

# **Jacksonville Housing Authority**

## **REQUEST FOR PROPOSALS (RFP) No. PS-005-22**

### **Physical Needs Assessment**



**RFP Document**

[Table of Contents - Table No. 1]

Section	Description	Page
	<b>Introduction</b>	<b>3</b>
	<b>RFP Information at a Glance</b>	<b>3</b>
<b>1.0</b>	<b>JHA’s Reservation of Rights</b>	<b>4</b>
<b>2.0</b>	<b>Scope of Work (SOW) / Technical Specifications (T/S)</b>	<b>5</b>
2.1	<b>Description of Services</b>	<b>5</b>
2.2	<b>General Requirements</b>	<b>5</b>
2.3	<b>Phases of Work</b>	<b>13</b>
2.4	<b>Scope of Work</b>	<b>13</b>
2.5	<b>PNA Report</b>	<b>14</b>
2.6	<b>Energy Audit (EA) Scope of Work / Technical Specifications</b>	<b>16</b>
2.7	<b>Deliverables and Timeframe</b>	<b>18</b>
2.8	<b>Deliverables and Timeframe / Milestones</b>	<b>19</b>
2.9	<b>Qualifications</b>	<b>19</b>
<b>3.0</b>	<b>Proposal Format</b>	<b>20</b>
3.1	<b>Tabbed Proposal Submittal</b>	<b>23</b>
3.2	<b>Entry of Proposed Fees</b>	<b>23</b>
3.3	<b>Additional Information Pertaining to each Pricing Item</b>	<b>23</b>
3.4	<b>Proposal Submission Responsibilities</b>	<b>23</b>
3.5	<b>Proposer’s Responsibilities — Contact with the Agency</b>	<b>24</b>
3.6	<b>Proposer’s Responsibilities — Equal Employment Opportunity and Supplier Diversity</b>	<b>25</b>
3.7	<b>Pre-bid Conference</b>	<b>27</b>
3.8	<b>Recap of Attachments</b>	<b>27</b>
<b>4.0</b>	<b>Proposal Evaluation</b>	<b>28</b>
4.1	<b>Evaluation Factors</b>	<b>28</b>
4.2	<b>Evaluation Method</b>	<b>29</b>
<b>5.0</b>	<b>Contract Award</b>	<b>31</b>
5.1	<b>Contract Award Procedure</b>	<b>31</b>
5.2	<b>Contract Conditions</b>	<b>32</b>
5.3	<b>Contract Period</b>	<b>33</b>
5.4	<b>Licensing and Insurance Requirements</b>	<b>33</b>
5.5	<b>Contract Services Schedule</b>	<b>33</b>
5.6	<b>Right to Negotiate Fees</b>	<b>33</b>
5.7	<b>Prompt Return of Contract Documents</b>	<b>34</b>
	<b>Index of Tables</b>	<b>34</b>

**REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard**

**INTRODUCTION**

The Jacksonville Housing Authority (hereinafter, “the Agency”) is a public entity that was formed to provide federally subsidized housing and housing assistance to low-income families in the Duval County, Baldwin and Jacksonville Beach areas. The Agency is headed by a President / CEO and is governed by a seven-person board of commissioners and is subject to the requirements of Title 24 of the Code of Federal Regulations (hereinafter, “CFR”), Florida Statute Chapter 287, and the Agency’s procurement policy.

In keeping with its mandate to provide efficient and effective services, the Jacksonville Housing Authority (JHA) is now soliciting proposals from qualified, licensed and insured independent contractors to provide the noted services outlined in this solicitation for all Public Housing properties at the Jacksonville Housing Authority. All proposals submitted in response to this solicitation must conform to all the requirements and specifications outlined within this document and any designated attachments in its entirety.

**RFP INFORMATION AT A GLANCE**

[RFP at a Glance – Table No. 2]

<b>JHA CONTACT PERSON (NOTE:</b> Unless otherwise specified, any reference herein to “Contracting Officer” or CO” shall be a reference to the Agency contact person listed)	Colene Orsini Telephone: (904) 366-6078 Email: corsini@jaxha.org
<b>HOW TO OBTAIN THE RFP DOCUMENTS ON THE EPROCUREMENT MARKETPLACE</b>	1. Access ha.internationaleprocurement.com (no “www”). 2. Click on the “Login” button in the upper left side. 3. Follow the listed directions. 4. If you have any problems in accessing or registering on the Marketplace, please call customer support at (866)526-9266.
<b>PRE-BID MEETING TIME &amp; LOCATION</b>	<b>December 6<sup>th</sup>, 2021 @ 2:00 p.m. EST</b> Due to current restrictions related to COVID-19 a pre-bid meeting will only be held via RingCentral. If you are interested in attending, email the Contact Person, and request a meeting invite be forwarded that contains all the necessary information to join.
<b>WRITTEN INQUIRIES SUBMITTAL DEADLINE</b>	<b>December 20<sup>th</sup>, 2021 at 12:00 p.m. (Noon) EST</b>
<b>HOW TO FULLY RESPOND TO THIS RFP BY SUBMITTING A PROPOSAL SUBMITTAL</b>	<b>All Proposals must be clearly labeled and denote the above RFP number and submitted in a sealed envelope to 1300 Broad Street N. Jacksonville, FL 32202 and include the items outlined in Section 3.0. It must include one (1) original and four (4) copies of your full submittal package.</b>
<b>PROPOSAL SUBMITTAL RETURN &amp; DEADLINE</b>	<b>Proposal Due: January 3<sup>rd</sup>, 2021 at 3:00 p.m. EST</b> Jacksonville Housing Authority 1300 Broad Street N. Jacksonville, FL 32202

**REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard**

**1.0 JHA’S RESERVATION OF RIGHTS:** The Agency reserves the right to:

- 1.1 Right to Reject, Waive, or Terminate the RFP.** Reject any or all proposals, to waive any informality in the RFP process, or to terminate the RFP process at any time, if deemed by the Agency to be in its best interests. The JHA reserves the right to amend, suspend, terminate, or reissue this RFP in whole or in part, at any stage.
- 1.2 Right to Not Award.** Not award a contract pursuant to this RFP, to award by individual service, group of services, or as a total, whichever is deemed most advantageous to the JHA
- 1.3 Right to Terminate.** Terminate a contract awarded pursuant to this RFP, at any time for its convenience upon 10 days written notice to the successful proposer(s).
- 1.4 Right to Determine Time and Location.** Determine the days, hours, and locations that the successful proposer (hereinafter, “Contractor”) shall provide the services called for in this RFP.
- 1.5 Right to Retain Proposals.** Retain all proposals submitted and not permit withdrawal for a period of 60 days subsequent to the deadline for receiving proposals without the written consent of the JHA’s Contracting Officer (CO).
- 1.6 Right to Negotiate.** Negotiate the fees proposed by the proposer entity
- 1.7 Right to Reject Any Proposal.** Reject and not consider any proposal that does not meet the requirements of this RFP, including, but not necessarily limited to incomplete proposals and/or proposers offering alternate or non-requested services
- 1.8 No Obligation to Compensate.** Have no obligation to compensate any proposer for any costs incurred in responding to this RFP, including but not limited to, any and all cost of preparing a response to the RFP or any other costs incurred in reliance on this RFP.
- 1.9 Right to Prohibit.** At any time during the RFP or contract process, prohibit any further participation by a proposer or reject any proposal submitted that does not conform to any of the requirements detailed herein. By accessing the Housing Agency Marketplace website at [ha.internationaleprocurement.com](http://ha.internationaleprocurement.com) (hereinafter, the “Housing Agency Marketplace” or the “Marketplace”) and by downloading this document, each prospective proposer is thereby agreeing to abide by all terms and conditions listed within this document and within the Marketplace, and further agrees that he/she will inform the CO in writing within 5 days of the discovery of any item listed herein or of any item that is issued thereafter by the Agency that he/she feels needs to be addressed. Failure to abide by this timeframe shall relieve the Agency, but not the prospective or actual proposer, of any responsibility pertaining to such issue.
- 1.10 Right to Reject – Obtaining Competitive Solicitation Documents.** The Marketplace is the only official and appropriate venue to obtain the competitive solicitation documents (and any other information pertaining to the competitive solicitation such as addenda). Accordingly, by submitting a response to this competitive solicitation the respondent thereby affirms that he/she obtained all information on the Marketplace located at [ha.internationaleprocurement.com](http://ha.internationaleprocurement.com). Any other group, such as a proposal depository that informs potential respondents of the availability of such competitive solicitations, are hereby instructed to not distribute these documents to any such potential respondents, but to instruct the potential

## REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard

respondents to visit the Marketplace to obtain the documents. The Agency will reject without consideration any response submitted from a firm that has not obtained the documents from the Marketplace.

**2.0 SCOPE OF WORK/TECHNICAL SPECIFICATIONS.** The JHA is seeking proposals from qualified, licensed, and insured entities to provide the following detailed services:

### **2.1 Description of Services**

Contractor shall furnish all labor, materials, and equipment necessary to conduct a Physical Needs Assessment (PNA) and Energy Audit (EA) of JHA properties where and when directed and as specified herein in accordance with all current HUD regulations, the HUD PNA software (“tool”), forms, user guide, and other guidance which will be utilized as a guideline for this PNA.

Contractor shall collect, format, and report the data with the PNA in a manner compatible with the JHA’s asset management system. This system forms the basis to develop JHA’s capital improvement plan as part of the budget process and to determine the cost of deferred maintenance for current assets. The Contractor shall complete a PNA that reflects an assessment of the condition of 1,682 units owned by the JHA as listed in Attachment A4. All listed properties are the subject of the PNA, and EA are to include both dwelling and non- dwelling spaces and buildings as well as roads, walks, walls and fences, parking areas and other site features contained within each project.

### **2.2 General Requirements**

Contractor shall comply with all applicable federal, state, and local laws, rules, regulations, ordinances, and codes and obtain any licenses or permits required to provide the services under this RFP. General Requirements in accordance with the PNA Physical Needs Assessment compliance requirements found in 24 CFR 905.300 and 24 CFR 968.315(e)(2), the Contractor shall provide a full range of services including evaluating the existing conditions of the housing stock based upon a representative sample selection of buildings, units, common areas, and other JHA physical facilities. All identified physical improvements will meet or exceed HUD mandatory standards, and those established by State of Florida health, safety, and building codes. Contractor shall identify and provide a description of all physical improvements that will be required to bring the property back to a level comparable with “as-built,” to the degree reasonably possible based on available components and building age. The effort must provide the JHA with the information necessary to ensure long-term physical viability and in a manner suitable for planning and budgeting purposes.

## REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard

- 2.2.1** Identify deficient conditions, such as those that result from deferred maintenance, and building and life safety code noncompliance or obsolescence issues.
- 2.2.2** Subject to JHA direction, perform interviews and review existing property documentation with knowledgeable JHA staff, including building plans, building histories, prior assessments and energy audits, maintenance records.
- 2.2.3** Identify all development components that will be part of the assessment.
- 2.2.4** Establish a methodology that will sample multiple like-kind buildings, and common areas such as lobbies, corridors, and community facilities.
- 2.2.5** Utilize the HUD PNA tool which provides a general list of potential components to be assessed. Generally, components to be assessed are those for which replacement represents a significant capital cost. The HUD list is not all inclusive and may not include significant components that will need assessment.
- 2.2.6** Perform walkthrough assessment/inspections of each development and other JHA properties to ascertain the condition of the property; immediate critical and non-critical needs; general code compliance; expected repair, replacement, and major refurbishment needs; and total estimated cost to complete such items.
- 2.2.7** Make on-site assessments sufficient to establish the type and approximate extent of existing or potential deficiencies to include identifying items whose useful life may have been extended with effective routine maintenance including an estimated annual cost for routine maintenance for these items.
- 2.2.8** The assessor will develop an electronic/digitized Data Collection Form that:
  - 2.2.8.1** Combines the HUD PNA approved data collection form “HUD Physical Needs Assessment Form”- Appendix III and “ASTM Uniformat II Classification for Building Elements (E1557-97)”- Appendix IV, into a single survey instrument.
  - 2.2.8.2** Enables differentiation between property types in the same property using the HUD defined property types of: (1) single family/duplex; 2) row house; 3) walk-up; and 4) elevator.
  - 2.2.8.3** Used for the following: site, building exterior, building systems, unit, and common areas.
  - 2.2.8.4** Collects and reports all data and populate inputs into a database management system to be approved by the JHA in advance.
- 2.2.9** Identify work necessary to comply with federal and State of Florida requirements and codes, such as elimination of asbestos/lead and new energy code compliance.
- 2.2.10** Provide and record an estimate of Expected Useful Life (EUL) for each individual component and provide a source for EUL in general.

**REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard**

- 2.2.11** Take and record representative measurements and quantity count to estimate the cost to remedy deficiencies. Provide and record a replacement unit cost for each individual component and for a total of those components. (E.g., per window and per window times all similar windows.)
- 2.2.12** Identify work items needed and costs for implementation to make selected units accessible and usable by the handicapped as required by Section 504 of the Rehabilitation Act of 1973. This will include costs to retrofit a specific number of dwelling units to meet Section 504 requirements for persons with disabilities. Each area that is designated as part of Section 504 or Americans with Disabilities Act (ADA) requirements will be inspected to ensure that the components are functioning according to their purpose.
- 2.2.13** Identify any deficiencies that could have an impact on health and safety and bring them to the attention of the JHA immediately by written and verbal notification as a matter of ensuring the safety of residents and JHA personnel.
- 2.2.14** Develop a Comprehensive Costing Library utilizing a professional / certified cost estimating solution such as “R.S. Means” construction costing to build a comprehensive cost and EUL component library. The comprehensive cost and EUL component library are vital to using the HUD PNA Tool and must contain descriptions and reference information.
- 2.2.15** Organize recommendations and associated estimates of cost in ASTM Uniformat II Classification for Building Elements Assessment Standards and Requirements Contractor shall conduct PNA on units, properties, facility systems and improvements specified by the JHA in accordance with the Department of Housing and Urban Development's (HUD) governing property standards and Industry Standard Assessment Protocols to collect, format and report data required to perform the PNA Report. The Contractor shall:
- 2.2.15.1** Use a HUD tool that can be found at the following HUD website address  
[http://portal.hud.gov/hudportal/HUD?src=/program\\_offices/public\\_indian\\_housing/programs/ph/capfund/gpnatool](http://portal.hud.gov/hudportal/HUD?src=/program_offices/public_indian_housing/programs/ph/capfund/gpnatool) .  
The work performed by the Contractor under this solicitation must be in compliance with the proposed regulations as known at the time of this solicitation. Contractors shall ensure that data collected under this solicitation include all information required under the proposed rule and are sufficient to enter into the PNA tool. The Contractor shall include in its price all costs to complete the HUD PNA tool, as required.
- 2.2.15.2** Utilize trained, qualified, and experienced assessment personnel in the assessment of multifamily and public housing facilities using industry standard protocols.

**REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard**

- 2.2.15.3** Include unit interiors, building systems, common areas, building exteriors, equipment, drainage, landscaping, and other improvements at all developments specified properties specified by the JHA.
- 2.2.15.3** Establish a plan to inspect the following:
  - 2.2.15.3.1** The greater of a) 20 percent of all apartment interiors (a combination of vacant and occupied units) or b) three (2) apartment interiors, per building on multiple building sites. Apartment interiors shall be selected such that they provide a representative sample of the location, size, type, etc. of units within each building (i.e. corner units, top floor units, ground floor units, subterranean units).
  - 2.2.15.3.2** 100 percent of vacant units at all sites.
  - 2.2.15.3.3** 100 percent of interior common areas.
  - 2.2.15.3.4** 100 percent of all building systems and exteriors, including roofs, HVAC, boilers, etc.
  - 2.2.15.3.5** 100 percent of all site components (including, but not limited to walks, parking, drives, landscape, retaining walls, play areas, and fencing).

The PNA requires a minimum sample of 20 percent of all the Buildings in each Building Set and a minimum sample of 10 percent of the Units of each Unit type be inspected, which-in many, but not all cases- will result in a statistically valid sample. Under those provisions, the inspector is required to inspect a sufficient sample of each unit type, building, and property systems (e.g., HVAC, roof) to be able to state with confidence the present and probable future condition of the total property (i.e., a statistically valid sampling). This requires observing a sufficient number of units and common areas in each building and each variation of building and/or unit type. Factors which must be considered in determining a statistically valid sample include building age (including various development phases within the same project); building type, building construction materials; unit type (e.g., studio, 1-bedroom); unit size within type (e.g., 512 sq. ft. 1-bedroom vs. 730 sq. ft. 1-bedroom); unit occupancy (e.g., elderly, handicapped, family); unit equipment or amenities within unit equipment that are not tenant owned. Consider the following conditions when determining your inspection sample. At least one of each type of unit (by bedroom count as well as by configuration) must be inspected even if that results in a Set containing only 1 unit. For example, a building may have some three-bedroom units that have a second bath that would make them different. Units with characteristics potentially affecting condition need to be included in the sample, such as top-floor, ground-floor units, or end units. You may need to expand the inspection sample in cases where units are not reasonably uniform in their condition. For



**REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard**

example, you might have a percentage of your units that have renovated kitchens and a remainder that is not renovated. Your sample needs to reflect that proportion.

If the difference in " configuration" is simply that of the floor plan, and the square footage is nearly the same (plus or minus 10%), but the appliances, equipment, windows, flooring, doors, etc., are of the same age and materials, then the two configurations can be treated as one Set of 3-bedroom unit- at least 10 percent of this Set of 3-bedroom unit should be inspected. If the different configuration results in significant other changes (e.g., townhouse versus flat; different number of bathrooms; different types of HVAC systems; etc.), then they should be treated as different unit types and thus a minimum of 10 percent of each type (Set configuration) should be inspected and included in the PNA.

**2.2.15.4** Each project site must be inspected in its entirety. A single building on a site would be inspected in its entirety on the exterior. On projects with multiple buildings, a minimum of 10 percent of the buildings should be inspected in each Building Set; in the case where the buildings are essentially identical, of the same age, and similar condition. This percentage of buildings and Building Sets to inspect will increase much in the way the unit sample size increases (based on consideration of significant building characteristics.)

**2.2.15.5** The JHA will issue notice to the residents informing them of the survey and the date(s) they will be conducted. The JHA will also advise the residents that the surveys will occur whether they are home or not if entrance into their apartment is scheduled.

**2.2.15.6** The reports for each development survey, including all deficiencies, shall be submitted to the JHA after completion of each development's inspection in order to facilitate and expedite corrective measures by the JHA. The Contractor shall provide digital pictures of deficiencies with each report. The photographs shall at a minimum include:

**2.2.15.6.1** View of Subject from "curb"

**2.2.15.6.2** Representative elevations

**2.2.15.6.3** Significant or commonly encountered interior and exterior physical deficiencies'

**2.2.15.6.4** Main entrance hallways

**2.2.15.6.5** Roof Areas

**2.2.15.6.6** Parking facilities/pavement

**2.2.15.6.7** On-site maintenance and storage facilities, if applicable.

**2.2.15.7** Contractor is to provide all necessary computers, software, cameras, personnel, uniforms, vehicles, fuels etc. necessary

**REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard**

to conduct and complete the inspections as specified herein. The inspections shall be sufficient to prepare a report that:

- 2.2.15.7.1** Identifies significant defects, deficiencies, items of deferred maintenance, material code violations, and physical deficiencies.
- 2.2.15.7.2** Provides estimated costs to remedy the faults or deficiencies.
- 2.2.15.7.3** Provides a replacement schedule for major building systems with recommended annual funding to be set aside over a ten (10) year term for each property. This schedule must include an estimate of the remaining useful life of these building systems.
- 2.2.15.7.4** The final report must include the Contractor's written opinion of the overall physical and operational condition of the property and also, identifies the specific physical deficiencies and conditions which will limit the expected useful life of major systems and components and improvements and provide an estimated cost to remedy each deficiency. This report will also provide a recommendation for annual Replacement Reserve Expenditures over the next ten years, by property.
- 2.2.15.7.5** Contractor shall provide guidance and support for “sustainable” designs and retrofits, including alternative and renewable energy options. These initiatives must be reasonable and cost effective. Estimates must reflect installation of new systems, appliances, etc. that meet the Build SA Green Level II. Contractor shall also provide information and technical advice to the JHA concerning sustainability practices, carbon footprint and greenhouse gas management, certification systems such as Energy Star, and Watersense.
- 2.2.15.7.6** Provide a comprehensive needs assessment in compliance with Section 504 of the Rehabilitation Act of 1973 (24 CFR 8) for the entire JHA portfolio. Assessment must include the design and construction requirements of the Fair Housing Act (24 CFR 100) and the Uniform Federal

**REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard**

Accessibility Standards (UFAC) 24 CFR 8.32 and Appendix A to 24 CFR 40, as applicable, for mobility and visual/hearing impairment accessibility. The assessment must also include specific information of non-compliant features of any common area or unit, so that corrective action may be taken. The JHA will provide a list of units per property that have been designated as 504 (mobility and visual/hearing.)

**2.2.15.8** Contractor shall replace any personnel that the JHA determines to be unacceptable no later than the start of the next business day after notification and shall not permit unacceptable personnel to return to any JHA property or further utilize them during the term of the contract including any extensions.

**2.2.15.9** Contractor may assume timely and complete access to each property, JHA staff, vendors, and available owner documents.

**2.2.15.10** The assessment shall consist of a survey only of the property, components, systems, and elements that are easily visible and readily accessible. No intrusions, sampling, boring or disassembly of any components, systems or infrastructure is required unless specifically requested by the JHA.

**2.2.15.10.1** The Contractor shall make a reasonable effort or attempt at discovery of existing or developing deficiencies.

**2.2.15.10.2** The Contractor shall perform a “walk around” survey.

**2.2.15.10.3** The Contractor shall operate equipment, fixtures and systems normally operated by residents to determine operability and/or operating characteristics in every unit that is inspected.

**2.2.15.10.4** The Contractor shall note material building code violations of items, systems, or inherent design that are readily apparent and discernable.

**2.2.15.10.5** Note material building code violations of items, systems, or inherent design flaws that are readily apparent and discernable.

**2.2.15.10.6** Take measurements and system counts to adequately justify the estimated costs to remedy the reported deficiencies and to

estimate the Replacement Reserve Expenditures.

**2.2.15.10.7** The Contractor shall substantiate the basis for these costs in the reports. Document Review: The Contractor shall review property records and studies as furnished by the JHA. In general, document information will consist primarily of JHA supplied leasing literature, possibly drawings (as built, if available), historical receipts for repairs and/or improvements, pending proposals for repairs and replacements, schedule of operating expenses, etc. There may also be previously prepared building condition survey reports, appraisals, and ADA survey, etc. that may be provided to the Contractor as well. Should access to any or all documentation be restricted or denied to the Contractor, the Contractor is to notify Owner and report this lack of access or denial within the Report. If drawings (as built or construction) are available, they will be provided to the Contractor for Contractor's use in a determined space. These drawings shall serve as an aid to the Contractor in developing quantities for cost estimating purposes (both to remedy deficiencies and for replacement reserve calculations) and will assist Contractor in preparing descriptions of the improvements and identifying latent defects. An in-depth review of the drawings is not required under the scope of this engagement. The Contractor is required to detail obvious code compliance issues discovered during the review based upon either the drawings or the Contractor's survey and include those discrepancies in their report. A detailed code compliance review shall be proposed as a separate project with a separate cost on the Fee Proposal Sheet.

**2.2.15.11** Responsibility for Subcontractors: All requirements for the “Prime” contractor shall also apply to any and all subcontractors. It is the Prime Contractors' responsibility to ensure compliance by the subcontractors. The Prime

Contractor remains liable to the JHA for the performance and compliance of the subcontractors. Code compliance issues discovered during the review based upon either the drawings or the Contractor's survey and include those discrepancies in their report. A detailed code compliance review shall be proposed as a separate project with a separate cost on the Fee Proposal Sheet.

**2.2.15.12** Responsibility for Subcontractors: All requirements for the “Prime” contractor shall also apply to any and all subcontractors. It is the Prime Contractors' responsibility to ensure compliance by the subcontractors. The Prime Contractor remains liable to the JHA for the performance and compliance of the subcontractors.

### **2.3 Phases of Work**

Contractor shall complete assessment in three phases:

- 2.3.1** Pre-Assessment --focuses primarily on preparing for the assessment, as well as collecting and recording development data and utilizing architectural plan measurements and count data.
- 2.3.2** Assessment --focuses on helping you to identify all building components, including quantities of each present component; establish remaining useful life (RUL); and determine eligibility and cost of component refurbishment or replacement.
- 2.3.3** Post-Assessment --focuses on establishing industry-standard parallels through collection, review, data input, and report production.

### **2.4 Steps of Work**

Contractor shall complete work utilizing the following primary steps. These steps however are not all inclusive and do not limit Contractor’s responsibility for completing the work. The steps involved include, but are not limited to:

- 2.4.1** Develop a detailed survey scope and survey methodology, pertinent to the collection of all assessment data and the information required to develop the database.
- 2.4.2** Develop a detailed schedule for surveying each property.
- 2.4.3** Survey existing physical conditions at the development, including but not limited to: the roofs, envelopes, windows, landscaping, streets/parking areas, sidewalks, etc.; the building interiors, including all finishes, fixtures, materials, and equipment; all common areas, including halls, lobbies, stairwells, etc.; crawl spaces, utility tunnels, etc.; and all mechanical, electrical, plumbing, and air conditioning systems, etc.
- 2.4.4** Interview resident representatives and maintenance and management staff; collect and record all relevant data.

- 2.4.5** Based on information gathered in the steps above, analyze the condition of all systems and components at the development and identify all capital improvements or modernization necessary.
- 2.4.6** Provide cost estimates for each item of recommended improvement, including units and unit prices where applicable. Contractor shall categorize and use the correct Total Development Cost numbers for each HUD-defined property types for comparison to the cost estimates. Contractor shall evaluate which buildings meet the obsolescence threshold using the Section 18 / HUD obsolescence methodology, as described in Section 4.A.1 of Appendix IV- HUD Notice PIH 2018- 04, including the allowances identified for soft costs and contingency. Consistent with HUD guidance, cost estimates for this item must relate to work items required within the first three years.
- 2.4.7** Employ quantitative units in building the database wherever possible.
- 2.4.8** Prioritize each work item utilizing the three (3) categories of priority, as described below:
- 2.4.8.1** Priority I - Imperative (must do): Projects that cannot reasonably be postponed in order to avoid harmful or otherwise undesirable consequences. • Corrects a condition dangerous to public health or safety • Satisfies a legal obligation (law, regulation, court order, contract) • Alleviates an emergency service disruption or deficiency.
- 2.4.8.2** Priority II - Essential (must do): Projects that address clearly demonstrated needs or objectives. • Rehabilitates or replaces an obsolete public facility or attachment thereto • Stimulates economic growth and private capital investment • Reduces future operation and maintenance costs •
- 2.4.8.2** Priority III - Important (could do): Projects that benefit the community but may be delayed without detrimental effects to basic services. • Provides a new or expanded level of service. • Reduces energy consumption.
- 2.4.8.3** To allow for future updates and modifications, the Contractor shall provide the entire plan in an electronic database format to facilitate the future updating of the facilities condition evaluations.

## **2.5 PNA Report**

Upon completion of the inspections, the Contractor will provide a report to the JHA in narrative and spreadsheet forms that meets JHA's requirements, in both paper and electronic format. This requirement also includes the XML report to be generated from the PNA tool. The draft report will contain the PNA results and will be submitted to the JHA for review and comments.

The report of the PNA shall include:

## REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard

- 2.5.1** An introductory background section, summarizing the prior PNA and history; the past capital improvements; the assessment procedures, assumptions, and methods; the prioritizing system and approach; the cost-estimating methods and assumptions; and an explanation of and reference to the cost-estimating guide proposed.
- 2.5.2** A separate Physical Needs Assessment, for each asset management property/development assessed. Attach to each report color photographs and a detailed narrative describing the property's exterior and interior physical elements and condition, including architectural and structural components and mechanical systems. Include a section for the development that gives general information and descriptions of the development.
- 2.5.3** A listing of each issue of deficiency, by priority, giving at a minimum the system (HVAC, site, unit interior, etc.), a brief description of the problem, a brief recommendation, and a cost estimate.
- 2.5.4** An attachment that includes an overall listing of the recommended work items by priority, a copy of the survey form, and a listing of all the systems, components and subcomponents, and entry codes used in the database.
- 2.5.5** An Executive Summary summarizing major findings and recommendations plus any other major issues, including any repair items that immediately impact health and safety such as code violations; regulatory compliance issues such as relocation planning, asbestos-containing materials, if apparent, lead-based paint, if apparent, and environmental issues; or systematic problems. Also describe any Section 504 work items, energy conservation measures, and any environmental hazard (asbestos/lead-based paint) items.
- 2.5.6** A recommended Replacement Reserve Schedule. The Replacement Reserve Schedule is to encompass short life span (immediate-1 year), medium life span (5 years) and long-life span (10 years) recurring systems and components. Short life span recurring systems and components are typical of such items as exterior caulking, carpeting, pavement sealing and striping, domestic hot water heaters, etc. Medium life span recurring systems are typically cooling towers, paving, roofing, appliances, kitchen cabinets, etc. Long life span recurring systems are typically boilers, chillers, electrical systems, infrastructure components, supply, and drainage piping, etc. The selected Contractor will detail quantity and cost estimates to accomplish each work item, a total for each project, and a grand total to accomplish all needed physical improvements. General work category (e.g., Kitchens, Bedrooms) costing without specific work item costing is unacceptable. Provide individual cost tables and digital photographs to document notable conditions at each property. The Contractor shall show a line-item prioritization. The work shall include a review of any prior plans, recommendations, and a detailed report on items completed in the interim. The major part of the work consists of a thorough assessment of noted property, leading to a prioritized list of

recommended improvements, plus a detailed physical database. Included is the identification of work that may be recommended to improve long-term viability, such as change in physical configurations, comprehensive revitalization with total demolition, and/or disposition. All data will be entered into the HUD PNA tool, sufficient to produce a 10-year cost projection of needs for each capital component broken down by year.

## **2.6 Energy Audit (EA) Scope of Work/Technical Specifications**

Contractor shall provide the following detailed services for an Energy Audit within this Scope of Work. The assessment will identify Energy Conservation Measures (ECMs) and the cost savings that result from implementing the measures, thereby reducing operating costs. If the option for the EA is exercised, the EA is to be integrated with the PNA Report. General Requirements: The Contractor will provide a full range of services including evaluating the existing conditions of the housing stock on the basis of a physical inspection of a representative sample. (Note: The Contractor will be expected to inspect a sample size comparable to that for the PNA described above; the inspected areas for purposes of the energy audit may be, but are not required to be, the same as those inspected for the PNA.) The assessment will identify water and energy conservation measures and the cost-savings that result from implementing the measures. All identified physical improvements will meet or exceed HUD mandatory standards and those established by local and state health, safety, and building codes. The Contractor shall enter the data into the PNA tool for each ECM considered sufficient to include the ECM as an alternate item on the cost projection and to calculate a simple payback for each considered ECM. Data fields required for each ECM are the general specification of the ECM, its cost, its estimated useful life, its estimated annual water/energy consumption, the utility rate applicable to the ECM, and the water/energy consumption of the component to be replaced by the ECM if applicable. The objectives of the audits are to identify ECMs, to determine costs to implement each ECM, and to calculate the cost-savings that result from implementing the measures. Additionally, the audit must identify any compliance, health, or safety issues related to energy improvements. Each development will require conduct of a non-investment-grade energy audit and a report. HUD has published a proposed energy audit rule in the Federal Register (Public Housing Energy Audits, dated 11/17/2011) that provides standards that the Contractor shall use in the conduct of the energy audit.

The Contractor shall conduct an energy audit for each measure. The following items are specifically included:

- 2.6.1** Analyze the utility bills (list utilities used by the JHA) provided by JHA for the three (3) most recent years for all common areas (JHA paid) and units (to the extent available). The analysis shall identify trends of consumption against a benchmark(s) to support the Contractor's



- prioritization recommendations for actions such as implementing ECMs, maintenance activities, and/or resident education.
- 2.6.2** Energy walkthrough survey must include Core ECMs, which have a proven track record at reducing energy and water consumption. The Core ECMs include items related to building envelopes (e.g., insulation); heating, cooling, and other mechanical systems; water conservation; hot water systems, power, lighting systems, sensors, and controls (e.g., CFL); and appliances (e.g., ENERGY STAR).
- 2.6.3** Contractor shall evaluate whether replacement of gas or oil-fired equipment with electric equipment is practical. Such replacement shall be considered impractical if it has a simple payback over 25 years (or over the useful life of the ECM if it is less than 25 years). To the extent replacement is practical, Contractor shall treat replacement as a Core ECM. To the extent it is not practical, Contractor shall provide a written explanation for why each ECM is impractical.
- 2.6.4** Contractor shall evaluate whether renovations to achieve passive house (PHIUS+) certification of the building are practical. Such renovation shall be considered impractical if it has a simple payback over 25 years (or over the useful life of the ECM if it is less than 25 years). If such renovation is practical, then Contractor shall identify those recommended ECMs that would be part of a passive house (PHIUS+) renovation and treat as Core ECMs those additional ECMs needed to achieve such certification. To the extent such renovation is not practical, Contractor shall provide a written explanation for why it is impractical and include any assumptions used in calculating simple payback.
- 2.6.5** If roof work is to be done on a building that does not already have solar panels on its roof, then Contractor shall evaluate whether installation of solar panels is practical. If installation of solar panels is practical, then Contractor shall treat installation and necessary structural and electrical alterations as a Core ECM.
- 2.6.6** Review of all available building plans, specifications, product literature, and test and balance data to quantify building and equipment design criteria, parameters, and sizes. The review must also include architectural, mechanical, and electrical drawings and specifications for housing developments, administrative offices, and other buildings and identify whether any energy conservation measures or energy saving equipment is in use.
- 2.6.7** Collection of climatological data for the local area, to correlate energy usage to weather conditions.
- 2.6.8** Interviews of selected property, maintenance, and modernization personnel and residents to determine problem areas and concerns.
- 2.6.9** Advanced ECMs, which include advance, experimental, or difficult improvement items such as fuel conversion, conservation technologies (energy management systems), energy-generating technologies, and renewable energy systems (geothermal, solar-thermal or wind-power),

may be considered for supplemental feasibility study outside the scope of this contract.

- 2.6.10** Report Documentation or Report Preparation: The Contractor shall develop a comprehensive Energy Audit Report integrated with the PNA Report for each housing development and submit to the JHA. This report shall contain:
- 2.6.11** A summary of energy conservation measures studied and those recommended for implementation, by development.
- 2.6.12** A detailed description of each energy conservation measure, the cost to implement, the estimated annual savings that must result, and the average simple payback.
- 2.6.13** All energy-savings opportunities ranked according to their payback, by Project, starting with the quickest and ending with the longest payback. Recommendations as to the order in which the recommended energy-savings opportunities must be implemented in order to provide the JHA with a master plan of action, taking into consideration the new Building Energy Performance Standard and the ranking of the JHA below that standard and 20% energy reduction requirement by December 31, 2025.
- 2.6.14** Presentation of the interrelationships of the various energy conservation measures in a project so that the JHA understands the impact that implementing each measure has upon the other proposed measures.
- 2.6.15** All backup engineering calculations, so that the Energy Audit Report can be readily updated each year to reflect changes in the cost of energy or the cost to implement the energy-savings measures.

## **2.7 Deliverables and Timeframe**

- 2.7.1** The Contractor shall deliver the following, not later than 90 days from the effective date of the contract:
  - 2.7.2.1** A briefing, at a time, date, and place determined by the JHA, reflecting an overview of the Contractor's findings based on the completed PNA and EA. At a minimum, the Contractor shall address the overall condition of each project listed in Attachment A4 and review the HUD PNA report to be submitted to HUD.
  - 2.7.2.2** A full, bound hard copy of the results of the PNA and EA. This includes a separate report prepared for each development that includes a discussion of all building systems, photographs of representative interiors and systems, and a table showing immediate repairs and life-cycle component replacement.
  - 2.7.2.3** A copy of the PNA tool with all of PIC Data, Inspections, Master Cost Library, Replacement Needs, Refurbishment Needs, Sustainability Needs, Accessibility Needs, and Marketability Needs installed, if necessary.
  - 2.7.2.4** A demonstration of technical assistance to the JHA staff regarding future annual updates. The Contractor shall provide no less than 2

hours of training to JHA staff to instruct them in the use of the PNA tool for ongoing management and annual updating.

**2.7.2.5** The Contractor will continue to provide JHA staff with technical assistance until they are able to successfully submit the completed PNA file.

**2.7.2.6** Two (2) hard copies of each aforementioned item shall be submitted, as well as one (1) electronic copy submitted in either MS Excel or MS Word format on a “flash” or “thumbnail” drive. These documents/devices shall be the sole property of The Contractor shall not provide the documents produced for the JHA under this contract to any other party unless approved in writing by the JHA Contracting Officer.

## **2.8 Deliverables and Timeframe / Milestones**

Contractor shall establish milestones shown below for the deliverables identified. In developing the schedule of milestones, the Contractor shall provide for thirty (30) calendar days for the JHA to review, coordinate, and comment on draft deliverables. Completion date is expected to be six (6) months from the JHA’s Notice to Proceed (NTP).

**2.8.1** Physical Needs Assessment (PNA) and Energy Audit - Draft Version - Within one hundred eighty (180) days after the effective date of the NTP.

**2.8.2** Physical Needs Assessment (PNA) and Energy Audit - Within thirty (30) days after receipt of comments on the “Draft Version” of the PNA. The JHA shall provide the Contractor written comments on the draft reports within 30 days of its submission. The firm must consider any comments it receives from the JHA and incorporate such revisions and additions to the reports as requested by the JHA.

**2.8.3** Physical Needs Assessment (PNA) and Energy Audit - Projects Final Version Within thirty (60) days after receipt of comments on the “Draft Version” of the PNA.

**2.8.4** The Contractor is required to submit an itemized schedule showing milestones of the project with their response to the RFP.

The firm/team shall have the capacity and staffing to accomplish the task within the schedule.

## **2.9 Qualifications**

### **2.9.1 Physical Needs Assessment**

**2.9.1.1** State and local license as required

**2.9.1.2** At least 5 years of experience performing physical property inspections and cost estimations for PHAs; demonstrated knowledge of applicable multifamily building standards and codes;

**REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard**

demonstrated knowledge of energy-efficiency practices; and a working knowledge of commonly used computer technology (MS Excel, Access, etc.).

**2.9.2 Energy Audit**

**2.9.2.1** State and / or local license as required.

**2.9.2.2** Basic knowledge and experience to produce a useful and reliable energy audit.

**2.9.2.3** Certification (“energy auditor,” “certified energy auditor,” “certified energy manager,” “HERS Rater”) from a state or national energy auditing certifying agency. Acceptable certifications include those provided by the American Association of Energy Auditors (AEE), the Building Performance Institute (BPI), and the Residential Energy Services Network (RESNET).

It is expected that assessments of each property will be performed by teams of Architects and Engineers. The successful firm/s must demonstrate their team’s certification and knowledge of codes, including building, accessibility, fire, electric and mechanical and plumbing codes.

**3.0 PROPOSAL FORMAT:**

**3.1 Tabbed Proposal Submittal.** The Agency intends to retain the successful proposer pursuant to a “Best Value” basis, not a “Low Proposal” basis (“Best Value,” in that the Agency will, as detailed within the following Section 4.0, consider factors other than cost in making the award decision). Therefore, so that the Agency can properly evaluate the offers received, all proposals submitted in response to this RFP must be formatted in accordance with the sequence noted within the table below. Each category must be separated by numbered index dividers, which number extends so that each tab can be located without opening the proposal and labeled with the corresponding tab reference also noted below. None of the proposed services may conflict with any requirement the Agency has published herein or has issued by addendum.

**[PROPOSAL Submittal – Table No. 3]**

RFP Section	Tab No.	Description
3.1.1	1	<b>Form of Proposal.</b> This Form is attached hereto as Attachment A to this RFP document. This form must be fully completed, executed where provided thereon and submitted under this tab as a part of the proposal submittal.
3.1.1.1		<b>Entry of Proposed Fees.</b> This Form is attached hereto as Attachment A1 to this RFP document. This form must be fully completed, executed where provided thereon and submitted under this tab as a part of the proposal submittal.

**REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard**

3.1.1.2		<b>Non-Collusive Affidavit.</b> This Form is attached hereto as Attachment A2 to this RFP document. This form must be fully completed, executed where provided thereon and submitted under this tab as a part of the proposal submittal.
3.1.1.3		<b>E-Verify Affidavit.</b> This Form is attached hereto as Attachment A3 to this RFP document. The form must be fully completed, executed where provided thereon and submitted under this tab as a part of the proposal submitted.
3.1.1.4		<b>Addendums.</b> Any addendums issued must be executed and placed under this tab.
3.1.2	2	<b>Form HUD-5369-C (8/93), Certifications and Representations of Offerors, Non-Construction Contract.</b> This Form is attached hereto as Attachment B to this RFP document. This 2-page Form must be fully completed, executed where provided thereon and submitted under this tab as a part of the proposal submittal
3.1.3	3	<b>Profile of Firm Form.</b> The Profile of Firm Form is attached hereto as Attachment C to this RFP document. This 2-page Form must be fully completed, executed, and submitted under this tab as a part of the proposal submittal.
3.1.4		<b>Proposed Services.</b> The proposer shall place under this tab documentation further explaining the proposer’s services and showing how the proposer intends to fulfill the requirements of the preceding Section 2.0 herein, including, but not limited to:
3.1.4.1		As detailed within Section 4.1, Evaluation Factor No. 2, herein, the proposer’s <b>DEMONSTRATED UNDERSTANDING</b> of the <b>JHA’S REQUIREMENTS</b> .
3.1.4.2		As detailed within Section 4.1, Evaluation Factor No. 3, herein, the proposer’s <b>QUALITY</b> of the <b>TECHNICAL APPROACH</b> and the <b>SERVICES PROPOSED</b> .
3.1.4.3	4	As detailed within Section 4.1, Evaluation Factor No. 4, herein, the proposer’s <b>TECHNICAL CAPABILITIES</b> (in terms of personnel) and the <b>MANAGEMENT PLAN</b> (including the ability to provide the services detailed herein).
3.1.4.4		As detailed within Section 4.1, Evaluation Factor No. 5, herein, the proposer’s <b>DEMONSTRATED EXPERIENCE</b> in performing similar work and the proposer’s <b>DEMONSTRATED SUCCESSFUL PAST PERFORMANCE</b> (including meeting costs, schedules, and performance requirements) of contract work substantially similar to that required by this solicitation as verified by reference checks or other means.
3.1.4.5		If appropriate, how staff are retained, screened, trained, and monitored.
3.1.4.6		The proposed quality assurance program.
3.1.4.7		An explanation and copies of forms that will be used and reports that will be submitted and the method of such reports (i.e. written; fax; Internet; etc.).

**REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard**

3.1.4.8		A complete description of the products and services the firm provides.
3.1.5	5	<b>Managerial Capacity/Financial Viability/Staffing Plan.</b> The proposer entity must submit under this tab a concise description of its managerial and financial capacity to deliver the proposed services, including brief professional resumes for the persons identified within areas (5) and (6) of Attachment C, <i>Profile of Firm Form</i> . Such information shall include the proposer’s qualifications to provide the services; a description of the background and current organization of the firm (including a current organizational chart).
3.1.6	6	<b>Client Information/ References:</b> The proposer shall submit a listing of former or current clients (minimum of 3 required), including any Public Housing Authorities, for whom the proposer has performed similar or like services to those being proposed herein. The listing shall, at a minimum, include: <ol style="list-style-type: none"> <li>1. The client’s name;</li> <li>2. The client’s contact name;</li> <li>3. The client’s telephone number;</li> <li>4. A brief narrative description and scope of the service(s) and the dates the services were provided; including scope; size; cost; principal elements; and special features.</li> </ol>
3.1.7	7	<b>Equal Employment Opportunity/Supplier Diversity.</b> The proposer must submit under this tab a copy of its Equal Opportunity Employment Policy and a complete description of the positive steps it will take to ensure compliance, to the greatest extent feasible, with the regulations detailed within the following Section 3.6 herein pertaining to supplier diversity (e.g. small, minority-, and women-owned businesses).
3.1.8	8	<b>Subcontractor/Joint Venture Information (Optional Item).</b> The proposer shall identify hereunder whether or not he/she intends to use any subcontractors for this job, if awarded, and/or if the proposal is a joint venture with another firm. Please remember that all information required from the proposer under the preceding tabs must also be included for any major subcontractors (10% or more) or from any joint venture. Attachment D is included for your use, if necessary.
3.1.9	9	<b>Other Information (Optional Item).</b> The proposer may include hereunder any other general information that the proposer believes is appropriate to assist the Agency in its evaluation.
3.1.10	<b>No Information Placed under a Tab.</b> If no information is to be placed under any of the above noted tabs (especially the "Optional" tabs), please place there under a statement such as "NO INFORMATION IS BEING PLACED UNDER THIS TAB" or "THIS TAB LEFT INTENTIONALLY BLANK." DO NOT eliminate any of the tabs.	
3.1.11	<b>Proposal Submittal Binding Method.</b> It is preferable and recommended that the proposer bind the proposal submittals in such a manner that the Agency can, if needed, remove the binding (i.e. “comb-type;” etc.) or remove the pages from the cover (i.e. 3-	

**REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard**

ring binder; etc.) to make copies, and then conveniently return the proposal submittal to its original condition.

- 3.2 Entry of Proposed Fees:** The proposed fees shall be entered by the proposer and received by the JHA using the form provided in Attachment A1 and included under Tab 1 as outlined above. Such fees shall be all-inclusive of all related costs that the Contractor will incur to provide the noted services, including, but not limited to employee wages and benefits; travel to the site; clerical support; overhead; profit; licensing; insurance; materials; supplies; tools; equipment; long distance telephone calls; document copying not specifically agreed to by the Agency; etc.
- 3.3 Additional Information Pertaining to the Pricing Items:**
- 3.3.1 Quantities:** All quantities entered by the JHA herein and within are for calculating purposes only. As may be further detailed herein, the JHA does not guarantee any minimum or maximum amount of work as a result of any award ensuring from this RFP, as the JHA anticipates that the ensuing contract will be a Requirements Contract, in that the JHA shall retain one Contractor only and shall retain the right to order from that Contractor (successful proposer) any number of services the Agency requires.
- 3.3.2 Potential Escalation of Rates:** Pertaining to the ensuing contract, there shall be no escalation of the proposed costs allowed at any time during the awarded contract other than already provided for within Attachment A1 – Proposed Fees.
- 3.3.3 Prior Written Approval Required from the JHA.** Please note that the Contractor shall NOT, at any time during the ensuing contract period(s), conduct any work (i.e., certify or retain any temporary employee for the Agency) without the prior written authorization received from the designated Agency representative (this “prior written authorization” may take the form of an e-mail sent to the Contractor by the Agency and acknowledged by return e-mail by the Contractor). Failure to abide by this directive shall release the Agency of any obligation to pay the Contractor for any such work conducted without the noted prior written authorization.
- 3.3.4 No Deposit/No Retainer.** The Agency will NOT pay any deposit or retainer fees at any time as a result of award of the ensuing contract (though the Agency may consider, under certain circumstances, a reasonable and justified payment for mobilization).
- 3.4 Proposal Submission Responsibilities:** All “hard-copy” proposals must be submitted and time-stamped received in the designated JHA office no later than the submittal deadline stated herein (or within any ensuing addendum). **A total of 1 (one) original signature copy (marked "ORIGINAL") and 4 (four) exact copies marked as “COPY” of the proposal submission must be submitted.** Each of the 5 (five) separate proposal submittals shall have a cover and extending tabs and shall be placed unfolded in a sealed package and addressed to:

**Jacksonville Housing Authority  
RFP No. PS-005-22  
Attention: Colene Orsini, Procurement Supervisor  
1300 Broad Street N.  
Jacksonville, Florida 32202**

- 3.4.1 Labeling Proposal Package.** The package exterior must clearly denote the above noted RFP number and must have the proposer's name and return address. Proposals received after the published deadline will not be accepted.
- 3.4.2 Submission Conditions:** DO NOT FOLD OR MAKE ANY ADDITIONAL MARKS, NOTATIONS OR REQUIREMENTS ON THE DOCUMENTS TO BE SUBMITTED! Proposers are not allowed to change any requirements or forms contained herein, either by making or entering onto these documents or the documents submitted any revisions or additions; and if any such additional marks, notations or requirements are entered on any of the documents that are submitted to the JHA by the proposer, such may invalidate that proposal. If, after accepting such a proposal, the JHA decides that any such entry has not changed the intent of the proposal that the JHA intended to receive, the JHA may accept the proposal and the proposal shall be considered by the JHA as if those additional marks, notations or requirements were not entered on such. By downloading these documents, each prospective proposer that does so is thereby agreeing to confirm all notices that the JHA delivers to him/her as instructed, and by submitting a proposal, the proposer is thereby agreeing to abide by all terms and conditions published herein and by addendum pertaining to this RFP.
- 3.4.3 Submission Responsibilities:** It shall be the responsibility of each proposer to be aware of and to abide by all dates, times, conditions, requirements and specifications set forth within all applicable documents issued by the JHA, including the RFP document, the documents listed within the following Section 3.8, and any addenda and required attachments submitted by the proposer. By virtue of completing, signing and submitting the completed documents, the proposer is stating his/her agreement to comply with all the conditions and requirements set forth within those documents. Written notice from the proposer not authorized in writing by the CO to exclude any of the JHA requirements contained within the documents may cause that proposer to not be considered for award.
- 3.5 Proposer's Responsibilities - Contact with the JHA:** It is the responsibility of the proposer to address all communication and correspondence pertaining to this RFP process to the CO only. Proposers must not make inquiry or communicate with any other JHA staff member or official (including members of the Board of Commissioners) pertaining to this RFP. Failure to abide by this requirement may



be cause for the JHA to not consider a proposal submittal received from any proposer who has not abided by this directive.

**3.5.1 Addendums:** All questions and requests for information must be addressed in writing (via email) to the CO. The CO will respond to all such inquiries in writing by addendum to all prospective proposers (i.e. firms or individuals that have obtained the RFP Documents). During the RFP solicitation process, the CO will NOT conduct any ex parte (a substantive conversation—“substantive” meaning, when decisions pertaining to the RFP are made between the JHA and a prospective proposer when other prospective proposers are not present) conversations that may give one prospective proposer an advantage over other prospective proposers. This does not mean that prospective proposers may not call the CO, it simply means that, other than making replies to direct the prospective proposer where his/her answer has already been issued within the solicitation documents, the CO may not respond to the prospective proposer’s inquiries but will direct him/her to submit such inquiry in writing so that the CO may more fairly respond to all prospective proposers in writing by addendum.

**3.6 Proposer’s Responsibilities — Equal Employment Opportunity and Supplier Diversity.** Both the Contractor and the Agency have, pursuant to HUD regulation, certain responsibilities pertaining to the hiring and retention of personnel and subcontractors.

**3.6.1** Within **2 CFR §200.321** it states: Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms.

**3.6.1.1** The non-federal entity must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

**3.6.1.3** Affirmative steps must include:

**3.6.1.3.1** Placing qualified small and minority businesses and women's business enterprises on solicitation lists;

**3.6.1.3.2** Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;

**3.6.1.3.3** Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority business, and women's business enterprises;

**3.6.1.3.4** Establishing delivery schedules, where the requirement permits, which encourage

participation by small and minority business, and women's business enterprises;

**3.6.1.3.5** Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and

**3.6.1.3.6** Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (1) through (5) of this section.

**3.6.2** Within **HUD Procurement Handbook 7460.8 REV 2** it states:

**3.6.2.1 Section 15.5.A, Required Efforts.** Consistent with Presidential Orders 11625, 12138, and 12432, the JHA shall make every effort to ensure that small businesses, MBEs, WBEs, and labor surplus area businesses participate in JHA contracting.

**3.6.2.2 Section 15.5.B, Goals.** The JHA is encouraged to establish goals by which they can measure the effectiveness of their efforts in implementing programs in support of Section 3 and contracting with disadvantaged firms. It is important to ensure that the means used to establish these goals does not have the effect of limiting competition and should not be used as mandatory set-aside or quote, except as may otherwise be expressly authorized in regulation or statute. Some localities have adopted minority contracting set-aside policies or geographic limitations, which may be in conflict with Federal requirements for full and open competition.

**3.6.3** Within the JHA's **Agency Procurement Policy - Section 16** it states that our Agency will:

**3.6.3.1 Provide assistance to Small and Other Business, Required Efforts:**

**3.6.3.1.1** Including such firms, when qualified, on solicitation mailing lists;

**3.6.3.1.2** Encouraging their participation through direct solicitation of proposals or proposals whenever they are potential sources;

**3.6.3.1.3** Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by such firms;

- 3.6.3.1.4** Establishing delivery schedules, where the requirement permits, which encourage participation by such firms;
- 3.6.3.1.5** Using the services and assistance of the Small Business Administration, and the Minority Business Development Agency of the Department of Commerce;
- 3.6.3.1.6** Including in contracts, to the greatest extent feasible, a clause requiring contractors, to provide opportunities for training and employment for lower income residents of the project area and to award subcontracts for work in connection with the project to business concerns which provide opportunities to low-income residents, as described in 24 CFR Part 135 (so-called Section 3 businesses); and
- 3.6.3.1.7** Requiring prime contractors, when subcontracting is anticipated, to take the positive steps listed above.

**3.6.4 Requirements.** Accordingly, please see Section 3.1.7 within Table No. 3 herein which details the information pertaining to this issue that the proposer must submit in response to this proposal showing compliance, to the greatest extent feasible, with these regulations.

- 3.7 Pre-Proposal Conference:** The scheduled pre-proposal conference identified on Table 2 of this document, pursuant to HUD regulation, is not mandatory but highly suggested. Many prospective proposers have previously responded to an RFP with a multi-tabbed submittal and feel comfortable in doing so without attending the pre-conference. Typically, such conferences last 1 hour or less, though such is not guaranteed. The purpose of this conference is to assist prospective proposers to have a full understanding of the RFP documents so that he/she feels confident in submitting an appropriate proposal; therefore, at this conference the JHA will conduct a brief overview of the RFP documents, including the attachments. Prospective proposers may also ask questions, though the CO may require that some such questions are delivered in writing prior to a response being delivered. Whereas the purpose of this conference is to review the RFP documents, attendees should bring a copy of the RFP documents to this conference; the JHA *will not* distribute any copies of the RFP documents at this conference.
- 3.8 Recap of Attachments:** It is the responsibility of each proposer to verify that he/she has downloaded the following attachments pertaining to this RFP, which are hereby by reference included as a part of this RFP:

**REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard**

[Attachment Recap - Table No. 4]

Attachment Recap		
RFP Section	Attachment	Attachment Description
3.8.1		This RFP Document
3.8.2	A	Form of Proposal
3.8.2.1	A1	Proposed Fees
3.8.2.2	A2	Non-Collusive Affidavit
3.8.2.3	A3	Florida E-Verify Affidavit
3.8.2.4	A4	JHA Site Locations
3.8.3	B	Form HUD-5369-C (8/93), <i>Certifications and Representations of Offerors, Non-Construction Contract</i>
3.8.3.1	B1	Form HUD-5369-B (8/93), <i>Instructions to Offerors Non-Construction</i>
3.8.3.2	B2	Form HUD-5370-C Section 1 <i>General Conditions for Non-Construction Contracts – Section 1 – (With or without Maintenance Work)</i>
3.8.4	C	Profile of Firm Form
3.8.5	D	Subcontractor List
3.8.6	E	Section 3 Explanation
3.8.7	F	<i>Agency Supplemental Instructions To Proposers &amp; Contractors (SIPC)</i>
3.8.8	G	JHA Sample Contract Form (please note: the contract is being provided as a sample only. The JHA reserves the right to revise any clause herein and/or to include within the ensuing contract any additional clauses that the JHA feels it is in its best interests)

**4.0 PROPOSAL EVALUATION:**

**4.1 Evaluation Factors.** The following factors will be utilized by the Agency to evaluate each proposal submittal received; award of points for each listed factor will be based upon the documentation that the proposer submits within his/her proposal submittal:

[Evaluation Factors - Table No. 5]

Factor No.	Max Point Value*	Factor Type*	Factor Description*
1	5 points	Objective	The <b>PROPOSED COSTS</b> submitted by the proposer.
2	20 points	Subjective (Technical)	The proposer's <b>DEMONSTRATED UNDERSTANDING</b> of the <b>AGENCY'S REQUIREMENT</b> .
3	20 points	Subjective (Technical)	The <b>QUALITY</b> of the <b>TECHNICAL APPROACH</b> and the <b>SERVICES PROPOSED</b> .

**REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard**

<b>4</b>	<b>20 points</b>	<b>Subjective (Technical)</b>	The proposer's <b>TECHNICAL CAPABILITIES</b> (in terms of personnel) and the <b>MANAGEMENT PLAN</b> (including the ability to provide the services detailed herein).
<b>5</b>	<b>30 points</b>	<b>Subjective (Technical)</b>	The proposer's <b>DEMONSTRATED RELEVANT EXPERIENCE</b> in performing similar work and the proposer's <b>DEMONSTRATED SUCCESSFUL PAST PERFORMANCE</b> (including meeting costs, schedules, and performance requirements) of contract work substantially similar to that required by this solicitation as verified by reference checks or other means. (NOTE: The Agency will place particular emphasis on the proposer's above described EXPERIENCE and PAST PERFORMANCE with Public Housing- and HUD-related work).
<b>6</b>	<b>5 points</b>	<b>Subjective (Technical)</b>	The <b>OVERALL QUALITY, ORGANIZATION,</b> and <b>PROFESSIONAL APPEARANCE</b> of the <b>PROPOSAL SUBMITTED</b> , based upon the opinion of the evaluators.
	<b>100 points</b>	<b>Total Points (other than preference points)</b>	
<b>*NOTE: Points will be awarded for each Subjective Factor by each of the appointed evaluation committee members based on his/her opinion after a thorough review of the information submitted by each proposer within his/her proposal.</b>			

**4.2 Evaluation Method.**

**4.2.1 Initial Evaluation for Responsiveness.** Each proposal received will first be evaluated for responsiveness (i.e. meets the minimum of the requirements).

**4.2.2 Evaluation Packet.** An evaluation packet will be prepared for each evaluator, including the following documents:

- 4.2.2.1** Instructions to Evaluators;
- 4.2.2.2** Proposal Tabulation Form;
- 4.2.2.3** Written Narrative Form for each proposer;
- 4.2.2.4** Recap of each proposer's responsiveness;
- 4.2.2.5** Copy of all pertinent RFP documents.

**4.2.3 Evaluation Committee.** The Agency anticipates that it will select a minimum of a three-person committee to evaluate each of the responsive "hard copy" proposals submitted in response to this RFP. PLEASE NOTE: No proposer shall be informed at any time during or after the RFP process as to the identity of any evaluation committee member. If, by chance, a proposer does become aware of the identity

**REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard**

of such person(s), he/she SHALL NOT make any attempt to contact or discuss with such person anything related to this RFP. As detailed within Section 3.5 of this document, the designated CO is the only person at the Agency that the proposers shall contact pertaining to this RFP. Failure to abide by this requirement may (and most likely will) cause such proposer(s) to be eliminated from consideration for award.

**4.2.4 Evaluation.** The CO will evaluate and award points pertaining to Evaluation Factors No. 1 (the “Objective” Factor). The appointed evaluation committee, independent of the CO or any other person at the Agency, shall evaluate the responsive proposals submitted and award points pertaining to Evaluation Factors No. 2, 3, 4, 5 and 6 (the “Subjective” Factors). Upon final completion of the proposal evaluation process, the evaluation committee will forward the completed evaluations to the CO.

**4.2.4.1 Points Awarded Range.** Pertaining to the Subjective Factors, please note the following range of points awarded (points pertaining to this RFP are shaded—please also see the Evaluation Factors detailed within the preceding Section 4.1):

**[Points Awarded Range - Table No. 6]**

<b>Points Awarded Range</b>				
<b>Classification*</b>	<b>Rating</b>	<b>%</b>	<b>10</b>	<b>100**</b>
<b>Acceptable</b>	<b>Excellent</b>	<b>95%/+</b>	<b>10</b>	<b>95-100</b>
<b>Acceptable</b>	<b>Very Good</b>	<b>90%/+</b>	<b>9</b>	<b>90-94</b>
<b>Potentially Acceptable</b>	<b>Good</b>	<b>80%/+</b>	<b>8</b>	<b>80-89</b>
<b>Potentially Acceptable</b>	<b>Average</b>	<b>70%/+</b>	<b>7</b>	<b>70-79</b>
<b>Unacceptable</b>	<b>Poor</b>	<b>&lt;70%</b>	<b>0-6</b>	<b>0-69</b>
<p><b>*Pursuant to Section 7.2.N.3 of HUD Procurement Handbook 7460.8 REV 2.</b></p> <p><b>**Total available points to be awarded, including cost points, minus preference points.</b></p>				

**4.2.5 Potential "Competitive Range" or “Best and Finals” Negotiations.** The Agency reserves the right to, as detailed within Section 7.2.N through Section 7.2.R of HUD Procurement Handbook 7460.8 REV 2, conduct a “Best and Finals” Negotiation, which may include oral interviews, with all firms deemed to be in the competitive range. Any firm deemed not to be in the competitive range shall be notified of such in writing by the Agency in as timely a manner as possible, but in any case within no longer than 10 days after the beginning of such negotiations with the firms deemed to be in the competitive range.

**4.2.6 Determination of Top-ranked Proposer.** Typically, the subjective points awarded by the evaluation committee will be combined with the objective points awarded by the CO to determine the final rankings, which is typically forwarded by the CO to the ED for approval. If the

## REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard

evaluation was performed to the satisfaction of the ED, the final rankings may be forwarded to the Housing Authority Board of Commissioners (BOC) at a scheduled meeting for approval. Contract negotiations may, at the Agency's option, be conducted prior to or after the BOC approval.

**4.2.6.1 Minimum Evaluation Results.** To be considered to receive an award a proposer must receive a total calculated average of at least 70 points (of the 100 total possible points detailed within Section 4.1 herein).

**4.2.6.2 Ties.** In the case of a tie in points awarded, the award shall be decided as detailed within Section 6.12.C of HUD Procurement Handbook 7460.8 REV 2, by “drawing lots or other random means of selection.”

**4.2.7 Notice of Results of Evaluation.** If an award is completed, all proposers will receive by e-mail a Notice of Results of Evaluation. Such notice shall inform all proposers of:

**4.2.7.1** Which proposer received the award;

**4.2.7.2** Where each proposer placed in the process as a result of the evaluation of the proposals received;

**4.2.7.3** The cost or financial offers received from each proposer;

**4.2.7.4** Each proposer’s right to a debriefing and to protest.

**4.2.7 Restrictions.** All persons having familial (including in-laws) and/or employment relationships (past or current) with principals and/or employees of a proposer entity will be excluded from participation on the Agency evaluation committee. Similarly, all persons having ownership interest in and/or contract with a proposer entity will be excluded from participation on the Agency evaluation committee.

### **5.0 CONTRACT AWARD:**

#### **5.1 Contract Award Procedure:**

If a contract is awarded pursuant to this RFP, the following detailed procedures will be followed:

**5.1.1** By completing, executing, and submitting the Form of Proposal, Attachment A, the proposer is thereby agreeing to “abide by all terms and conditions pertaining to this RFP as issued by the JHA, either in hard copy or on the noted Internet System, including an agreement to execute the attached Sample Contract form.” The contract clauses already attached as Attachments B1 through B2, also apply. Accordingly, the JHA has no responsibility to conduct after the submittal deadline any negotiations pertaining to the contract clauses

already published; and in any case the JHA has no power or authority to negotiate any clauses contained within any attached HUD documents.

**5.2 Contract Conditions:**

The following provisions are considered mandatory conditions of any contract award made by the JHA pursuant to this RFP:

**5.2.1 Contract Form:** The JHA will not execute a contract on the successful proposer's form- contracts will only be executed on the JHA form (please see the Sample Contract on Attachment G and the Supplemental Instructions in Attachment F), and by submitting a proposal the successful proposer agrees to do so (please note that the JHA reserves the right to amend this form as the JHA deems necessary). However, the JHA will during the RFP process (prior to the submittal deadline) consider any contract clauses that the proposer wishes to include therein and submits in writing a request for the JHA to do so; but the failure of the JHA to include such clauses does not give the successful proposer the right to refuse to execute the JHA's contract form. It is the responsibility of each prospective proposer to notify the JHA, in writing, prior to submitting a proposal, of any contract clause that he/she is not willing to include in the final executed contract and abide by. The JHA will consider and respond to such written correspondence, and if the prospective proposer is not willing to abide by the JHA's response (decision), then that prospective proposer shall be deemed ineligible to submit a proposal.

**5.2.1.1 HUD Forms.** Please note that the JHA has no legal right or ability to (and will not) at any time negotiate any clauses contained within ANY of the HUD forms included as a part of this RFP.

**5.2.2 Unauthorized Sub-Contracting Prohibited:** The successful proposer shall not assign any right, nor delegate any duty for the work proposed pursuant to this RFP (including, but not limited to, selling or transferring the contract) without the prior written consent of the CO. Any purported assignment of interest or delegation of duty, without the prior written consent of the CO shall be void and may result in the cancellation of the contract with the JHA, or may result in the full or partial forfeiture of funds paid to the successful proposer as a result of the proposed contract; either as determined by the CO.

**5.2.3 Assignment of Personnel:** The JHA shall retain the right to demand and receive a change in personnel assigned to the work if the JHA believes that such change is in the best interest of the JHA and the completion of the contracted work.

**5.2.4 E-Verify.** In accordance with Chapter 2020-149, Laws of Florida, the Contractor confirms that it does not currently, and will not in the future,



**REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard**

employ, contract with, or subcontract with unauthorized aliens and that it has registered accordingly with the E-Verify platform. Contractor acknowledges that any violation with the aforementioned will result in a default to this contract and the JHA shall be entitled to any and all relief available, including but not limited to, consequential damages, rebate of fees, costs, and expenses, etc., resulting from the voiding of this contract.

- 5.3 Contract Period:** The Agency anticipates that it will award a contract for the period it takes to complete the requirements of this RFP.
- 5.4 Licensing and Insurance Requirements:** Prior to award (but not as a part of the proposal submission) the *successful proposer* will be required to provide:
  - 5.4.1 Workers Compensation Insurance.** An original certificate evidencing the proposer's current industrial (worker's compensation) insurance carrier and coverage amount;
  - 5.4.2 General Liability Insurance.** An original certificate evidencing General Liability coverage, naming the JHA as an additional insured, together with the appropriate endorsement to said policy reflecting the addition of the JHA as an additional insured under said policy (minimum of \$1,000,000 each occurrence, general aggregate minimum limit of \$1,000,000, together with damage to premises and fire damage of \$50,000 and medical expenses any one person of \$5,000), with a deductible of not greater than \$1,000;
  - 5.4.3 Automobile Insurance.** An original certificate showing the proposer's automobile insurance coverage in a combined single limit of \$1,000,000 for every vehicle utilized during the term of this program, when not owned by the entity, each vehicle must have evidence of automobile insurance coverage with limits of no less than \$50,000/\$100,000 and medical pay of \$5,000.
  - 5.4.4 City/County/State Business License.** If applicable, a copy of the proposer's business license allowing that entity to provide such services within the City of Jacksonville, FL, any of the counties named within the INTRODUCTION area on page 3 of the document (or, if required, within any governmental jurisdiction therein), and/or the State of Florida.
  - 5.4.5** If applicable, a copy of the proposer's license issued by the State of Florida licensing authority allowing the proposer to provide the services detailed herein.
- 5.5 Contract Service Standards:** All work performed pursuant to this RFP must conform and comply with all applicable local, state and federal codes, statutes, laws and regulations.
- 5.6 Right to Negotiate Final Fees:** The Agency shall retain the right to negotiate the amount of fees that are paid to the Contractor, meaning the fees proposed by the top-rated proposer may, at the Agency's options, be the basis for the beginning of

**REQUEST FOR PROPOSAL (RFP) No. PS-003-22, Website Dashboard**

negotiations. Such negotiations shall begin after the Agency has chosen a top-rated proposer. If such negotiations are not, in the opinion of the CO, successfully concluded within 5 business days, the Agency shall retain the right to end such negotiations and begin negotiations with the next-rated proposer. The Agency shall also retain the right to negotiate with and make an award to more than one proposer, as long as such negotiation(s) and/or award(s) are addressed in the above manner (i.e. top-rated first, then next-rated following until a successful negotiation is reached).

**5.7 Prompt Return of Contract Documents:** Any and all documents required to complete the contract, including contract signature by the successful proposers, shall be provided to the Agency within 5 business days of notification by the Agency.

**Index of Tables**

**[Index of Tables - Table No. 7]**

<b>Table</b>	<b>Description</b>	<b>Page</b>
<b>1</b>	<b>Table of Contents</b>	<b>2</b>
<b>2</b>	<b>RFP Information at a Glance</b>	<b>3</b>
<b>3</b>	<b>Tabbed Proposal Submittal</b>	<b>20-23</b>
<b>4</b>	<b>Recap of Attachments</b>	<b>28</b>
<b>5</b>	<b>Evaluation Factors</b>	<b>29</b>
<b>6</b>	<b>Points Awarded Range</b>	<b>30</b>
<b>7</b>	<b>Index of Tables</b>	<b>34</b>