



PENNROSE
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**REQUEST FOR QUALIFICATIONS # 2022-29
FOR
ARCHITECTURAL AND ENGINEERING SERVICES
FOR 36N A 545 UNIT NEW DEVELOPMENT**

RELEASE DATE
NOVEMBER 14, 2022

DUE DATE
DECEMBER 5TH, 2022
@ 4 PM Central Time

www.tulsahousing.org/contracting/rfps

www.pennrose.com

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1. INSTRUCTIONS FOR RESPONDERS

- a. The THA Development Corporation, Inc. (THADC) and Pennrose invite Responses for Architectural and Engineering (A&E) Services for 36N, a Six-Phase, 545-unit new development, formerly known as Comanche Park.
- b. RFQs are available at www.tulsahousing.org/contracing/rfps.
- c. Responses to the RFQ shall be submitted on the website www.tulsahousing.org/contracting/RFPs via one (1) digital PDF file labeled in the following manner:

<RESPONDER NAME > _Architectural and Engineering Services RFQ #C22-XX Response
- d. The criteria for evaluating the Responses will be based on the items set forth in the RFQ.
- e. The Office of Contracts reserves the right to reject any or all Responses.
- f. Any questions regarding the RFQ can be directed via email to Kent Keith, Vice President Construction Services kent.keith@tulsahousing.org and Cody Roskelley, Senior Developer at Pennrose, croskelley@pennrose.com .

2. CO-DEVELOPERS BACKGROUND

THA Development Corporation, Inc, (THADC) is an affiliate organization of the Housing Authority of the City of Tulsa, is Pennrose’s development partner on all phases of the 36N development. THADC and its affiliate organizations, have extensive mixed finance experienced with a substantial rehabilitation and new construction housing development pipeline exceeding \$500M over the next three (3) years. THADC and its affiliates are currently completing a similar multiphase development under the Choice Neighborhoods Initiative Program in West Tulsa, the River West development. For more information visit www.tulsahousing.org.

Pennrose, LLC is a premier multifamily development company with a national reputation for excellence. In its more than 40 years of experience, Pennrose has developed 27,000 units, representing over \$5 billion in total development costs financed through a variety of public and private sources, including Low Income Housing Tax Credits (LIHTC), Historic, New Market, and Solar & Geothermal Tax Credits, FHLB, HOME, HOPE VI, RAD, and more. Pennrose was ranked the 5th largest Affordable Housing Developer in 2020 and been selected as a development partner by more than 100 agencies, housing authorities, and co-developers. Pennrose is widely recognized as one of the nation’s leading affordable housing developers and has served as developer on 26 Hope VI projects, totaling more than 4,480 units of new housing. Pennrose is currently working on two CNI projects (FY2018 and FY2019) that will total 672 Units when complete. For more information about Pennrose, please visit our website at www.Pennrose.com .

3. INTENT OF SOLICITATION

The intent of this RFQ is to solicit the services of a firm that can provide comprehensive Architectural and Engineering design services for the development of a six phase, roughly \$200 Million, 545-unit multifamily redevelopment of the Comanche Park Apartments under the United States Department of Housing and Urban Development (“HUD”) Choice Neighborhoods Initiative (“CNI”) Program. This new construction development called 36N will be funded by and under the regulation of HUD, the Oklahoma Housing Finance Agency (“OHFA”) administering The United States Internal Revenue Service (“IRS”) Low Income Housing Tax Credit Program (“LIHTC”), The State of Oklahoma (“OK”), and The City of Tulsa (“COT”). The scope of the Architect services will include but not limited to, design, development, engineering (excluding civil engineering), consulting services, and all related work as required, as same may relate to the project represented by THADC and Pennrose.

4. PROJECT DESCRIPTION

The 36N CNI Housing Plan (Housing Plan) includes replacing 271 distressed public and assisted housing units at the Comanche Park housing development with 545 units of high-quality mixed income rental housing at the appropriate density for the community. The development will be built in 6 phases over a 5-year period. **(Exhibit B – CNI Project Summary and Phasing Plan)**.

The Housing Plan will be developed on approximately 36+ acres of land roughly bounded by North Peoria Ave & 36th Street. The area includes Comanche Park Apartments (271 units). The existing housing buildings will be environmentally remediated and demolished before the site is prepared for the future phases of new construction.

While the overall Housing Plan is to be developed in seven phases, as shown in the Phasing Plan, THADC and Pennrose are seeking a qualified Architect for the six multifamily phases for the CNI development, subject to performance on a phase-by-phase basis. The selected Architect and Engineering firm is not guaranteed or entitled to selection and/or assignment of any other phases in this project after Phase I. THADC and Pennrose reserve the right to issue another RFQ for Architectural services for all later phases. The selected Architect may be contracted for future phases of work subject to satisfactory performance on Phase I.

The six multifamily phases of the Housing Plan will include 1-5 bedrooms, Enterprise Green Community (EGC) criteria, and amenities such as dishwashers, ceiling fans and wireless internet connection. The building types are diversified with two-, three-, and four-story buildings. The community will have townhouses, stacked townhouses, walkup apartments, and double-loaded corridor elevator style buildings. The project will also have at least two FEMA Rated Storm Shelters or Safe Rooms that can accommodate residents. All site improvements will be designed in conformance with local, State, and federal requirements and related funding requirements. Below you will find the number of units in each phase of the project:

- Phase I consists of 100 units of mixed-income housing [comprehensive review of current design]
- Phase II consists of 94 units of mixed-income housing
- Phase III consists of 81 units of mixed-income housing
- Phase IV consists of 72 units of mixed-income housing
- Phase V consists of 96 units of mixed-income housing
- Phase VI consists of 102 units of mixed-income housing

Construction of new public infrastructure (work in the rights-of-ways) to support the new apartment community will be constructed concurrently with the housing and will be overseen by the City of Tulsa through CIP contracts. THADC & Pennrose will collaborate and support the City, and their procured GC, to ensure aligned delivery with each housing phase. The public infrastructure work will be comprised of new streets, sidewalks, curbs and gutters (along interior streets and portions of perimeter streets); street lighting and landscaping in the right-of-way, including street trees; new storm water drainage, sanitary sewers, water main, and the dry utility distribution systems.

Each phase of the six phased development will be privately owned and managed by Tulsa Housing Management, Inc., a subsidiary of The Housing Authority of the City of Tulsa.

5. TERM OF CONTRACT

The Architectural firm selected under this RFQ will be pre-qualified and pre-procured for the initial Phase I contract and may be contracted for additional phases to provide work within the Scope of Services subject to performance evaluation.

6. SCOPE OF SERVICES

a. Work Covered:

The Firm shall work as part of a team of individuals including THADC and Pennrose personnel and its affiliated entities and/or contractors. The scope of services to be provided shall include, but are not limited to, assessing, providing design, engineering, consulting services, and all work related to the development and design of 36N. The scope of services to be provided may also include, but is not limited to, the following items:

- i. Preliminary Owner meetings to establish project parameters;
- ii. Preparation of design plans and specifications;
- iii. Prepare structural plans and specifications;
- iv. Prepare mechanical/electrical plans and specifications;
- v. Prepare landscape plans and specifications;
- vi. Submit 100% completed plans at each design milestone, such as but not limited to schematic design, design development, 50% construction documents, 80% construction documents and final plans and specification, to THADC and Pennrose for final approval. Incorporate any additional comments and submit plans to THADC, Pennrose, and the City of Tulsa;

- vii. Coordinate with City, utility companies, franchise utility entities, developers, stakeholders, and other project consultants and assist THADC / Pennrose in obtaining permits;
- viii. Respond to plan review comments and revise documents as required;
- ix. Assist THADC and Pennrose in the bidding process, including answering contractor RFI questions and issuing addenda during bidding when required;
- x. Answer contractor RFI's during construction and issue drawing changes;
- xi. Review of shop drawings and submittals;
- xii. Include site visits during construction to review site conditions and /or review construction compliance with the contract documents;
- xiii. The team shall have representation from the Tulsa market.

b. General Requirements:

- i. The Firm(s) shall have previous experience in performing services requested in the "Scope of Service" and have been operating for a minimum of three (3) years.
- ii. THADC and Pennrose encourage proposing firms to consider the scope of services requested and proposes services that meet the needs of the agency.
- iii. The Firm(s) shall provide brief resumes of the proposed staff along with detailed information about the firm's access to the staff.
- iv. The proposal shall include a definition of on-site and off-site hours proposed by staff members.
- v. Although subcontractors are not prohibited, THADC and Pennrose desire to establish a relationship with a firm that is knowledgeable of the "Scope of Service" and work with personnel that is employed by the firm to allow for future access to the proposed consultants.
- vi. The Firm(s) shall furnish a certificate of Workers' Compensation and Liability Insurance.
- vii. The Firm(s) shall indemnify and hold THADC and Pennrose harmless from all claims, causes of actions, and judgment for personal injury, loss of life, or property damage suffered in connection with performing these services.
- viii. The Firm(s) shall provide THADC and Pennrose with proof of non-profit status (if applicable).

c. Billing and Payment:

- i. The Firm(s) will be required to conduct thorough inspections or attend meetings with THADC and Pennrose staff prior to Architectural and Engineering Service invoices being paid and must be present at all OAC meetings and payment draw meetings.
- ii. The Firm(s) agrees to submit a monthly statement enumerating services, which have been completed along with an invoice for payment for such completed services. Invoices shall include a summary of work performed for each individual site including site name, list of work performed, date of work performed, and hours worked.

d. Reporting and Record Management:

- i. The Firm(s) shall provide any documents and reports that THADC and Pennrose may reasonably require, verify, and meet THADC and Pennrose policy and procedures.
- ii. The Firm(s) shall provide any recordkeeping and reporting requirements as agreed upon by the THADC and Pennrose and firm.

e. Additional Work:

- i. Should additional work be required, which is beyond the scope of this RFQ but is related to the overall contract, the Firm shall be requested to submit a written proposal and upon approval, a task order shall be issued to authorize the work.

7. RESPONSE FORMAT

Proposals must be submitted in the format of tab order listed below. Responders that deviate from this format may be deemed unresponsive. Proposals should be provided in a straightforward and concise manner. Emphasis in the proposal should be on the contractor's capacity and capability to satisfy the requirements of the RFQ. Respondents choosing to provide additional materials (e.g., brochures, marketing materials, company profiles, etc.) should include them in a separate section of the Proposal. THADC and Pennrose reserves the right to request additional information, if necessary, to complete the evaluation and selection process. All proposals and accompanying documentation shall become the property of THADC and Pennrose and will not be returned.

Tabs	Title	Contents
1	Letter of Intent	A brief letter (one-page maximum) that summarizes the firm's qualifications, the lead contact for the proposal, and an agreement to furnish the services in accordance with the RFQ. An officer of the firm authorized to execute contracts must sign the Letter of Intent.
2	Statement of Qualifications	Provide a brief description of the firm, history, number of employees, and other general information that demonstrates the firm's qualifications and capacity to complete the work described in this RFQ. Copies of any licenses and/or certifications shall be provided for all personnel. Include qualifications for all known sub-contractors delivering services. Also, demonstrated evidence that the firm has the visionary expertise to develop creative solutions for complex projects.
3	Architectural and Engineering Services Experience	Describe the firm's experience with large-scale, multiple locations, and comprehensive architectural and engineering services. Provide three (3) specific examples that are relevant to the Scope of Services requested in this RFQ.
4	Design Development Team	Provide a list of all personnel involved in the Design Development Team and Project Management across the entire scope of services

		and daily points of contact for technical assistance both general and emergency assistance, and data, if any, on response times for responding to resolving emergency incidents.
5	Clear and Competitive Pricing & Fee Structure	All costs shall be presented as an estimate of total project costs by service as defined in the scope of services, except for other services that may be required of the Architectural firm and are not specifically listed within the scope of services above. However, the fee structure shall include hourly rates for principals, clerical, etc. (Personnel, supplies, administrative expenses included).
6	References	Provide a minimum of three (3) references that can verify: Past performance in terms of quality of work, cost control, compliance with performance schedules, and ability to adapt to changes in project scope, field conditions, and unforeseen challenges.

8. TIMELINE

Action	Deadline
Issue Request for Qualifications	Nov 14, 2022
Last Day Accepting Questions	Nov 28, 2022 @ 4PM CT
Deadline for Response Submissions	Dec 5, 2022 @ 4PM CT
Interview Selected Architects	Dec 7 and 8, 2022

NOTE: All interviews are in-person, and all Respondents are hereby notice to ensure their availability to come to Tulsa, Oklahoma for a 45 minute in-person interview.

Make Final Selection	Dec 16, 2022
Negotiate and Execute Agreement	Jan 2, 2023

9. RESPONSE EVALUATION

- a. THADC and Pennrose will evaluate all the responses received on the criteria set forth above and shall rank them in numerical order, based on the aggregate of the evaluation factors as set forth below.

Criteria	Points Available	Reference
Demonstrable experience and success in managing large-scale, multi-location, and complex architectural and engineering services.	30	Section 5 Tabs 1, 2 & 3
Design Development Team	25	Section 5 Tab 4
Clear & Competitive Pricing	20	Section 5 Tab 5
Section 3 Compliance	10	Section 10
Overall Responsiveness	15	
Total Points	100	

- b. Based on the factors set forth above the entity will select the most qualified Responder/Offeror(s) and rank them in numerical order. Once the proposals are ranked, the THADC and Pennrose **will** invite the highest ranked Responder(s) for an in-person interview. THADC and Pennrose **may** then arrange for additional meetings to allow for evaluation and modification of the proposal, if necessary. Responders may be given the opportunity to clarify any portion of their Proposal and to submit their best and final offer to the entity. At THADC and Pennrose’s sole discretion, after conducting a thorough review and cost analysis, the highest-ranking Responder may be selected.

10. SECTION 3 COMPLIANCE

The work to be performed under this contract is subject to the requirements of Section 3 of the Housing and Urban Development Act of 1968, as amended, 12 U.S.C. 1701u (Section 3). The purpose of Section 3 is to ensure that employment and other economic opportunities generated by HUD assistance of HUD-assisted projects covered by Section 3, shall, to the greatest extent feasible, be directed to low- and very low-income persons, particularly persons who are recipients of HUD assistance for housing.

11. NOTICE OF ATTACHMENTS, IF SELECTED:

*IF SELECTED, awarding of a Contract **shall be conditioned** on receipt of the following forms as assigned at the time of Contracting:*

THADC Form A: Company Information

AND, standard HUD Forms, which can be downloaded from the HUD Website [here](#):

1. HUD Form 5369 Instructions
2. HUD Form 5369-A Representations and Certifications
3. HUD Form 5369-B Instructions to Offerors Non-Construction
4. HUD Form 5370 General Conditions
5. HUD Form 5370-C1 Section I
6. HUD Form 5370-C2 Section II
7. HUD Form 50071 Certification of Payments to Influence Federal Transactions
Find [here](#)