

**WESTMORELAND NON-PROFIT
HOUSING CORPORATION,
a PENNSYLVANIA NON-PROFIT**

REQUEST FOR QUALIFICATIONS (RFQ)

WILLOWBROOK COMMONS

**AFFORDABLE HOUSING -DEVELOPER/BUILDER SERVICES
WNPHC -2024.18.1.2**

**WESTMORELAND NON-PROFIT
HOUSING CORPORATION (WNPHC)**

**WILLOWBROOK COMMONS
AFFORDABLE HOUSING -
DEVELOPER/BUILDER**

**RFQ- WNPHC - 2024.18.1.2
PROPOSAL DUE:
October 4, 2024 @ 10:00 A.M. (E.S.T)**

**PROPOSAL DEPOSITORY:
WCHA - ADMINISTRATION OFFICE
167 SOUTH GREENGATE
GREENSBURG PA. 15601**

- **REVISION 1**

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INTRODUCTION:

The Westmoreland Non-Profit Housing Corporation Inc. (WNPFC) is a Non-Profit Affiliate of the Westmoreland County Housing Authority which is a public body and a body corporate and politic created under the Pennsylvania "Housing Authorities Law", for the purpose of providing affordable housing opportunities within Westmoreland County, Pennsylvania. (WNPFC) can assign the procurement over to a Limited Partnership – Owner Entity, to be formed at a later date. The (WNPFC) is seeking a qualified and experienced Developer/Builder to develop and construct a mixed financed affordable senior housing development, located in Rostraver Township, Westmoreland County, Pennsylvania 15012. The project is titled **WILLOWBROOK COMMONS**. The project funding will be primarily financed through the Pennsylvania Department Housing Finance Agency (PHFA) – Low Income Housing Tax Credit (LIHTC) Program.

Proposals will be received by registered mail, express mail or delivered to the (WNPFC)– Administration Office, located at 167 South Greengate Road, Greensburg, PA. 15601 no later than **October 4, 2024 @ 10:00 A.M.** Late arrivals will not be accepted.

All proposals submitted in response to this solicitation must conform to all of the requirements and specifications outlined within this document, addendums and any designated attachments in its entirety.

PUBLIC NOTICE:

**WILLOWBROOK COMMONS REQUEST FOR QUALIFICATIONS (RFQ)
AFFORDABLE HOUSING - DEVELOPER/BUILDER - WNPFC - 2024.18.1.2**

The Westmoreland Non-Profit Housing Corp.(WNPFC) is requesting proposals from qualified and experienced Developer/Builders to develop and construct a mixed finance affordable senior housing development. The project to be developed is a mixed financed Affordable Housing Development, located in Rostraver Township, Westmoreland County, Pennsylvania 15012. The project is titled Willowbrook Commons.

Interested respondents may obtain, at no cost, the Request for Qualifications - Documents from the WCHA-Website located at www.wchaonline.com. In addition, an electronic (PDF) file copy can be provided by contacting Mr. Erik Spiegel – COO/Director of A&E Services at eriks@wchaonline.com or by phone at 724-832-7248 – ext. 3056 or Mr. Ed Primm – Director of Development Services at eprimm@wchaonline.com or by phone at 724-832-7248 ext. 3015.

Interested respondents are required to respond by proposal submission (satisfying the requirements of this RFQ-Invitation) on or before October 4, 2004 @ **10:00 A.M.** An outdoor Pre-Proposal Meeting will occur at the site adjacent to 600 Willowbrook Plaza, Belle Vernon, PA 15012 (40°11'.8.3034"N 79°48'35.9784"W) on September 10, 2024 at 10:00 am (EST).

Michael L. Washowich, President
Westmoreland Non-Profit Housing Corp.

Advertisement Dates: Tuesday – September 3, 2024 and September 10, 2024 (Tribune Review) Wednesday, September 4, 2024 (Pittsburgh Courier); Thursday, September 5, 2024 (Mon Valley Independent)

RFQ INFORMATION AT A GLANCE:

[Table No. 2]

(WNPFC) - CONTACT PERSON	Erik Spiegel, WCHA, COO/Director of A&E Services, 724-832-7248, Ext. 3056 eriks@wchaonline.com Ed Primm, WCHA, Director of Development Services 724-832-7248, Ext. 3015 eprimm@wchaonline.com
HOW TO OBTAIN THE RFQ DOCUMENTS ON THE APPLICABLE INTERNET SITE	1. Log on to www.wchaonline.com Click on Procurement Drop Down Tab, click Current Solicitations, click See List, Log In to see list of solicitations or register if new user, click (WNPFC) – 2024-18.1.2 WILLOWBROOK COMMONS – RFQ, download documents.
PRE-SUBMISSION MEETING	1. A PRE-SUBMISSION MEETING will occur at the site location 600 Willowbrook Plaza, Belle Vernon, PA 151012 (40°11'8.3034"N 79°48'35.9784W) on September 10, 2024 @ 10:00 AM.
HOW TO FULLY RESPOND TO THIS RFQ BY SUBMITTING A PROPOSAL SUBMITTAL	1. As directed here within the RFQ document, submit all required documents within a sealed envelope labeled (WNPFC) 2024.18.1.2 WILLOWBROOK COMMONS PROPOSAL SUBMISSION – DEVELOPER-BUILDER 2. As instructed within the RFQ document, submit three copies to the (WNPFC).
PROPOSAL SUBMITTAL RETURN & DEADLINE	Proposals are due by October 4, 2024 at 10:00 am.
ANTICIPATED APPROVAL	It is anticipated the (WNPFC) will select a group to develop the project within the month of October 2024.

1.0 (WNPHC) RESERVATION OF RIGHTS:

- 1.1 The (WNPHC) reserves the right to reject any or all proposals, to waive any informality in the RFQ process, or to terminate the RFQ process at any time, if deemed by the (WNPHC) to be in its best interests.
- 1.2 The (WNPHC) reserves the right not to award a contract pursuant to this RFQ.
- 1.3 The (WNPHC) reserves the right to terminate a contract awarded pursuant to this RFQ, at any time for its convenience upon 10 days written notice to the successful group / proposer.
- 1.5 The (WNPHC) reserves the right to retain all proposals submitted and not permit withdrawal for a period of 60 days from the deadline for receiving proposals.
- 1.6 The (WNPHC) reserves the right to negotiate a Best and Final Offer with the selected group associated with all project costs and fees proposed.
- 1.7 The (WNPHC) reserves the right to reject and not consider any proposal that does not meet the requirements of this RFQ, including but not necessarily limited to incomplete proposals and/or proposals offering alternate or non-requested services.
- 1.8 The (WNPHC) will not compensate any proposer for any costs incurred in responding to this RFQ.
- 1.9 The (WNPHC) can assign the RFQ procurement over to a Limited Partnership – Owner Entity, to be formed at a later date.
- 1.10 All addendums, clarifications and additional information pertaining to this solicitation shall be posted on the Westmoreland County Housing Authority’s website www.wchaonline.com . Developer/Builders are advised to check the Westmoreland County Housing Authority’s website before submitting their proposal. WCHA assumes no responsibility for notification to potential respondents of the availability of addendums, clarifications and additional information.

2.0 PROJECT OVERVIEW:

- 2.1 **Statement of Development Purpose:** The Westmoreland County Housing Authority (WCHA), established in 1941, has a mission to provide safe, well maintained, affordable housing for families and seniors throughout Westmoreland County. WCHA provides its residents with opportunities for economic self-sufficiency and an enhanced quality of life. The WCHA is committed to furthering affordable housing opportunities within communities underserved within the County. The WCHA is actively developing opportunities and partnerships to develop and construct affordable housing within Westmoreland County.

2.2 Recent Affordable Housing Developments: The majority of the WCHA – Affordable Housing Units were constructed in the 1960’s-1980’s through HUD Public Housing and Section 8 New Construction housing programs. With a demonstrated need for additional affordable housing units within Westmoreland County, the WCHA through affiliate nonprofits have partnered to develop additional affordable housing projects within Westmoreland County within the 20 plus years. Most recently the following projects have been developed:

2012- October 2013 - South Greengate Commons, a 45-unit 3-story senior apartment building constructed within the Westmoreland County Housing Authority – South Greengate Road Campus, located at 164 South Greengate Road, Hempfield Township – Westmoreland County. The mixed finance senior housing project was funded primarily with private equity secured with the sale of Low-Income Housing Tax Credits (LIHTCs) awarded by the Pennsylvania Housing Finance Agency. The project has demonstrated a near 100% occupancy rate on a yearly basis with a waiting list of exceeding 100 seniors’ citizens.

2019- October 2020 – Odin View, a 47-unit 4-story senior apartment building constructed within the Westmoreland County Housing Authority – South Greengate Road Campus, located at 172 South Greengate Road, Hempfield Township – Westmoreland County. The mixed finance senior housing project was funded primarily with private equity secured with the sale of Low-Income Housing Tax Credits (LIHTCs) awarded by the Pennsylvania Housing Finance Agency. As a sister building to South Greengate Commons, this building operates at 100% occupancy levels and has a waiting list exceeding 100 senior citizens.

2022 – August 2024 – Grand View Senior Residences, a 50-unit 4-story apartment building constructed in Irwin Borough and North Huntingdon Township, Westmoreland County, PA. This 50-unit development serves the 62+ senior population with the ability to live independently. This mixed-finance development was funded primarily with private equity from the sale of Low-Income Housing Tax Credits (LIHTCs) allocated/awarded by the Pennsylvania Housing Finance Agency. On July 17, 2024, the building received a certificate of occupancy and lease-up is occurring at the development. It is anticipated the building will be 100% occupied by the end of October 2024.

2.3 WILLOWBROOK COMMONS This single-phased development is envisioned to help address the lack of affordable housing opportunities within Rostraver Township. (WNPFC) is open to development concepts. However, with the success of recent development projects, WNPFC has envisioned this project as a fifty (50) unit Affordable Independent – Senior Housing Apartment Building. Said apartment building will be a 3-4 story elevator equipped structure. This building will be constructed of wood framing, concrete masonry units, brick veneer and fiber cement siding and trim. A gabled multi-pitched asphalt shingled roof in a traditional architectural style that compliments the design of South Green Commons, Odin View and Grand View Senior Residences is envisioned.

The development will encompass the construction of a site improvements consisting of but not limited to: site access driveways, parking facilities, concrete walking trails, and landscaping, meeting land development requirements of Rostraver Township. Utilities, site grading, stormwater management, soil erosion control, etc. will be constructed for the development.

The building site is located within Willowbrook Plaza – Lot 10Rev and is considered pad ready with minimal site grading. Willowbrook Plaza is located at 4627 Route 51, Belle Vernon, PA 15012.

The building design and construction will need to comply with the **PHFA Design Standards and Allocation Plan for 2024-2025 Low Income Housing Tax Credit Program.**

The building shall be designed to address: Universal Design Standards, Uniform Federal Accessibility Standards & ANSI for six (6) “Accessible” units with one having additional hearing and visually impairment improvements. The remaining forty-four (44) “General Occupancy” units shall be designed to be “Adaptable” to support the needs of seniors aging in place. Unit design and construction shall be in conformance with VisitAbility and all Fair Housing Act provisions within 100% of the units.

Individual apartments units shall consist of one-bedroom (650-950) net square foot units and two-bedroom (850-1,300) net square foot units. Accessible units will consist of (5) one-bedroom units and (1) two-bedroom unit.

Each apartment will have its own individually controlled Energy Star® HVAC Unit that provides heating and cooling for the entire living space identified. It’s anticipated the HVAC Equipment will be a split system consisting of a gas fired forced air furnace with a remote condenser located to the rear of the building.

Energy Star® Labeled Appliances and Window treatments are to be provided within all apartments.

Building common areas and site improvements are proposed to support and encourage social activity and supportive services. Improvements shall include but may not be limited to: a community room and kitchen, supportive services center, laundry facilities on each floor, computer-internet access station within the building community room with access to building Wi-Fi, common screened in balconies on each upper floor, first floor covered patio, first floor public restrooms, first floor mail lockers, outdoor sitting space, dog walking area, first floor dog washing area, 50 individual storage lockers for supplemental storage within a common room on each floor, trash and recycling rooms on each floor, community raised gardening space, walking trail with exercise/stretching stations and sitting areas, electric car charging station (dual charger), and landscaping improvements.

Development design and construction must be **certified** to meet the mandatory measures outlined in the current Enterprise Green Communities Criteria. Reference: <https://www.greencommunitiesonline.org/>

The building exterior envelope shall be designed and constructed with an overall U-Value exceeding the requirements of the current International Energy Conservation Code as verified by a COMcheck certificate. Air sealing of the exterior envelope and attic plane shall be included.

A roof mounted solar photovoltaic array shall be incorporated into the building design to provide a minimum of 5% of the electrical needs of the building. HVAC Equipment with a capacity less than 60,000 btuh shall be Energy Star® Labeled. Programmable thermostats shall be provided. Windows shall comply with minimum ASHRAE Standards as required by PHFA, Green Building Criteria or state building code. Lighting shall be high efficiency LED fixtures and bulbs. Hot water shall be provided by a central common system. Emergency call system will be required. A closed-circuit security camera system, along with card access and accessible doors systems shall be provided. Common area heating and cooling shall be split systems or mini split systems if approved by the governing EGC standards and PHFA. Building ventilation shall be controlled by a Dedicated Outdoor Air System (DOAS). All Apartment Mechanical Condensers and DOAS Unit shall be located on roof top mechanical wells with access from both stair wells. The building shall have a dedicated natural gas generator sufficiently sized to power the elevator system, lighting, emergency power receptacles, some heating and cooling equipment.

Facility Management and Maintenance space shall be provided, and an accessible on-site management office and maintenance/storage room shall be provided. Management and Maintenance Space shall have a kitchenette and private restroom.

Local - County and State site development and zoning standards shall be adhered to for: stormwater management and best management practices (BMP's), soil erosion and sedimentation control, parking, site access, site grading, site landscaping, site lighting and traffic control.

Utilities shall be designed and constructed in accordance with service providers requirements including: Water (Municipal Authority of Westmoreland County), Sewage (Rostraver Township Sewage Authority), Natural Gas (Peoples Gas), Electric (West Penn Power) and Communications (Comcast & Atlantic Broadband). Additional design and construction requirements will be provided at the mandatory Pre-submission Meeting. Also, the WNPFC will provide by appointment a tour of Grand View Senior Residences and Odin View to review design features, level of finishes, craftsmanship standards expected at Willowbrook Commons.

- 2.4 Project Estimated Cost and Funding:** The development construction cost for site improvements the 50 Unit multi-story apartment building has been roughly estimated to be approximately \$ 11,000,000 plus a 3-4% contingency for building

construction. Site construction costs for the development have been estimated to be \$ 1,000,000 plus a 3-4% contingency.

Final soft cost percentages will be determined by PHFA but estimated as follows: Contractor Overhead Costs are limited to 6.0% with a 2.0% - Profit.

A&E Design Fee (5%-6%), fee represents Architectural, Mechanical, Electrical, Plumbing Structural Building Engineering Services and Construction Administration services.

Civil Engineering Design and Construction Support, Survey/Subdivision, Geotechnical, Environmental ESA Phase I, Permitting & Approvals, Municipal Approvals, Environmental Phase I ESA, Geotechnical is estimated (5%-8%) of development site construction costs as allowed by PHFA. The Civil Engineering Firm previously procured for this project is Morris Knowles and Associates, Mr. William Utzman, President.

To secure valuable PHFA-LIHTC application ranking points associated with Total Development Costs, the Architect – Civil Engineer - Developer/Builder and (WNPFC) will need to work to develop, design and construct a development that will demonstrate costs less than the median total development costs of the total applications submitted for the type of development proposed. In each application cycle the PHFA will determine the median total development cost per square foot (less the cost of acquisition, reserves, and commercial space).

The project funding may utilize a number of resources which may include, but not limited to: Low Income Housing Tax Credits (9% Credits), Westmoreland County Funding (HOME, CDBG, Act 137), Westmoreland County Housing Authority Funding (Loan), PHARE/RTT Funding, FHLB Funding.

Funding resources identified and estimated to be used **will not** require the use of Davis Bacon Wages – Residential Classification for Westmoreland County.

3.0 SCOPE OF SERVICES TO BE PROCURED:

3.1 General Construction “Building” Services: by a Developer/Builder shall, be consistent with applicable Commonwealth of Pennsylvania construction law, serve as General Contractor for the project and shall contract with all building material suppliers and labor / specialty subcontractors necessary to construct the proposed development. No legal contractual relationship between the (WNPFC) and any material supplier or subcontractor will exist.

Developer/Builder will provide cost estimating and any necessary support services to submit LIHTC funding application (s) to PHFA.

The Developer/Builder shall be the responsible entity to manage all aspects of construction including but not limited to:

- i. Construction Management (Office)
- ii. Temporary Building Utilities and Building Utilities during construction
- iii. Building Permit compliance
- iv. Labor law compliance
- v. Safety & Quality control
- vi. Daily site management
- vii. Project scheduling & Schedule compliance.
- viii. Building Material procurement – delivery & storage.
- ix. Provide Labor and Equipment necessary to construct the proposed building.
- x. Address Union legal challenges, if occur.
- xi. WBE-MBE-VBE,SDB Vendor/Subcontractor Recruitment and Utilization

3.2 General Design Services (By Others): The selected Developer/Builder will work with the selected architectural firm who will provide design services consistent with applicable Commonwealth of Pennsylvania licensing laws, provide professional services consisting of but not limited to: architectural, structural, mechanical – electrical – plumbing (MEP) engineering, , landscape architecture, energy efficiency analysis and engineering, green building analysis and certification. Design services shall be provided through qualified, licensed design professionals who are either directly employed by the Architecture or Civil Engineering Firms or employed by the project architect as sub-consultants. Project Architect is required to be prime consultant within the group and the Architect of Record within the Group shall be the responsible entity to manage all aspects of the design process and associated consultants. Civil Engineer will work with the Architect to coordinate the site design, site utilities, land development and zoning approvals, and site permitting.

Architectural Firms responding within the ARCHITECTURAL Proposal shall be responsible for all components of the PHFA - TECHNICAL SERVICES - DIVISION SUBMISSION GUIDE FOR ARCHITECTS (9% LIHTC Application).

Architectural Firms will contract directly with the WNPFC and will have no contractual relationship with the contractors. Architects who do not possess full service capabilities will be required to engage professional sub-consultants including but not limited to: Mechanical Engineering, Electrical Engineering, Plumbing Design, Fire Protection Design, Structural Engineering, Energy HERS Rater, and Elevator System Design.

WNPFC will contract directly for a Phase I Environmental Site Assessment as required by PHFA.

- 3.3 Site Construction Services: The Developer/Builder shall engage** a licensed Site subcontractor (SC) consistent with applicable Commonwealth of Pennsylvania construction law and should serve as the primary sub-contractor for the project site to a point at the face of building and shall contract with all site material suppliers and labor / specialty subcontractors necessary to construct the proposed development site. No legal contractual relationship between the (WNPFC) and any material supplier or subcontractor will exist.

SC shall provide cost estimating and any necessary support services to the developer-builder and team to submit LIHTC funding application (s) to PHFA.

The Site Subcontractor within the Collaboration shall be the responsible entity to the developer/builder and assist with the management of all aspects of site construction including but not limited to:

- i. Permit compliance
- ii. Labor law compliance
- iii. Safety & Quality control
- iv. Daily site management
- v. Site Schedule compliance, in conjunction with GC.
- vi. Site Material procurement – delivery & storage.
- vii. Provide Labor and Equipment necessary to construct the proposed development site.
- viii. Address Union legal challenges, if occur.

- 3.4 LIHTC – PHFA Application:** The Developer/Builder will work with Development Team to collectively prepare a preliminary development design (site and building) that addresses the requirements of the (WNPFC) and PHFA – Development Standards & QAP. Specific services and deliverables related to the LIHTC Application Submittal include but may not be limited to:

- i. Preliminary Site Plan
- ii. Municipal Land Development and Building UCC Code Review.
- iii. Building Design
- iv. Building Front Elevation Plan
- v. Floor Plans (1-4)
- vi. Unit Plan (UFAS, 1 BR, 2BR ...)

- vii. Wall Sections
- viii. Location Map w/ Area Amenities
- ix. Scope of Work Synopsis
- x. PHFA – General Contractor (Builder)
- xi. PHFA – Developer/Builder Experience
- xii. Project Cost Estimating

3.5 LIHTC – PHFA Award & Closing: The Developer/Builder will work with the Development Team to prepare a Final development design (site and building) that addresses the requirements of the (WNPFC) and PHFA – Development Standards & QAP. Specific services and deliverables related to the LIHTC – Closing with PHFA and Limited Equity Partner include but may not be limited to:

- i. Final Land Development Plans
- ii. Municipal Land Development Approvals
- iii. Final Building Design
- iv. Building Permit Approval.
- v. Building Construction Plan Set

3.6 LIHTC – PHFA Post Construction: The Developer/Builder and Development Team shall prepare contract closeout documents to secure final equity payment from Limited Partner and to allow for building to be placed into service. Specific services and deliverables related to the LIHTC – PHFA Post Construction include but may not be limited to:

- i. Assist with securing Municipal Occupancy Permit.
- ii. Prepare Record As-Built Plans
- iii. Prepare Maintenance – Operations Owner’s Manual.
- iv. Provide Warranty Manual
- v. Assist with the preparation of Project Cost Certification
IRS Form 8609.

4.0 PROJECT GOALS:

4.1 General Requirements: The project is not financially feasible without private equity secured with 9% low-income housing tax credits. Securing an experienced Developer/Builder will provide the (WNPFC) with a designer, engineer and other team members that have demonstrated expertise within the LIHTC Program. The PHFA administered program is a highly complex competition with strict schedules that must be adhered to if awarded credits. The program requires that (WNPFC) have a Developer/Builder in place to focus early on in the process the importance of designing sustainable structures that meets the needs of the proposed tenants while satisfying the design and construction standards set forth by PHFA. Utilizing a Developer/Builder the (WNPFC) is of the opinion that a team approach with the design architect, civil engineer, and site contractor will produce a project that can secure LIHTC’s and when funded can deliver the project on schedule and on budget satisfying the PHFA and Limited Partner Equity Investor requirements.

- 4.2 **Application Schedule:** The LIHTC Application is due to be submitted to PHFA prior to deadline which is **December 3, 2024**.
- 4.3 **Construction Schedule:** With the LIHTC Award, the (WNPFC) is required to place in service the development within a specified time frame, typically within 12 months from the date of equity closing. The (WNPFC) is required to deliver the tax credits to the equity investor in accordance with the master development agreement. Failure to deliver the project as defined will be costly to the (WNPFC) through downward credit adjusters.

With Tax Credit Equity guarantees in place and time it is of the essence with respect to the contract. The Project must be Substantially Complete as defined in the LIHTC Award Notice and as such, the CG must dedicate such personnel and other resources as are necessary to ensure that the Project is completed on-time and in a diligent, skilled, and professional manner.

- 4.4 **Developer/Builder – Material Participation of Minority, Women and Veteran Businesses:** The LIHTC Application ranking criteria will require the Developer/Builder to provide material participation of minority-owned, woman-owned, veteran-owned and/or service-disabled veteran-owned businesses which meets the eligibility criteria of the **Small Diverse Business Program**. The PHFA – Allocation plan outlines requirements for complying with the definition of Material Participation.
- 4.5 **Safety:** The Developer/Builder CG will be required to implement a comprehensive safety program/ plan during construction that will promote procedures and practices that promote safety for employees, subcontractors and (WNPFC) construction personnel.

5.0 SELECTION PROCEDURES & REQUIREMENTS:

- 5.1 General Requirements:** The (WNPFC) will receive and evaluate proposals according to the criteria contained within this RFQ. A determination will be made to verify that the proposers and proposals are Responsive and Responsible. Responsive and Technically Competitive Proposals will be technically reviewed including consideration of costs.

Responsiveness test, each proposal will be reviewed for the following:

- i. Conformance to the RFQ instructions, format, presence of all required documentation and attachments.
- ii. Minor informalities, irregularities and apparent clerical or mathematical mistakes that are unrelated to the substantive content of the proposal.

Responsible test, each proposal will be reviewed for the following:

- iii. Proposal was received prior to the date and time identified within the RFQ or Addendum.

- 5.2 Evaluation Committee:** The (WNPFC) will designate a Committee of three (3) to persons to review Developer/Builder proposals and participate in the interview sessions outlined in section 5.3. The Committee members will independently score the proposals from a technical and content approach and offer their rankings of proposals. The rankings will be tabulated, and the two top-rated firms will be notified and scheduled for a follow up meeting. The committee will then rank the two Developer/Builder considering the final Oral Presentation and Best and Final Offers related to development costs. The Committee led by the WCHA – Executive Director/Contracting Officer will then conduct negotiations with the highest ranked Developer/Builder to arrive at final Best Value contract for the (WNPFC). Prior to negotiations the COO/Director of A&E Services will tabulate the price proposals received to develop a competitive range. The tabulation will be shared and evaluated by the committee prior to negotiations with the two top ranked Developer/Builder. The WCHA – Review Committee may be, but not limited to the following personnel: Executive Director/Contracting Officer, COO/Director of A & E Services and Director of Development Services.

- 5.3 Oral Presentation:** The (WNPFC) intends to interview all Developer/Builder who have submitted complete and timely proposals in accordance with this RFQ; however, it reserves the right to interview Developer/Builder in a competitive range if necessary. If the (WNPFC) conducts such interviews, each Developer/Builder within the competitive range shall make an oral presentation to the Evaluation Committee and participate in a question-and-answer session. The purpose of the oral presentation and the question-and-answer session is to permit the Evaluation Committee to fully understand and assess the qualifications of each Developer/Builder, key personnel, design approach and cost. The submission will be re-scored at the conclusion of the oral presentation.

Each Developer/Builder will be given up to 45-60 minutes to make the presentation. At the end of the initial presentation, the committee may break for approximately 15-30 minutes for the Evaluation Committee to assess the presentation and prepare questions. The Developer/Builder will then respond to questions from the Evaluation Committee.

The presentation will be made by the Developer/Builder personnel who will be assigned the key management / client contract for this project. As a minimum, the Developer/Builder shall be represented by the Developer/Builder – Principal Officer In Charge of the Project and if possible, the Site Subcontractor – Principal Officer In Charge of The Project. The job functions of the persons attending the presentation will be an indication of the Developers assessment of the key areas of responsibility that are deemed essential to the successful completion of the project.

- 5.4 Tabbed Proposal Format:** So, the (WNPFC) can properly evaluate the offers received, all proposals submitted in response to this RFQ must be formatted in accordance with the sequence noted. Each category must be separated by numbered index dividers or tabs (which number extends so the (WNPFC) can identify each tab without opening the proposal) and labeled with the corresponding tab reference also noted below. None of the proposed services may conflict with any requirement published herein or issued by addendum.

Proposals shall be submitted with indexed tab sections based on the requested components of the RFQ. If the proposers elect to submit additional tabbed sections those shall be identified and added to the end of the submission. As a minimum the following tabbed sections shall be provided:

TAB 1	Proposal Transmittal Letter
TAB 2	Executive Summary
TAB 3	Forms: <ul style="list-style-type: none">▪ Statement of non-collusion▪ Equal Employment Opportunity Certification
TAB 4	Organizational Chart for the Proposal including Developer/Builder with key sub-contractors identified if known.
TAB 5	Organizational Chart for individual Developer/Builder Members <ul style="list-style-type: none">• Key Personnel – Resumes Included
TAB 6	Minority, Women and Veteran Business Participation Plan
TAB 7	Summary of Legal Issues - Liabilities – Proceedings (2019-2024)

TAB 8	Qualifications and Experience (Collectively and/or individually) <i>Ref. Section 6.0 of the RFQ.</i> Note: Detailed representative project information shall include but need not be limited to: Client, Unit Count, Occupancy Type, Cost, Change Order Total or Percentage, Change Order Type (Owner Requested, Unforeseen Conditions, Design Related) Development Location, Schedule Compliance, Unique Building Design Components, Awards,
TAB 9	References related to representative projects identified within TAB 8
TAB 10	Willowbrook Commons - Project Approach to building said development.
TAB 11	Surety Company – General Contractor Bonding Capacity / Commitment to Bond Willowbrook Commons.
TAB 12	Construction Cost Estimate <i>(Based on preliminary site plan to be provided and based on buildings constructed of similar size, style and amenities.) (Again, access to Grand View Senior Residences and Odin View will serve as a preliminary basis of design.)</i>

5.5 Proposal Submission: All proposals must be submitted and time-stamped received in the designated (WNPHC) office by no later than the submittal deadline stated herein (or within any ensuing addendum). A total of 3 original signature copies of the proposal shall be placed in a sealed package and addressed to:

MR. ERIK SPIEGEL, COO/DIRECTOR OF A&E SERVICES
 WESTMORELAND COUNTY HOUSING AUTHORITY
 167 SOUTH GREENGATE ROAD
 GREENSBURG, PA. 15601

The package exterior must clearly denote the above noted RFQ number and must have the Developer – Builder Corporate name and return address. Proposals received after the published deadline will not be considered.

The proposal shall comply with the following requirements:

- Submittals shall be in a 3-Ring Binder or a manufactured edge binder system.
- Proposals shall be signed by a Corporate Principal of the Developer/Builder.

In addition to the submission requirements identified within this section, the proposal shall address the submission content requirements of Section 6.0.

5.6 Submission Conditions: DO NOT FOLD OR MAKE ANY ADDITIONAL MARKS, NOTATIONS OR REQUIREMENTS ON THE DOCUMENTS TO BE SUBMITTED! DEVELOPER/BUILDER 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 (WNPHC) by the DEVELOPER/BUILDER, such may invalidate the proposal.

- 5.7 DEVELOPER/BUILDER Responsibilities—Contact With the (WNPHC):** It is the responsibility of the Developer/Builder to address all communication and correspondence pertaining to this RFQ process to the COO/Director of A&E only. Developer/Builder must not make inquiry or communicate with any other (WNPHC) staff member or official (including members of the Board of Commissioners) pertaining to this RFQ. Failure to follow this requirement may be cause for the (WNPHC) to not consider a proposal received from any Developer/Builder who may not have followed this directive.
- 5.8 Addendums:** All questions and requests for information must be addressed in writing to the COO/Director of A&E via email. The Director of A&E may respond to all such inquiries in writing by addendum to all prospective Developers/ Builders . During the RFQ solicitation process, the (WNPHC) will not conduct any *ex parte* (a substantive conversation— “substantive” meaning, when decisions pertaining to the RFQ are made—between the (WNPHC) and a prospective Developers/Builders when other prospective Developers/Builders are not present conversations may give one prospective Developers/ Builders an advantage over other prospective Developers/Builders .
- 5.9 Pre-proposal Meeting:** The scheduled mandatory pre-proposal meeting is identified on Page 3 and 4 of this document. The purpose of this meeting is to assist prospective Developer/Builder with (WNPHC) full understanding of the RFQ documents and development purpose. At this meeting, the (WNPHC) will conduct a brief overview of the RFQ documents, including the attachments. Additional information pertaining to development requirements and expectations will be presented. Prospective Developers/Builders may also ask questions, however the (WNPHC) may ask questions be formally delivered in writing prior to a response being delivered. Whereas the purpose of this conference is to review: the RFQ documents, design-construction requirements and to review the general site location and vision of the WNPHC which will serve as the basis of design for many components of WILLOWBROOK COMMONS. Attendees should bring a copy of the RFQ documents to this conference. The (WNPHC) **will not** distribute at this conference any copies of the RFQ documents.

5.9.1 General Directions to the Pre-proposal Meeting:

US Route 70 West – East to US Route 51 North to 600 Willowbrook Plaza, Belle Vernon, PA 15012
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6.0 EVALUATION FACTORS:

6.1 Qualifications: Developer/Builder will need to demonstrate, to the complete satisfaction of the Review Committee, that all entities of the Developer/Builder Team have the necessary ability, capacity, experience, and financial resources to build WILLIOWBROOK COMMONS. Experience and knowledge of the PHFA – LIHTC (9%) program is required by the Developer/Builder. Developer/Builder shall include within proposal submission the following:

- i. Summary of Affordable Housing projects with emphasis placed on LIHTC Senior Housing projects developed within the past 5-10 years. Developed shall mean working with an architectural / engineering team and ownership group from start to finish.
- ii. Summary of Affordable Housing projects with emphasis placed on LIHTC Senior Housing projects constructed within the past 5-10 years. Detailed development information for a representative sample (1-5) Affordable Housing / LIHTC projects constructed by Builder (GC) within the past 5-10 years.

6.2 References: Developer /Builder will need to provide client references for each entity for the projects identified within section 6.1. Client references shall have working knowledge of the completed project design, construction processes, and financials.

6.3 Executive Summary: shall contain information to familiarize the review committee with the Developer/Builder project approach to satisfy the requirements of this RFQ and PHFA – LIHTC Program. Narrative, sketches, and photographs shall be used to convey the Developer/Builder intent and understanding of the project design and construction requirements. In addition, if the Developer/Builder proposes Alternative Construction Concepts (ACCs) those concepts shall be clearly identified and explained in detail so the review committee can make an educated decision to accept or reject said ACCs.

7.0 EVALUATION SCORING CRITERIA:

7.1 Qualifications – Experience & References:

7.1.1 **Qualifications:** scoring will emphasize the qualifications, experience, and resumes of corporate governance-management of Developer/Builder. Qualifications, experience and resumes of principal owners, project management personnel, including but not limited to: Construction Project Manager, Superintendent and Quality Control Personnel. Qualifications and experience of key subcontractors estimated to be employed on this project.

7.1.2 **Experience: scoring** will emphasize demonstrated and successful completion of various affordable senior housing developments with emphasis placed upon those developments completed using 9% low-income housing tax credits. Scoring will take into consideration the following:

- a. Developed Projects within a team structure, with emphasis on LIHTC Projects
- b. Constructed Projects with emphasis on LIHTC Projects.

7.1.3 **References:** scoring will emphasize the input from client references who have intimate working knowledge of projects completed by the Developer / Builder. LIHTC project references will impact higher scores. Review committee may elect to visit completed projects to meet with references and to view first-hand the completed projects.

7.2 **Project Approach:** scoring criteria related to the project design and implementation are as follows:

7.2.1 Proposal demonstrates a feasible and well-considered approach to the construction of the project that will exceed the (WNPFC) expectations and within the PHFA-LIHTC program requirements.

7.3 **Material Participation of Minority, Women and Veteran Businesses:** scoring will emphasize a demonstrated plan to incorporate into the Design – Build Team, businesses that are classified as Minority, Women and Veteran owned that meet the eligibility requirements of PHFA, including Small Diverse Business Classification. PHFA requirements to secure application ranking points is as follows:

7.3.1 Firm / Entity:

- a. Developer/Builder Contract Values:
1 application point at 1%-4.99% of Total Development Cost.
- b. Sub-Contractor/Vendors Contract Values:
1 application point at 1%-4.99% of Total Development Cost.

7.3.2 Firm / Entity:

- Developer/Builder Contract Values:
2 application points at >5.00% of Total Development Cost.
- c. Sub-Contractor/Vendors Contract Value:
2 application points at >5.00% of Total Development Cost.

7.4 **Total Development Cost:** Scoring criteria will emphasize a demonstrated approach to the design and construction of Willowbrook Commons PHFA's Total Development Cost limitations as necessary to secure the maximum allocation of ranking points from PHFA in the LIHTC application for Willowbrook Commons. The estimated Construction and Architectural & Engineering fees arrive at a Total Development Cost. Each cost component shall be broken down into the following line items with costs provided for each:

Willowbrook Commons:

DEVELOPER / BUILDER – APPLICABLE FEES & COSTS

Building Construction:

1. General Contractor - Construction Cost
2. General Contractor – Overhead Cost
3. General Contractor – Profit
4. General Contractor – Bond Cost
5. Mechanical Construction Cost w/ OH-Profit-Bond
6. Electrical Construction Cost w/ OH-Profit-Bond
7. Plumbing Construction Cost w/OH-Profit-Bond

Total Building Construction Cost = _____

DEVELOPER / BUILDER – APPLICABLE FEES & COSTS

Site Construction:

8. Site Contractor – Construction Cost
9. Site Contractor – Overhead Cost
10. Site Contractor – Profit
11. Site Contractor – Bond Cost

Total Site Construction Cost = _____

Developer / Builder (I.e. General Contractor) shall work with their selected MEP subcontractors to identify the costs contained within 5-7 above.

Architectural & Engineering Building Fees:

12. Architect Design Fee
13. Architect Administration Fee (including construction phase).
14. Engineering Fees (MEP, Structural, Fire)
15. Energy Star – HER Rater -Energy Audit and Testing
16. Enterprise Green Communities – Consultant

Total Architectural & Engineering Cost = _____

CIVIL ENGINEER (MORRIS KNOWLES & ASSOCIATES) FEES & COSTS

Engineering Site Design Fees:

17. Civil Engineer – Design Fee
18. Civil Engineer – Construction Phase
19. Geo Technical – Consultant Fee
20. Surveying & Subdivision
21. Permitting Fee
22. Construction Testing Estimated Fee
23. Municipal Approvals

Total Engineering Cost = _____

TOTAL DEVELOPMENT COST (TDC) = _____
TDC = Total Construction Costs (Building & Site) + Total Architectural &
Engineering Building Costs + Engineering Site Costs

8.0 CERTIFICATIONS:

The following Certifications are applicable to this Request for Qualifications (RFQ) and shall be completed and included within the proposal submission as identified within the RFQ:

- **Exhibit A: Statement of non-collusion**
- **Exhibit B: Equal Employment Opportunity Certification**