



DCHA 2020 Physical Needs Assessment Pre-Proposal Conference

April 9, 2020



Background Information

Framing the Problem | Outlining Strategies

Who We Are

Mission



Our Mission:

To create **quality affordable housing** to **extremely low-** through **moderate-income** households, foster sustainable communities, and cultivate opportunities for residents to improve their lives

Who We Are

By the Numbers

Our People

More than **53,000 District residents benefit** from DCHA's programs and services:

- 15,500+ youth
- 6,000+ seniors
- 12,500+ people with disabilities
- 1,200+ veterans

Waitlist

43,000+ households total on one or more waiting lists, including:

Public Housing – **27,000+**

Housing Choice Voucher – **39,000+**

Mod Rehab – **23,000+**

Public Housing

Nearly **12,400** people live in DCHA's **traditional public housing**.

DCHA's **traditional public housing** portfolio contains more than **8,500 units**

The scope of this RFP covers just over **6,100 units of that portfolio**

Voucher Program

DCHA has nearly **26,500 customers** using **federal voucher** subsidy and more than **15,000** using **local voucher** subsidy. Together, make up for **78%** of people DCHA serves.

DCHA administers some **14,000 federal and local vouchers** in the private market.

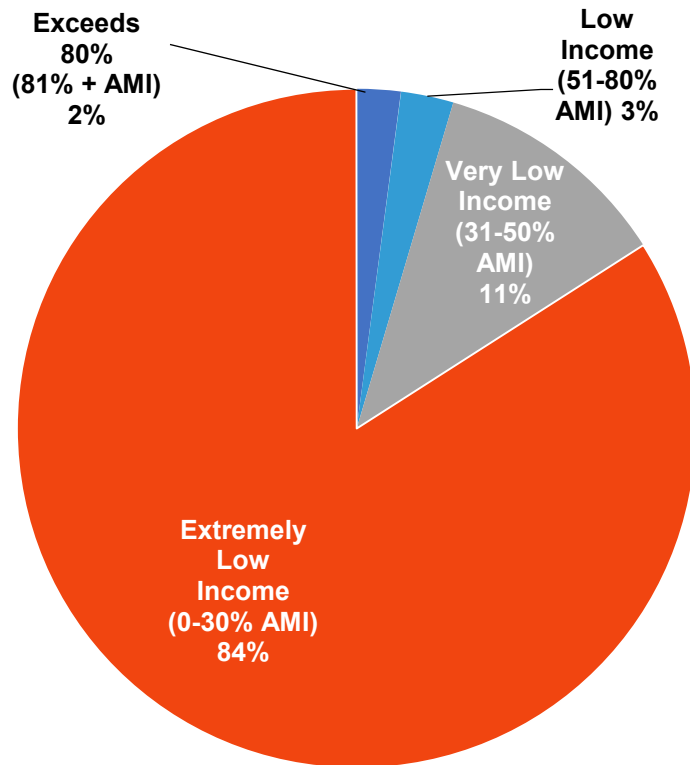
The **average contract rent** for a voucher customer is **\$1,500**

The tenant portion of rent is always 30% of the household's adjusted gross income.

Our People

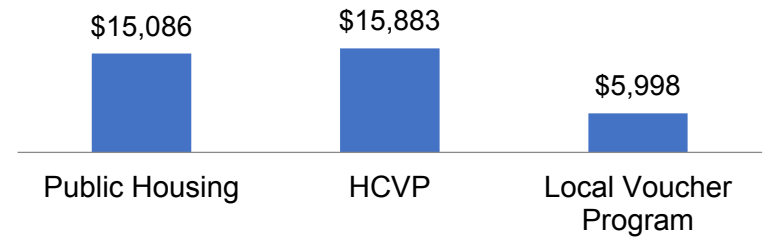
Resident Demographics

DCHA households served by income level

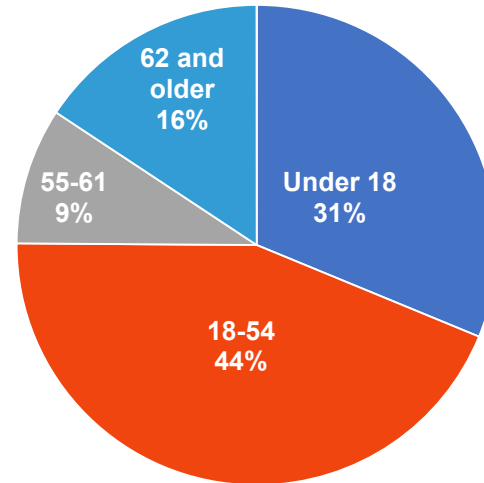


Average household income, \$

Poverty threshold for a family of 4 = \$26,200¹



Residents by age group, % total



Nearly half of all DCHA residents are elderly or children and 95% are extremely low income or very low income (<30% AMI)

Note: Demographic data as of June 2019. AMI data as of October 2019.

¹ <https://aspe.hhs.gov/poverty-guidelines>

Our Portfolio

Conventional Public Housing

Ward 1 (8)

- Garfield Terrace (Family)
- Garfield Terrace (Senior)
- Harvard Towers
- Kelly Miller
- LeDroit Apartments
- Ontario Road
- Park Morton Apartments

Ward 2 (4)

- Claridge Towers
- Horizon House
- James Apartments
- Judiciary House

Ward 3

- Regency House

Ward 5 (6)

- Fort Lincoln
- Langston Addition
- Langston Terrace
- Lincoln Road
- Montana Terrace

Ward 6 (10)

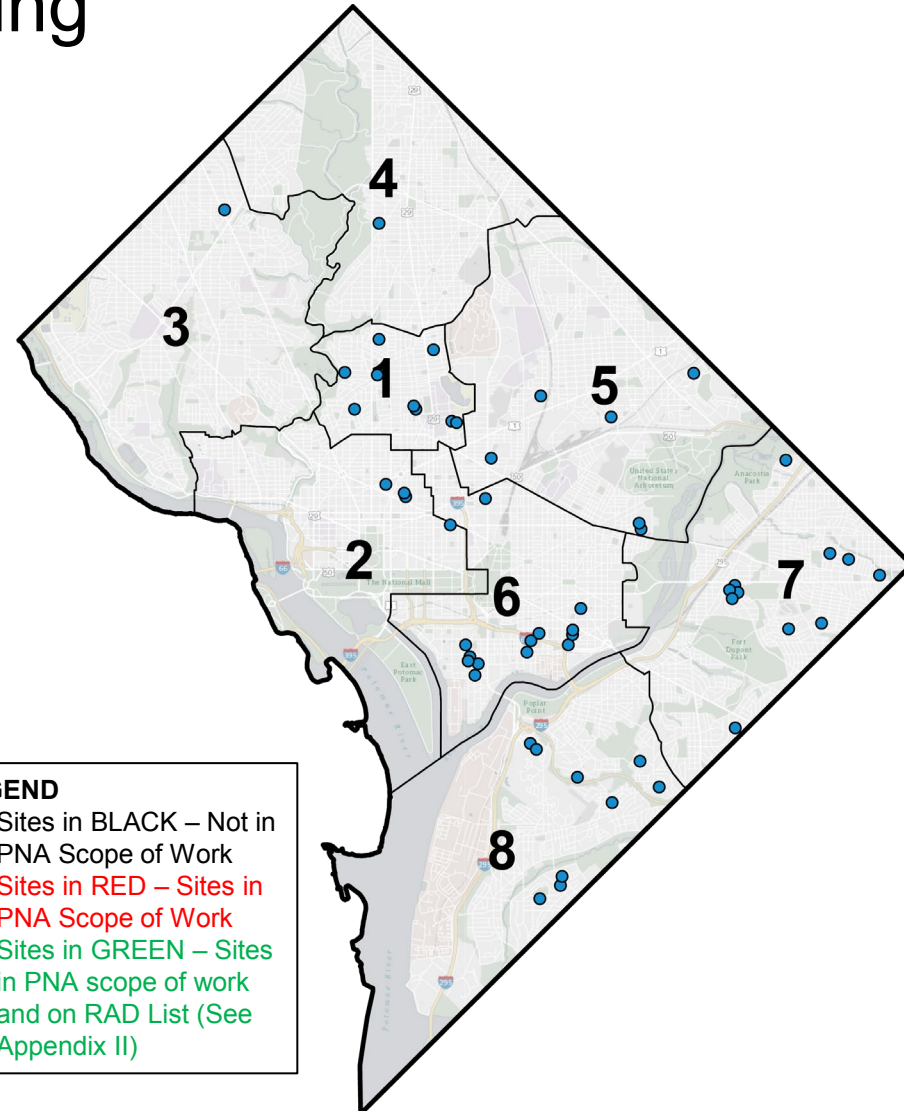
- Carrol Apartments
- Greenleaf Gardens, Extension and Additions
- Greenleaf Senior
- Hopkins Apartments
- James Creek
- Kentucky Courts
- Potomac Gardens Family
- Potomac Gardens Senior
- Sibley Plaza
- Syphax Gardens

Ward 7 (8)

- Benning Terrace
- Fort Dupont Addition
- Fort Dupont Dwellings
- Kenilworth Courts
- Lincoln Heights
- Richardson Dwellings
- Stoddert Terrace
- The Villager

Ward 8 (7)

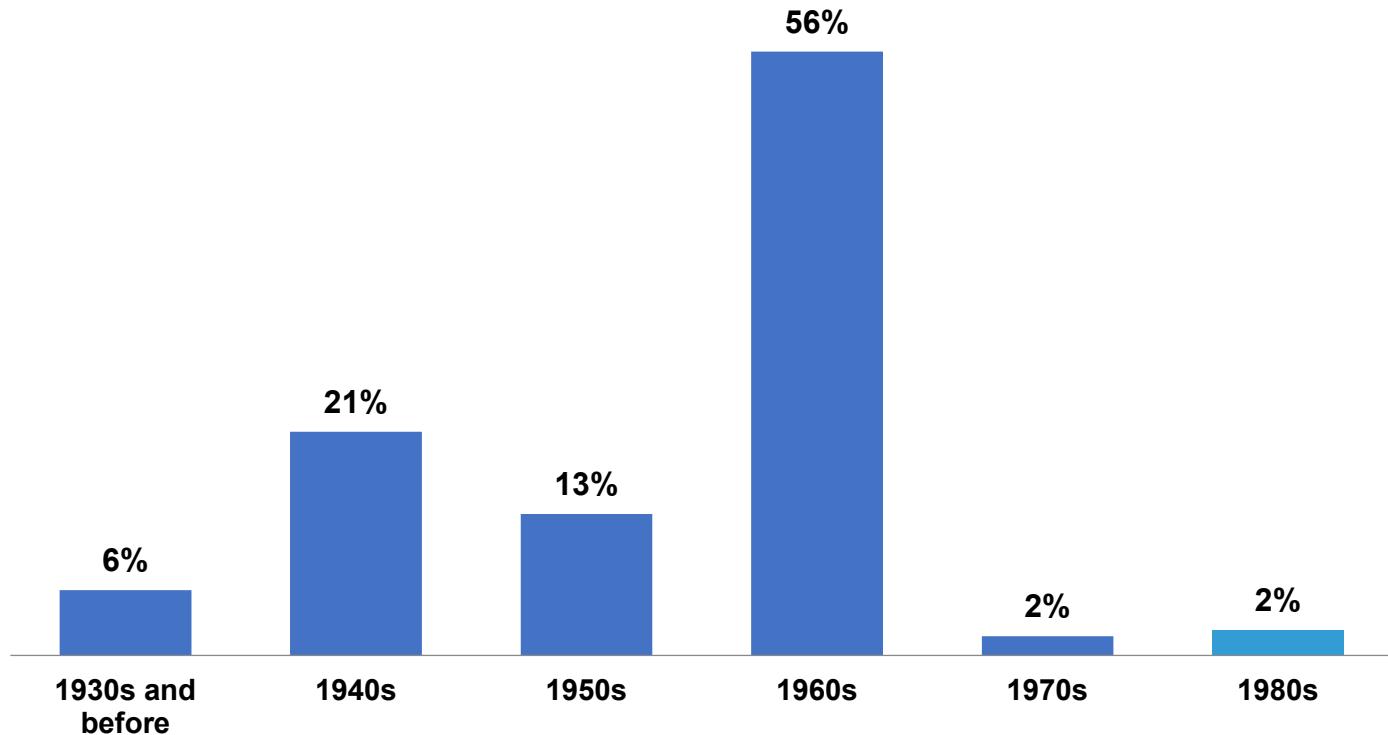
- Barry Farm
- Elvans Road
- Highland Addition
- Knox Hill
- Wade Apartments
- Woodland Terrace



Framing the Issue:

Age of Conventional Public Housing Portfolio

DCHA traditional public housing stock by construction date
%, Total units

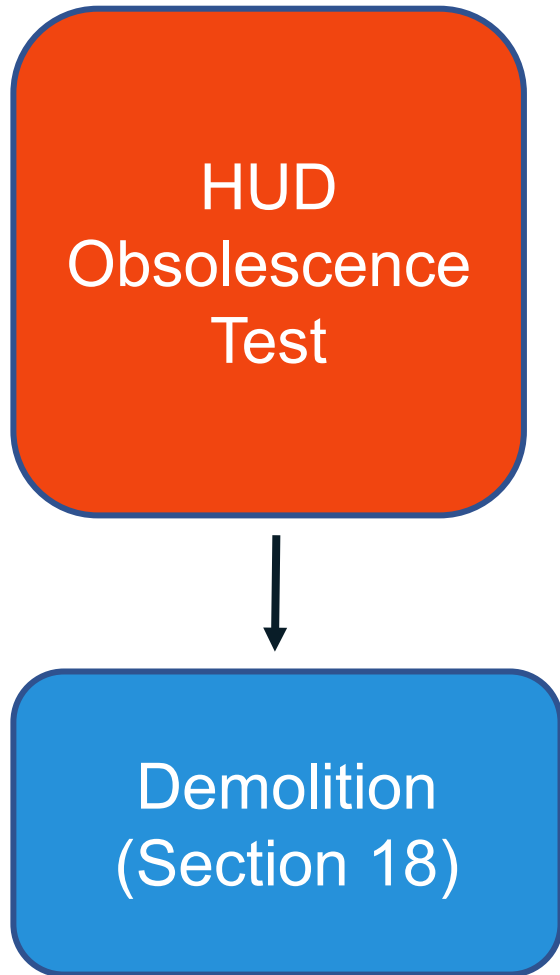


DCHA Transformation Plan:

Three Categories of Potential Work

Obsolescence Test

HUD Requirement: Cost Effectiveness to Utilize Section 18

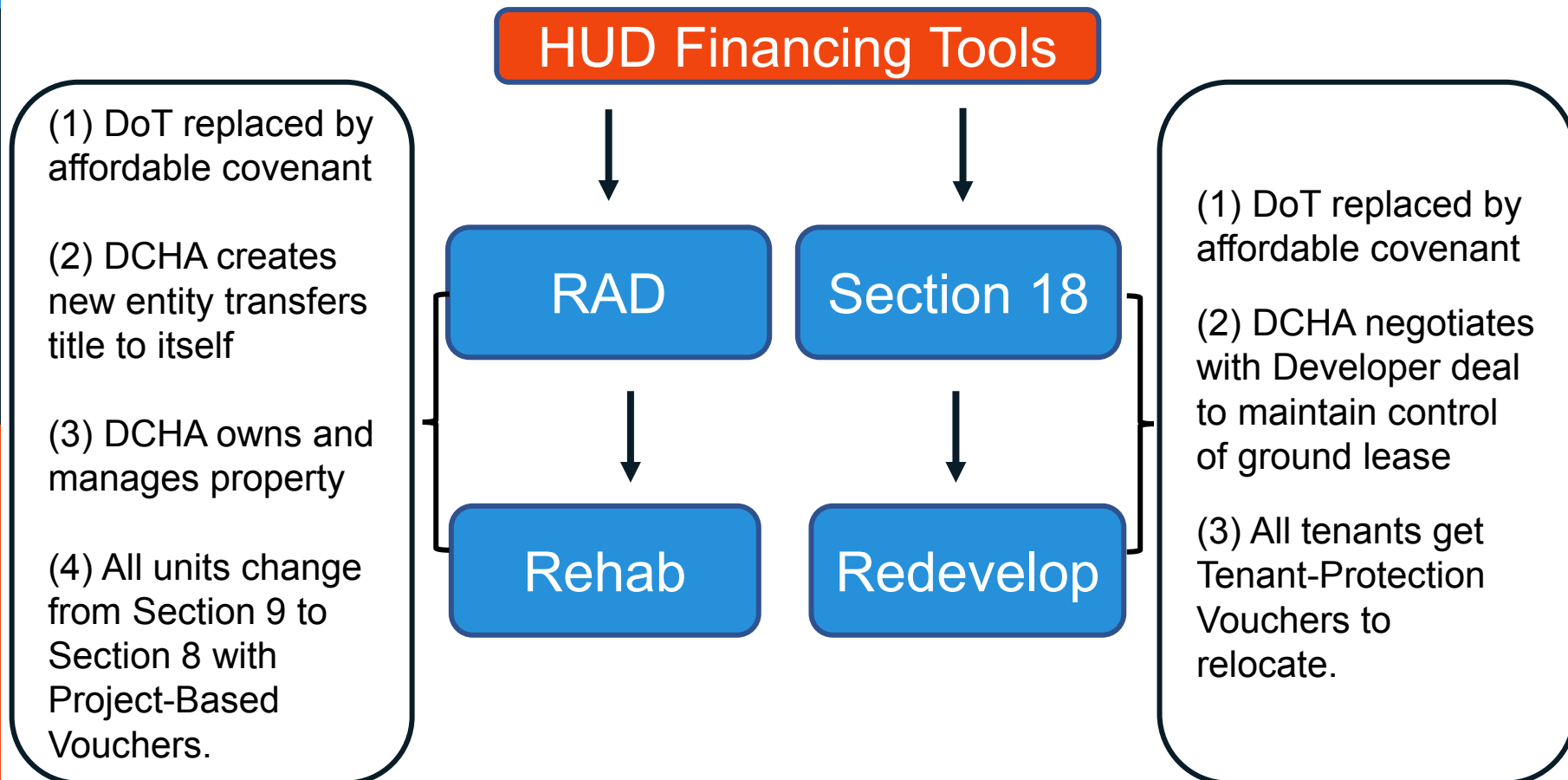


In order for HUD to approve a Section 18 application, they require public housing authorities to demonstrate it is no longer cost effective to perform modifications or minor to moderate rehabilitation on a property.

HUD generally considers modifications not to be cost-effective if costs **exceed 62.5% of total development costs (TDC)** for elevator structures and **57.14%** for other types of structures.

RAD v. Section 18

Financing Tools Available



Our Approach

Preservation, Rehabilitation, and Redevelopment

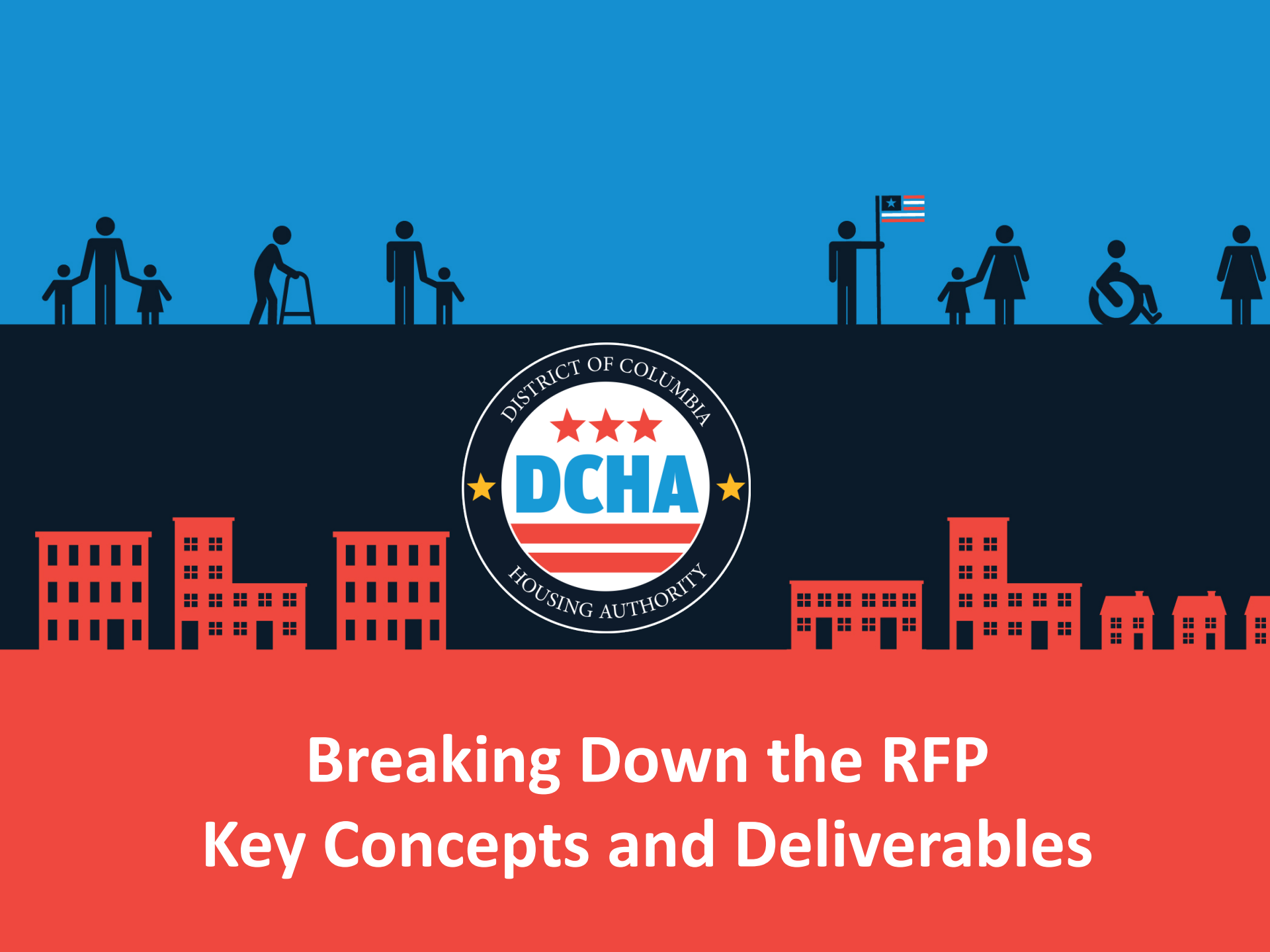
- **Preservation.** investments in capital and infrastructure upgrades to preserve DCHA's existing public housing.
- **Rehabilitation.** Comprehensive modernization efforts to existing structures. May utilize HUD tools like the **Rental Assistance Demonstration project** (RAD) to leverage private dollars.
- **Redevelopment.** HUD's **Section 18** demolition/disposition program can be used to unlock a combination of public and private dollars to develop new energy-efficient affordable and mixed income housing.

Collaboration with DC Government:

Building a Database | Finding the Resources

Understanding CARSS

- The District of Columbia's asset management system, also known as the Capital Asset Replacement Scheduling System (or **CARSS**), is a tool used by DC Government to standardize the evaluation of capital needs and the projected cost to repair or replace physical assets.
- This system forms the basis to develop the District's capital improvement plan as part of the budget process and to determine the cost of deferred maintenance for current assets.
- DCHA is collaborating with the DC Office of the CFO, and the DC Office of Budget and Performance Management to place DCHA's real estate portfolio into the District's CARSS system.
 - This establishes a framework for potential recurring DC capital funding contributions to DCHA's long-term deferred capital needs
 - Allows for multi-year capital planning.



Breaking Down the RFP

Key Concepts and Deliverables

Scope of Work

Physical Needs Assessment

- Evaluate the Existing Conditions of the Housing Stock
- Describe all physical improvements required to bring the property back to a level comparable to “as-built”
- Combine HUD PNA form and ASTM Uniformat II Classification for Building Elements into a single survey instrument.
 - Data entry to be consistent with HUD requirements as well as DC CARSS system
 - Provide estimate of Expected Useful Life (EUL) for each component
 - Evaluate DCHA’s compliance with Section 504 and UFAS compliance
 - Develop a Comprehensive Costing Library based upon cost data available through RS Means or other recognized third-party source data
- Minimum Inspection Requirements:
 - The greater of a) 20% of all apartment unit interiors (combination of vacant and occupied units) or b) three (3) apartment interiors per building on multiple building sites or single building projects with less than 15 units – *Except for Properties designated as RAD properties, where the minimum percentage shall be 25% of all apartment interiors*
 - 100% of all vacant units on all sites.
 - 100% of interior common areas (both public and private areas)
 - 100% of building systems and exteriors (including roofs, HVAC, boilers, etc. . .)
 - 100% of all site components (including, but not limited to walks, parking, drives, landscape, retaining walls, play areas, and fencing)

Scope of Work

Physical Needs Assessment

Prioritization of Each Work Item:

- **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
 - Prevents irreparable damage to a valuable public facility
- **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
 - Leverages available state or federal funding
- **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
 - Promotes intergovernmental cooperation
 - Reduces energy consumption
 - Enhances cultural or natural resources

Scope of Work

Energy Audit

- Evaluate the existing conditions of the housing stock in accordance with 24 CFR Part 965 and current Energy Code
- Identify Energy Conservation Measures (ECMs) and the potential cost savings that would result from implementing these measures.
 - Identify water and energy conservation measures
 - Identify ECM in PNA cost estimate as an alternate item
 - Calculate a simple payback schedule for each proposed ECM
- Analyze the utility bills provided by DCHA for the three (3) most-recent years; identify trends in energy consumption against benchmarks as a means to prioritize ECMs
- Analyze DCHA's housing portfolio against standards as set by DC Building Energy Performance Standards (BEPS)
 - Each building with an Energy Star score below calendar 2019 standard will be required to reduce its energy usage by 20% (measured by site EUI) in 2024 and 2025.
 - If recommended ECMs will not achieve reduction of site EUI by 20%, recommend additional ECMs that will achieve the goal.
 - Evaluate whether replacement of gas-fired equipment with electric equipment is practical (practicality will be based upon simple payback of less-than 25 years)
 - Evaluate whether renovations to achieve Passive House (PHIUS+) certification of the building is practical.
 - Evaluate whether installation of rooftop solar panels is practical.

PNA/EA Report Deliverables

- **Introductory/background section:**
 - summarizing the prior PNA and history;
 - past capital improvements;
 - assessment procedures, assumptions, and methods;
 - prioritizing system and approach;
 - cost-estimating methods and assumptions; and
 - explanation of and reference to the cost-estimating guide proposed.
- **HUD Form 52828, Physical Needs Assessment:**
 - color photographs and a detailed narrative describing the property's exterior and interior physical elements and condition, including:
 - architectural components, and
 - structural components, and
 - mechanical systems;
 - Include a section for the development that gives general information and descriptions of the development.
- **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,
 - brief recommendation, and
 - a cost estimate.
- **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.

PNA/EA Report Deliverables

- **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, lead-based paint, and environmental issues; or
 - systematic problems.
 - describe any Section 504 work items, energy conservation measures, and any environmental hazard (asbestos/lead-based paint) items.
- **A recommended Replacement Reserve Schedule.** The Replacement Reserve Schedule is to encompass the following:
 - **short life span** (immediate-1 year), (eg. exterior caulking, carpeting, pavement sealing and striping, domestic hot water heaters, etc.)
 - **medium life span** (5 years) (eg. cooling towers, paving, roofing, appliances, kitchen cabinets, etc.)
 - **long life span** (10 years) recurring systems and components. (eg. boilers, chillers, electrical systems, infrastructure components, supply and drainage piping, etc.)
- **Quantity and cost estimates** to accomplish:
 - each work item,
 - total for each project, and
 - grand total to accomplish all needed physical improvements.

All data will be entered into the HUD PNA tool and CARSS, sufficient to produce a 20-year cost projection of needs for each capital component.

PNA/EA Timeframe

Draft Report:

- **Phase 1 Projects - Draft Version Within ninety (90) days after the effective date of the NTP.**
- **Phase 2 Projects - Draft Version Within one-hundred thirty-five (135) days after the effective date of the NTP.**
- **Phase 3 Projects - Draft Version Within one-hundred eighty (180) days after the effective date of the NTP.**

Final Report:

- **Phase 1 Projects Final Version Within thirty (30) days after receipt of comments on the “Draft Version” of Phase 1 the PNA.**
- **Phase 2 Projects Final Version Within thirty (30) days after receipt of comments on the “Draft Version” of Phase 2 of the PNA.**
- **Phase 3 Projects Final Version Within thirty (30) days after receipt of comments on the “Draft Version” of Phase 3 of the PNA.**

Phase I: Extremely Urgent

Property Details

Number of properties

14

Number of units

2603

Number of residents

5047

Represents:

1. Judiciary House
2. Kelly Miller Townhomes | LeDroit Senior
3. Langston Additions
4. Kelly Miller Walkups | LeDroit Apartments
5. Langston Terrace
6. Benning Terrace
7. Stoddart Terrace
8. Fort Dupont Dwelling
9. Fort Dupont Additions
10. Garfield Terrace
11. Garfield Senior
12. Greenleaf
13. Richardson Dwellings
14. Woodland

Extremely urgent housing units are those in exceedingly poor and deteriorating condition. A unit is listed in the extremely urgent category for repairs when there are multiple conditions of disrepair. Moreover, repairs required rise beyond the level of Facilities Maintenance staff and are related to the infrastructure of the site

Phase II: Second Tier

Property Details

Number of properties

10

Number of units

2,420

Number of residents

XXX

Represents:

1. Claridge Towers
2. Highland Addition
3. Hopkins Apartments
4. James Creek
5. Kenilworth Court
6. Lincoln Heights
7. Potomac Gardens Senior
8. Potomac Gardens Family
9. Sibley Plaza
10. Syphax Gardens

Extremely urgent housing units are those in exceedingly poor and deteriorating condition. A unit is listed in the extremely urgent category for repairs when there are multiple conditions of disrepair. Moreover, repairs required rise beyond the level of Facilities Maintenance staff and are related to the infrastructure of the site

Phase III: Third Tier

Property Details

Number of properties

8

Number of units

1,039

Number of residents

XXX

Represents:

1. Carroll Apartments
2. Ft. Lincoln
3. Harvard Towers
4. Horizon House
5. James Apartments
6. Kentucky Courts
7. Knox Hill
8. Regency House

Extremely urgent housing units are those in exceedingly poor and deteriorating condition. A unit is listed in the extremely urgent category for repairs when there are multiple conditions of disrepair. Moreover, repairs required rise beyond the level of Facilities Maintenance staff and are related to the infrastructure of the site

Qualifications

- Five (5) years of experience performing physical property inspections and cost estimations of public housing developments in varied physical condition and age in the District of Columbia or in similar metropolitan area(s);
- Demonstrated knowledge of applicable multifamily building standards and codes; energy-efficiency practices; CARSS, and a working knowledge of commonly used computer technology (MS Office, Excel, etc.);
- Trained to evaluate building systems, health and safety conditions, and physical and structural conditions; and to provide cost estimates for maintaining, rehabilitating or improving deficiencies. Must also have expertise in environmental analyses and inspections (e.g. asbestos and lead testing).
- Demonstrated expertise with report production that are well regarded in the marketplace in terms of content, timeliness and responsiveness.
- Capacity to complete the project inspection and prepare the report in a time frame acceptable to the DCHA.
- **Specific Qualifications for the Energy Audit:** have the following acceptable certifications to include “energy auditor”, “certified energy auditor,” “certified energy manager,” “HERS Rater” issued by a state or national energy auditing certifying agency, such as the American Association of Energy Auditors (AEE), the Building Performance Institute (BPI), and the Residential Energy Services Network (RESNET);
 - The assigned inspector, not just the company, must have personal experience in conducting such audits.
- Firms must be financially sound to provide services.
- District of Columbia licensure as required.

Proposal Content

- Proposals shall not exceed thirty 30 pages, excluding the Price Proposal and supporting materials
- Proposals shall be submitted in two parts:
 - Part I - “Technical Proposal”
 - Part II - “Price Proposal”
- **Respondents shall submit one (1) original and one (1) electronic copy of both the Technical Proposal and Price Proposal**
- **The Technical Proposal and Price Proposal shall be submitted as separate electronic files attached to one email. The Technical Proposal shall not contain any pricing information.**

Proposal Format

- 8.5” by 11” letter-size paper, printed single-sided, bound length-wise and separated with tabs to identify sections.
- Proposals must include each item in the order outlined below in Sections C.6.2, C.7 and C.8.
- Each sub-section must be separated by tabs with sub-section headings.
- Technical Proposals are limited to thirty (30) pages excluding the Title Page, Table of Contents, Section Dividers, Exhibits and supporting documentation.
- Proposals shall be paginated and organized as described below.

Proposal Content

Table of Contents

- PART I: Technical Proposal:
 - Table of Contents
 - Letter of Interest
 - Documentation to substantiate each listed Evaluation Criteria
 - Experience
 - Financial Capacity
 - Professional Credentials
 - Ability to Do the Work
 - Demonstrated Understanding of the Services
 - References
 - Experience with HUD Section 3 and Section 3 Plan
 - Minority/Women / Business Enterprise (M/WBE)
 - Certifications and Affidavits
- PART II: Price Proposal:
 - Complete Exhibit 1 Price Proposal

Scoring

Experience

Proposal shall clearly outline the respondent's experience with performing PNAs for PHAs, the CARRS system and EAs.

This factor will be evaluated based upon evidence of the following:

- 1) Demonstrate a minimum of (5) years'-worth of experience in producing Physical Needs Assessments for comparable public housing authority portfolios. (5 points)
- 2) Demonstrate a minimum of (5) years'-worth of experience in working with the District of Columbia on Facilities Condition Assessments using the District's CARSS system. (5 points).
- 3) Demonstrate a minimum of (5) years'-worth of experience in performing cost-estimates for physical needs assessments. (5 points)
- 4) Demonstrate that personnel assigned to perform the EA have personal, professional experience to perform the Energy Audit. (5 points)

20

Scoring

Approach

Proposal shall clearly describe the respondent's approach to satisfying the Scope of Work.

Proposal shall clearly describe the respondent's approach to satisfying the Scope of Work. Description should include the respondent's approach to staffing, workflow, project coordination and the use of technology to complete the work within the assigned schedule and satisfying all of the requirements for compliance with HUD and the District of Columbia as described in the scope of work above.

This factor will be evaluated based upon evidence of the following:

- 1) Demonstrate an approach to successfully complete the data collection activities as described in the Scope of Work. (total available points 10)
- 2) Demonstrate an approach to successfully complete the PNA Report as described in the Scope of Work. (total available points 10)
- 3) Demonstrate an approach to successfully complete the Energy Audit as described in the Scope of Work. (total available points 10)

Points will be assigned for each of the three categories above based upon the following breakdown:

- a. Cite Three relevant examples from comparable projects of similar scope and duration (up to 10 points)
- b. Cite two relevant examples from comparable projects of similar scope and duration (up to 6 points)
- c. Cite one relevant example from comparable projects of similar scope and duration (up to 4 points)

Partial points may be granted to a respondent for citation of examples which clearly describe some but not all of the criteria listed in the scope of work.

30

Scoring

References and Professional Credentials

References:

Name the business name, address, phone numbers, and type of work performed with similar scope of work of no less than three references.

15

Professional Credentials:

Firm has all of the District of Columbia licenses as required. (5 points)

Firm meets requirements for scope elements related to the Energy Audit, 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). (5 points)

10

Scoring

Ability to Complete Work

Submit the firm's plan to comply with all services, deliverables, and the timeframe required in this RFP. Respondent must cite examples from other comparable projects within the past two (2) years to demonstrate its ability to perform within proposed budget and project timeline. Responses will be scored as follows:

- a. Three relevant examples from comparable projects of similar scope and duration (15 points)
- b. Two relevant examples from comparable projects of similar scope and duration (10 points)
- c. One relevant example from comparable projects of similar scope and duration (5 points)

15

Scoring

Section 3 and Cost

Section 3

1. Hiring Section 3 Residents- 6 Points
2. Contracting to Section 3 Business Concerns- 6 Points
3. Other Economic Opportunities- 4 Points
4. Past Performance- 4 Points

20

COST

Proposal shall include a fee proposal for completing the work. Cost proposal will be evaluated based on its value to DCHA. Price proposal offers the lowest discounted government rates.

30

Maximum Technical Points

140

Scoring

Bonus Points

BUSINESS ENTERPRISE DESIGNATION POINTS FOR SMALL MINORITY/WOMEN OWNED BUSINESS

- **Maximum 7.5 Points**
- DCHA will add additional points for Business Enterprise Designations after the technical evaluations have been completed and the competitive range has been established by the Contracting Officer.
- Upon determination of the competitive range, each Respondent who has been deemed technically qualified and is within the competitive range can receive additional points if the Respondent is determined to be a Small, Minority or Women-Owned Business Enterprise (S/M/WBE).
- The following definitions apply for the DCHA Business Enterprise Designation
 - “**Small**” means a firm with 500 employees or less.
 - “**Minority**” means 51% ownership.
 - “**Women-Owned**” means 51% ownership.
- The points shall be awarded to the Respondents based on a review of the Respondent, either party of a joint-venture, or a Respondent’s subcontractors.
- The points will be awarded in the following manner:

Small	= 2.5 points
Minority	= 2.5 points
Women-Owned	= 2.5 points

TOTAL MAXIMUM POINTS (including Bonus) 147.5 POINTS

Proposal Submission Date

- **All proposals must be received by 11:00 AM on Friday, May 1, 2020.**
- Respondents shall submit Proposal hardcopy in sealed packaging marked “**RFP 0018-2020 DCHA 2020 Physical Needs Assessment**” and addressed to:
District of Columbia Housing Authority
Office of Administrative Services, Contracts and Procurement
Suite 300
1133 North Capitol Street, N.E.,
Washington, D.C. 20002-7599
Attention: Cheryl Moore, Contracting Officer
- **The electronic submission of Proposals shall be emailed to Lolita Washington, Contract Specialist at lwashing@dchousing.org with copy to business@dchousing.org.**

Questions

All inquiries regarding this RFP and any correspondence relating thereto shall be submitted in writing to the Contracting Officer at the following:

District of Columbia Housing Authority
Office of Administrative Services/Contracts & Procurement
1133 North Capitol Street, NE, Suite 300
Washington, DC 20002-7599
Attention: Cheryl Moore, Contracting Officer
Email: chmoore@dchousing.org

Inquiries and/or questions concerning this RFP must be submitted in writing to the Issuing Office no later than Wednesday, April 15, 2020 by 11:00 AM.

- Please copy all inquiries sent to the Contracting Officer to the Contract Specialist responsible for this RFP, Lolita Washington by email to lwashing@dchousing.org and business@dchousing.org.
- Answers to questions will be provided to all Respondents being solicited, giving regard to the proper protection of proprietary information.
- Responses will post by addendum to the DCHA website www.dchousing.org under “Business” and “Solicitations”.