. INSTRUCTIONS AND NOTICE TO RESPONDENTS

A. Inquiries

All questions concerning the RFQ must be posted at <https://ha.economicengine.com/>.

No verbal requests for clarification or information will be accepted. The deadline for submitting all questions is 11:00 a.m. CDT, October 9, 2018. Responses to questions will be posted to the bid on <https://ha.economicengine.com/>. If additional material or interpretation is needed, it will be provided as an Addendum to the RFQ and will also be posted. All vendors who have registered with <https://ha.economicengine.com/> to receive this RFQ will receive an email update via <https://ha.economicengine.com/>. Such Addendum will have the same binding effect as though contained in the original RFQ.

B. General Submission Requirements

The instructions below provide guidance for the preparation and submission of responses along with information on the Evaluation Criteria. Their purpose is to establish the requirements, format and content of responses so that they are complete, contain all essential information and can be evaluated fairly.

As threshold, the architectural firm must demonstrate as least three (3) completed, new construction, multifamily (senior/family/supportive), mixed-use and adaptive reuse projects.

C. Submission Package

An unbound original (with signatures and labeled Original) and four (4) copies of the complete submission package must be received by Partners by October 23, 2018, 5:00 p.m. CDT. An electronic copy via flash drive must also be submitted. The original and all copies of the response must be submitted in a sealed envelope or box. On the outside should be the respondent's name, address, telephone number, and the due date. The outside cover should also include the following information:

**REQUEST FOR QUALIFICATIONS
FOR POOL OF QUALIFIED
ARCHITECTURAL & ENGINEERING FIRMS**

Request for Qualifications (RFQ) PSE-2018-100

Partners Southeast

**4731 North Boulevard
Baton Rouge, Louisiana 70806**

The submission package must be signed by an officer of the respondent who is legally authorized to enter into a contractual relationship on behalf of the respondent, and the respondent must affix the organization's corporate seal to these documents. In the absence of

a corporate seal, the submission package must be notarized. Respondents' qualifications will be held in confidence and not released in any manner until after contract award.

D. Submission Response Requirements

All submission packages should be bound (a 3-ring binder is acceptable) and tabbed by sections as follows:

1. Title Page

Title Page should include the Request for Proposals subject, the firm's name; the name, address, telephone number, fax number and e-mail address of the contact person; and the date of the proposal.

2. Statement of Qualifications

A signed letter stating the proposer's professional qualifications, understanding of the work to be done, the commitment to perform the work within the time period, and a statement as to why the firm believes it is the best qualified to provide architectural and engineering services for new construction, multifamily (senior and family), mixed-use and adaptive reuse projects.

3. Firm Identification

Identify your organization's point of contact, proposed team comprised of the Architect and Engineers (or key sub-consultants): Civil, Structural, Mechanical, Electrical, low-voltage and LEED/Sustainability (as applicable), and an organizational team chart for the project. The lead architectural firm should provide the following information:

- Legal name of the company as registered with the firm's Secretary of State
- Legal structure (individual, partnership, corporation, joint venture, etc.)
- Address of the office that will be providing services
- Number of years in business
- Number of employees by skill group

4. Resumes of Key Personnel

Provide resumes for the key personnel that will constitute the actual team you propose to provide to Partners the services necessary to complete the project. Include your organization's principal-in-charge for this project, project manager, project architect, and project designer or alternate team roles. For your sub-consultants include principal-in-charge for this project and project engineer (one page per person maximum). In composing your team, Partners urges that you propose teams and individuals which have the requisite experience for the size, scale and complexity of the subject project and availability during the time frame proposed. In particular, the teams should have the proven, commensurate experience in multifamily, mixed-use and adaptive reuse projects, in the proposing organization, or in past employment. (One page per person maximum);

5. Example Projects

Provide examples of your organization's projects (no more than 10 projects) which best illustrate their collective firm, and individual qualifications for the scope and size of the specific project for which you propose to compete. Provide one attached page following the text page for each project for supporting photographs and/or graphics. Provide the following information for each project listed:

- Project name, location, contract delivery method, and description
- Color images (photographic or machine reproductions)
- Final construction cost, including change orders
- Final project size in gross square feet
- Type of construction (new, renovation, or expansion)
- Actual start and finish dates for design
- Actual notice to proceed and substantial completion dates for construction
- Description of professional services prime firm provided for the project
Name of Project Manager (individual responsible to the Owner for the overall success of the project)
- Project Architect (individual responsible for coordinating the day-to-day work)
- Project Designer (individual responsible for design concepts)
- Engineers and Consultants
- Project Manager for each consultant

Indicate any projects accomplished by the staff you are proposing that were conducted while under the employment of others. Project examples cited should be either multifamily, mixed-use and adaptive reuse projects of similar complexity completed in the last ten (10) years which demonstrate the firm's ability and experience to successfully complete the project. Provide Owner's information as a reference contact for verification of firm, team and individual roles and responsibilities for project(s) you have listed. (Two pages per project maximum); (Two pages per project maximum);

6. Key Personnel

Participation of the key proposed team members in the project examples should be provided. (One page maximum);

7. Proposed Approach

Provide a description of: a) your organization's approach to the design of multifamily, mixed-use and adaptive reuse projects. Describe your firm's experience working with the Construction Manager at Risk project delivery method. Discuss your method of working with the contractor as a team member to deliver a GMP and to maintain the GMP throughout the design and construction process. (Four pages maximum);

8. General Qualifications

Provide general qualifications for the prospective proposer's office or branch office that is performing the work described in the RFQ. Please indicate current employees

by discipline. More importantly, provide professional licensure for each firm. In addition, provide licensure to conduct business within the State of Louisiana.

9. Supporting Documentation: Litigation History

List any litigation(s) or resolution(s) within the past 5 years, include dispute(s) that were or were not resolved through arbitration.

10. Partners Economic Opportunities Program

For guidance on responding to this Submission Requirement see **Exhibit A – Partners Economic Opportunities Program** in this solicitation.

Partners is committed to ensuring that employment, training, contracting, and other economic opportunities generated by this project are directed to low- and very low-income individuals where Partners projects are located, and to those business concerns that substantially support those efforts. Partners’ overall EOP goals are as follows:

- a. **Employment of low and very low-income individuals** – at least thirty percent (30%) of the aggregate number of new hires for the duration of the contract.
- b. **Contracting with business concerns that substantially support low- and very low-income individuals** – (a) at least ten percent (10%) of the total dollar amount of the contract for building trades work arising in connection with housing rehabilitation, construction, and (b) at least three (3%) of the total dollar amount of all other contracts to eligible businesses that substantially support low and very low-income individuals.

11. Commitment to Minority and Women Business Enterprises (MWBE) Participation

This category will evaluate MWBE participation as specified in **Exhibit B – Minority and Women Business Enterprise (MWBE) Compliance** in this solicitation.

VII. EVALUATION CRITERIA

The submittals will be evaluated based on the criteria listed in this section. In preparing the submittal to Partners, it is important for proposers to clearly demonstrate their expertise in the areas described in this document.

Firms are encouraged to identify and clearly label in their submittal how each criterion is being fully addressed. Evaluation of responses to this RFQ will be based primarily on the information provided in the submittal package and, secondarily (if required), on interviews of respondents whose proposals qualify for selection, meet the requirements, and are within the competitive range. Partners reserves the right to request additional information or documentation from the firm regarding its submittal documents, personnel, financial viability, or other items to complete the selection process. If a responding firm chooses to provide additional materials in their proposal beyond those requested, those materials should be included in a separate section of the proposal.

VIII. RFQ SCHEDULE*

Request for Proposals Issued	October 2, 2018
Final Date to submit questions All questions must be submitted to https://ha.economicengine.com/ by 11:00 a.m. CDT	October 9, 2018, 11:00 a.m.
Proposal Due Date Late Submissions will not be accepted.	October 23, 2018, 5:00 p.m.

** Partners reserves the right to modify the RFQ schedule at Partners' discretion. All times are Central Time. Proper notification of changes in the response due date will be made to all interested parties on <https://ha.economicengine.com/>.*

IX. SELECTION PROCESS

Once responses to this RFQ are received, an evaluation of the proposals will be conducted in accordance with the criteria of this RFQ. Upon completion of the proposal evaluation, the Selection Panel with those firms whose proposals qualify for selection, meet the requirements and are within the competitive range.

X. ADDITIONAL RFQ TERMS AND CONDITIONS

A. Expense of Submission

All expenses involved with preparation and submission of responses to Partners, as well as, all expenses associated with the respondent's attendance associated with an oral presentation, interview or other pre-award activities shall be borne by the respondent. All information, including plans, specifications and photos, submitted to Partners by Respondent in response to the RFQ become the property of Partners regardless of award of the contract.

B. Partners Options

Partners may reject any and all, submittals; re-advertise this RFQ; postpone or cancel, this RFQ process; or waive any minor irregularities in this RFQ. Also, the determination or the criteria and process whereby responses are evaluated, the decision as to who shall receive a contract award, or if an award shall ever be made as a result of this RFQ, shall be at the discretion of Partners. Also, Partners may initiate additional RFQs to add additional firms during the life of this agreement. It is the intent of Partners to select up to five (5) firms, however, the Partners reserves the right to select more firms from this solicitation if it is deemed to be in the best interest of Partners.

C. Confidential Information Procedures

Upon receipt and the conclusion of the procurement process (to include evaluation and contract award), your Proposal is considered confidential and the property of Partners. Also, please note that Partners is not subject to Louisiana Public Records Law.

D. Level of Effort and Funding

It should be clearly understood that all services requested in this RFQ are on an “as needed basis.” This RFQ in no way constitutes a guarantee of the level of effort that may be requested of the successful respondent.

E. Rules, Regulations and Licensing Requirements

All candidates and staff shall possess all required state and local licenses. In addition, the successful respondent shall comply with all laws, ordinances and regulations applicable to the services contemplated herein, especially those applicable to conflict of interest. Candidates are presumed to be familiar with all Federal, State and Local Laws, Ordinances, Codes, Rules and Regulations that may in any way affect the services. In any subsequent contract, the successful candidate must agree to follow all local, State, and Federal regulations as well as Partners requirements specified herein.

F. Limitation on Projects

If a firm(s) wishing to participate in this RFQ already has work or active engagement with Partners, that firm(s) will not be precluded from consideration for additional work under this solicitation.

G. Assignment

The successful respondents shall not enter into any subcontracts, retain consultants, or assign, transfer, convey, sublet, or otherwise dispose of the ensuing contract, or any or all its rights, title or interest, herein, or its power to execute such contract to any person, company or corporation without the prior written consent of Partners.

H. Equal Opportunity Employment

The respondent will agree that there will not be discrimination as to race, sex, religion, color, age, creed, or national origin regarding obligations, work, and services performed under the terms of any contract ensuing from this RFQ. The respondent must agree to comply with Executive Order No. 11246 entitled “Equal Employment Opportunity” and as amended by Executive Order No. 11375, as supplemented by the Department of Labor Regulations (41 CFR, Part 60).

I. Partners Economic Opportunities Program Clause

1. The purpose of the Partners Economic Opportunities Program is to ensure that employment and other economic opportunities generated by Partners projects, shall, to the greatest extent feasible, be directed to low- and very low-income persons, especially those in the area where Partners projects are located.
2. The parties to this contract agree to comply with Partners’ Economic Opportunities Program. As evidenced by their execution of this contract, the parties to this contract certify that they are under no contractual or other impediment that would prevent them from complying with this program.

3. The contractor agrees to post a notice advising the public of the contractor's commitments and will post copies of the notice in conspicuous places at the work site where both employees and applicants for training and employment positions can see the notice. The notice shall describe the Partners EOP program, shall set forth minimum number and job titles subject to hire, availability of apprenticeship and training positions, the qualifications for each; and the name and location of the person(s) taking applications for each of the positions; and the anticipated date the work shall begin.
4. The contractor agrees to include this Partners Economic Opportunities Program Clause in every subcontract and agrees to take appropriate action upon a finding that the subcontractor is not in compliance with the Partners EOP. The contractor will not subcontract with any subcontractor where the contractor has notice or knowledge that the subcontractor has been found not in compliance with the EOP.
5. The contractor will certify that any vacant employment positions, including training positions, that are filled (1) after the contractor is selected but before the contract is executed, and (2) with persons other than those to whom the EOP requires employment opportunities to be directed, were not filled to circumvent the contractor's obligations under this program.
6. Noncompliance with the Partners EOP may result in sanctions, termination of this contract for default, and debarment or suspension from future Partners contracts.

J. Personnel

In submitting their statements, respondents are representing that the personnel described in their responses shall be available to perform the services described, barring illness, accident, or other unforeseeable events of a similar nature in which case the respondent must be able to provide a qualified replacement. Any replacement in personnel must be approved by Partners. Furthermore, all personnel shall be, at all times, the sole employees of the respondent, under its sole direction, and not employees or agents of Partners.

K. Acceptance of RFQ

Proposer's submission of a response to this RFQ shall constitute acceptance by the respondent of the terms and conditions of this RFQ.

L. No Warranty

Respondents are required to examine this RFQ carefully. Failure to do so will be at the respondent's own risk. It is assumed that the respondent has made full investigation to be fully informed of the extent and character of the services requested and of the requirements of this RFQ. No warranty is made or implied as to the information contained in this RFQ.

M. Complete and Accurate Submission

A respondent's failure to provide complete and/or accurate information in response to this RFQ may disqualify the respondent from further participation in this selection process. A response may be corrected, modified, or withdrawn, provided that the correction, modification, or request for withdrawal is made by the respondent in writing and is received at the place and prior to the date and time designated in the RFQ for receipt of responses. After such date and time, the respondent may not change any

provision of its response in a manner prejudicial to the interests of Partners and/or fair competition.

N. Communication with Partners Regarding RFQ

Except as specifically addressed elsewhere in the RFQ, prospective proposers must send any communications regarding the RFQ to <https://ha.economicengine.com/>

O. Right to Reject Proposals

Partners may cancel the RFQ for any or no reason. After the proposal due date and time listed in the timeline of the RFQ, Partners may reject all proposals and cancel the RFQ if Partners determines that: (i) the proposals received do not reflect effective competition; (ii) the majority of the teams are not qualified; or (iii) awarding the contract is not in the best interest of Partners.

Partners may or may not waive an immaterial deviation or defect in a proposal. Partners's waiver of an immaterial deviation or defect shall in no way modify the RFQ or excuse a prospective proposer from full compliance with RFQ specifications.

Partners reserves the right to issue similar RFQs in the future. The RFQ is in no way an agreement, obligation, or contract and in no way is Partners responsible for the cost of preparing the proposal.

Proposers are specifically directed **NOT** to contact any Partners personnel or consultants for meetings, conferences, or discussions that are related to the RFQ at any time between release of the RFQ and any award and execution of a contract. Unauthorized contact with any Partners personnel or consultants may be cause for rejection of the proposer's proposal.