**REQUEST FOR PROPOSALS**

**HOUSING AUTHORITY OF THE CITY OF LUMBERTON**

**SEPTEMBER 11, 2019**

**INTRODUCTION**

The Housing Authority of the City of Lumberton (HACL) is a duly formed public corporation created under the laws of the State of North Carolina in the business of providing affordable housing resources throughout the jurisdiction served. The Authority has reviewed the scope of work to be completed and has determined that the most advantageous procurement method is through the acceptance of competitive proposals. As a result, proposals will be received and evaluated utilizing the evaluation criteria outlined in this Request for Proposals (RFP) and **price alone is not the sole determining factor.**

The Authority is seeking the services of a qualified consultant to develop, maintain and annually update the Utility Allowances for its Section 8 Housing Choice Voucher Program in accordance with the applicable regulations issued by the U.S. Department of Housing and Urban Development (HUD). The Utility Allowances must be developed in accordance with the current regulations outlined in 24 CFR Part 965, Subpart E using the engineering calculation approach.

Firms must demonstrate their expertise and experience in providing the requested services as defined in this RFP. They must demonstrate a strong background in providing services to multifamily housing providers and specific experience with HUD programs is preferred.

**SCOPE OF SERVICES:**

**SECTION 8 HOUSING CHOICE VOUCHER PROGRAM UTILITY ALLOWANCES**

The allowances for the Authority’s Section 8 Housing Choice Voucher Program are to be developed in accordance with 24 CFR Part 982. The proposed utility allowance estimates will be developed utilizing an engineering estimate of common conditions of rental housing in the Authority’s jurisdiction. Services must include the following:

* The contractor must review information concerning the Authority, the local climate, and any special circumstances to gain and understanding of the typical rental housing in the jurisdiction.
* The contractor must develop allowances generally as follows:
* Engineering calculations will be performed based on these assumptions and the local climate.
* Climatological data for the local area will be obtained and used to correlate energy usage to weather conditions.
* Local utility rates will be collected and then will be applied to the calculation results to arrive at the utility allowances.
* Allowances will be calculated for all potential Unit types will consist of zero-through five-bedroom Duplex, Garden, High-Rise, Mobile Home, Single Family-detached, and Townhouse units.
* The contractor must present the allowances in a detailed report that includes a full explanation of the methodology used, all backup calculations, and the new allowances for each type of unit. The report will include an explanation of the methodology used to calculate the allowances and allowances for each of the following:
* Heating – Allowances for heating will be estimated using an engineering calculation and will include natural gas, electric, and propane systems.
* Cooking – Allowances for cooking that will include natural gas, electric, and propane appliances.
* Other Electric – Allowances for lighting, refrigeration, microwave, television, computer, fan, and other necessary appliances.
* Air Conditioning- Allowances for air conditioning will be estimated using an engineering calculation utilizing formulas from Modern Heating, Ventilating, and Air Conditioning.
* Water Heating- Allowances for water heating will be estimated using an engineering calculation and will include natural gas, electric, and propane units.
* Water- Allowances for water usage will be estimated using an engineering calculation and the Authority’s Voucher Payment Standards for number of occupants and current water rates
* Sewer- Allowances for sewage will be estimated based on the water allowances using current sewer rates.
* Trash Collection- Allowances of trash collection will be estimated based upon actual costs incurred by the tenant.
* Ranges and Refrigerators- Allowances for the purchase of a range or refrigerator (amortized over the life of the appliance) will be calculated in the event these are not furnished by the landlord/owner.
* Medical Equipment- Allowances for typically used medical equipment will be calculated based on the typical equipment rating to allow for the granting of an accommodation due to a disability.
* Handicap Allowances- Allowances may be developed for additional reasonable accommodations due to handicap based on discussions with the Authority.
* Allowances will be provided on Form HUD-52667 – Allowances for Tenant-Furnished Utilities and Other Services for each type of unit.
* One copy of the final report will be provided and will include the following:
* Executive Summary
* Section 8 Utility Allowance Sheets (HUD 52667)
* Methodology
* Space Heating Consumption Levels
* Air Conditioning Consumption Levels
* Cooking Consumption Levels
* Other Electric Consumption Levels
* Water Heater Consumption Levels
* Water and Sewer Consumption Levels
* Heating Formulas and Assumptions
* Back-up Calculations – Heat Load Tables
* Back-up Calculations – Domestic Water Heating Tables
* Back-up Calculation – Cooling Load Tables

**MINIMUM QUALIFICATIONS**

The firm must demonstrate the expertise and experience to complete the requested services. The firm must have a minimum of five years of experience in providing Utility Allowance Study services to multifamily housing providers and previous experience with HUD properties is preferred.

* A minimum of five (5) years of experience inspecting property and assessing the condition of building envelope and other energy-related components of multifamily housing properties. This must include experience in all areas requested under the Scope of Services.
* Evidence of certification by nationally recognized organizations (i.e. BPI, LEED, or other similar certifying or licensing agency) to assess residential building performance, conduct energy audits, or similar certification. A licensed Professional Engineer overseeing the services is preferred.
* Knowledge of applicable HUD regulations and demonstrated experience in developing Utility Allowances for multifamily housing.
* Demonstrate experience in providing the requested services to PHAs of similar size and composition within the past three years.

**PROPOSAL SUBMISSION**

Proposal should be clear and concise and structured to communicate the capabilities and experience of the firm or individual. Proposals are required to be submitted to the following no later than **4:00 p.m.** on **October 15, 2019.**

Adrian Lowery, Executive Director

Housing Authority of the City of Lumberton

Post Office Drawer 709

Lumberton, NC 28359

(910) 671-8200

Front of sealed envelope must be clearly marked: **UTILITY STUDY PROPOSAL**

Faxed or electronically submitted proposals will **NOT** be accepted. There will be no public opening of proposals. Any proposal received prior to the due date and time will be securely kept, unopened. Late proposals will be returned to the proposer unopened unless the proposer can document that a guaranteed delivery method was utilized (i.e. Federal Express) and the proposal was late due solely to the delivery company. The Authority reserves the right to reject any and all proposals and to waive any informalities whenever such rejection or waiver is deemed to be in the best interest of the Authority.

**AMENDMENTS TO OR INTERPRETATIONS OF THE RFP**

Amendments to the RFP or the Scope of Services will be issued to all firms requesting an RFP if amended. All proposers shall acknowledge the receipt of any amendment to this RFP by signing and returning the amendment and by identifying the amendment number and date on the Proposal Form. Acknowledgements may be returned by mail or by facsimile.

Questions or requests for clarifications to the RFP or the terms or the RFP shall be submitted in writing no later than five (5) calendar days prior to the proposal due date stated in this RFP to the Authority’s contact.

Responses to the questions or requests for clarifications will be provided in the form of an addendum to the RFP and will be issued to all prospective proposers. Only written amendments will be considered and no verbal interpretations or changes may be made to the terms of the RFP.

**PROPOSAL REQUIREMENTS**

Firms wishing to submit a proposal shall outline the scope of service, project approach, references, etc., to communicate the firm’s ability to provide services. Fees are requested as part of the proposal: however, the Authority reserves the right to negotiate with the selected firm and cost is not the primary determining factor in the contract award.

Proposals will be evaluated based on the firm’s ability to provide services consistent with the needs of the Authority. The Authority reserves the right to select a firm that meets their own specific needs.

**The “Awarded Firm” will have 30 days to complete the utility study.**

**Proposals must contain the following minimum information:**

*Introduction* A summary of proposal contents and overview of services to be provided.

*Scope of Services* A detailed description of services that will be provide under each area of

this request. Any information outlining the proposed approach and methodology will assist in evaluation of scope.

*Qualifications* Proposer is encouraged to submit relevant and concise information regarding its experience and qualifications to perform the requested services. A minimum of five (5) PHA references must be provided for similar work in an agency similar size. Copies of required certifications must also be provided.

*Certifications* The firm must include a Non-Collusive Affidavit, a statement of Equal Opportunity, and a Certification of Non-Debarment in all copies of the proposal. The original copy should include signed originals (and notarized), however, the copies may include copies of the original affidavit.

*Proof of Insurance* The firm shall submit proof of general liability insurance in the amount of $1,000,000 or more, proof of professional liability insurance in the amount of $1,000,000 or more, and proof of Worker’s Compensation Insurance in the amount required by law. Failure to submit the required Proof of Insurance will result in the automatic rejection of the proposal.

*Other Items* The firm is encouraged to include additional items that demonstrate their ability to provide services in accordance with the needs of the Authority.

*Fee and Payment Schedule* The proposer shall provide the total fees for the requested services. Fees shall be proposed on a flat-fee basis and shall include all travel and related expenses. Fees for the Utility Allowances shall be broken out by year.

**PROPOSAL EVALUATION CRITERIA**

THE FOLLOWING CRITERIA WILL BE UTILIZED TO RANK PROPOSALS:

Criteria Maximum Points

Firm qualifications, qualifications of principal(s) and consultant 30

qualifications, including required certifications

Approach to providing services 20

Previous experience providing the requested services to multifamily 20

Housing providers of similar size and composition

Ability to provide the proposal services in a professional and 20

timely manner

Cost of services 10

This Request for Proposal is issued this 11 day of September 2019, and represents a true and valid

request for services.