



GUAM HOUSING AND URBAN RENEWAL AUTHORITY

REQUEST FOR PROPOSALS

RFP#GHURA 23-13

**For Public Housing Physical Needs Assessment
and Energy Audit**

RFP Submission Deadline:

Monday, August 14, 2023
2:00 pm (ChST)

Guam Housing and Urban Renewal Authority (GHURA)

REQUEST FOR PROPOSALS (RFP)

Physical Needs Assessment and Energy Audit (2023)

PROPOSAL DEADLINE:

All proposals must be received at the following address no later than 2:00 p.m. Chamorro Standard Time (ChST), on _____.

PROPOSAL SUBMISSION:

To be considered, a proposal must be submitted via mail service or hand-delivered to the GHURA Administrative Office, located at 117 Bien Venida Avenue, Sinajana, GU 96910.

Hand-delivered or mailed responses must be in a sealed envelope with PNA & ENERGY AUDIT RFP Response noted on the envelope. Mail and hand-delivered submissions must arrive at GHURA by the time/date deadline noted above. Late responses will not be accepted.

All responses submitted are subject to these instructions and the Instructions to the Offerors, Non- Construction form [HUD 5369-B](#), contained in Appendix 2.

GHURA reserves the right to reject any or all proposals for cause and to waive any informality in the submission process if it is in the public interest to do so.

During the period between issuance of this RFP and the proposed due date, no oral interpretation of the RFP's requirements will be given to any prospective Offeror. Requests for interpretation (and other questions) must be made in writing at least 7 days before the submission due date and time to:

Antonio C. Camacho, Supply Management Administrator
Office of Procurement
GUAM HOUSING AND URBAN RENEWAL AUTHORITY
117 Bien Venida Avenue
Sinajana, GU 96910
sperez@ghura.org and accamacho@ghura.org

During the period of advertisement for this RFP, GHURA may wish to amend, add to, or delete from the contents of this RFP. In such situations, GHURA will issue an addendum to the RFP setting forth the nature of the modification. All addenda will be posted on the GHURA website at www.ghura.org or distributed to the prospective vendors, if known, via email.

RFP#GHURA 23-13
Physical Needs Assessment and Energy Audit

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Part I. Introduction and Overview

Guam Housing and Urban Renewal Authority (GHURA) is a municipal corporation created under the laws of the State of Washington. Its mission is to provide decent, safe, and sanitary housing for low-income families. GHURA receives funding from the U.S. Department of Housing and Urban Development (HUD) for the operation and modernization of low-income public housing owned by the Housing Authority.

HUD regulations require GHURA to undertake a Physical Needs Assessment (PNA) and an Energy Audit (EA) once every 5 years. In the near future, HUD is expected to require that the PNA be expanded to integrate with an energy audit, and it will be required to be performed using HUD's PNA tool software, also known as the "PNA tool." The software and user guide are currently available from the HUD Capital Fund web page: http://portal.hud.gov/hudportal/HUD?src=/program_offices/public_indian_housing/programs/ph/capfund/gpnatool.

This RFP requires that the selected Contractor follow the PNA protocol, use the PNA tool in the conduct of the PNA, prepare the data for submission to HUD by generation of the XML file in the tool and subsequent email of same to PNADATA@hud.gov, and provide GHURA with a written report and the completed PNA tool. During setup of the tool, the selected Contractor must work with the PHA to request and receive the PIC data import necessary to begin using the PNA tool. As discussed later in this RFP under 3.4. Deliverables and Timeframe, the Contractor will be required to assist the Housing Authority in successfully submitting the data to HUD.

HUD does not provide software for conducting the EA. Instead, the EA must be performed in a format of the Contractor's choosing, in accordance with the requirements listed at 24 CFR Part 965.302. This RFP allows the option for including the ASHRAE Level II audit as part of a combined solicitation.

The results of the EA should be loaded into and included in the PNA in accordance with the HUD PNA user guide.

Upon completion of the PNA, GHURA may then upload the PNA to HUD using the data contained in the HUD PNA software.

GHURA is seeking a professional consultant to undertake and complete the following according to HUD requirements and protocols, and including any supplemental services the PHA may request herein:

- PNA,
- Energy Audit, or
- Combined (PNA and EA).

Part II. Scope of Services

1. General Overview

1.1. GHURA hereby requests proposals from qualified firms and individuals to perform both a PNA and an EA in accordance with all current HUD regulations, the HUD PNA software (“tool”), forms, user guide, and other guidance as may be issued HUD from time to time.

1.2. The PNA and the Architectural/Engineer (A/E) will reflect 750 units in 4 projects from the GHURA portfolio as identified in Appendix 1 of this RFP. The projects in Appendix 1 that are the subject of the PNA and EA are to include both dwelling and non-dwelling spaces and buildings as well as roads and parking areas contained within each project.

1.3. Appendix 1 contains a list of all properties, by project, with date of construction, total number of units, and (separately) number of public housing Annual Contributions Contract (ACC) units and including a listing of other community facilities to be included in the assessment.

1.4. Appendix 1 also identifies, if applicable, any mixed-finance properties that contain public housing ACC units that are to be included in the PNA.

1.5. The results of the PNA and EA will provide GHURA with data to make both long- and short-term strategic decisions on its physical inventory and assist in obtaining financing.

2. Physical Needs Assessment (PNA) Scope of Work/Technical Specifications

The GUAM HOUSING AND URBAN RENEWAL AUTHORITY is seeking proposals from qualified and licensed entities to provide the following detailed services:

2.1. General Requirements: *In accordance with the PNA User Guide, and the Public Housing and Modernization Standards Handbook 7485.2.* The PNA and Energy Audit will be conducted in accordance with 24 CFR 905.300, 24 CFR Part 965.302, and energy codes. The selected Contractor will provide a full range of services including evaluating the existing conditions of the housing stock based upon a representative sample selection of buildings, units, common areas, and other GHURA physical facilities. The assessment will identify energy conservation measures and the cost-savings that result from implementing the measures, thereby reducing operating costs. All identified physical improvements will meet or exceed HUD mandatory standards, and those established by local and state health, safety, and building codes. At a minimum, the goal of the PNA is to identify and provide a description of all physical improvements that will be required to bring the property back to a level comparable with “as-built,” to the degree reasonably possible based on available components and building age. The effort should provide the GHURA with the information necessary to ensure long-term physical viability and in a manner suitable for planning and budgeting purposes. Data shall be in a format suitable for HUD reporting requirements.

2.1.1. Generally, identify deficient conditions, such as those that result from deferred maintenance, and building and life safety code noncompliance or obsolescence issues.

2.1.2. Perform interviews and review existing property documentation with knowledgeable GHURA staff, including building plans, building histories, prior assessments and energy audits, maintenance records, and Real Estate Assessment Center (REAC) scores of each development.

2.1.3. Identify all development components that will be part of the assessment.

2.1.4. Establish a methodology that will sample multiple like-kind buildings, and common areas such as lobbies, corridors, and community facilities.

2.1.5. Establish a plan to inspect the following:

- 10 percent of unit interiors.
- 10 percent of scattered site units.
- 100 percent of common areas.

The HUD PNA tool provides a general list of potential components to be assessed. Generally, components to be assessed are those for which replacement represents a significant capital cost eligible for funding from the HUD Capital Fund grant received by the PHA. The HUD list is not all inclusive and may not include significant components that will need assessment.

2.1.6. Perform walkthrough assessment/inspections of each development and other GHURA properties to ascertain the condition of the property; immediate critical and non-critical needs; general code compliance; expected repair, replacement, and major refurbishment needs; and total estimated cost to complete such items. The assessor will record the data on the HUD PNA approved data collection forms for the following: site, building exterior, building systems, unit, and common areas.

2.1.7. Identify work necessary to comply with federal, state, and local requirements and codes, such as elimination of asbestos/lead and new energy code compliance.

2.1.8. The assessor will provide and record an estimate of Expected Useful Life (EUL) for each individual component and will provide a source for EUL in general.

2.1.9. The assessor will provide and record a replacement unit cost for each individual component and for a total of those components. (e.g., per window and per window times all similar windows.)

2.1.10. Identify work items needed and costs for implementation to make selected units accessible and usable by the handicapped as required by Section 504 of the Rehabilitation Act of 1973. This will include costs to retrofit a specific number of dwelling units to meet Section 504 requirements for persons with disabilities. Each area that is designated as part of Section 504 or Americans with Disabilities Act (ADA) requirements will be inspected to ensure that the components are functioning according to their purpose. *(Note: A regulatory compliance review is not required for these units or areas; only a functionality and EUL assessment is needed.)*

2.1.11. Identify energy conservation measures and review energy audit reports to incorporate energy audit recommendations into the PNA. Evaluate options for increased energy efficiency.

2.1.12. The intent of the assessment is to perform a full evaluation based on visual observation of accessible areas. The assessor is not expected to perform destructive or forensic testing (opening wall cavities, cutting pipes, etc.) or to enter confined spaces. No destructive testing is to take place without prior written approval of the Housing Authority.

2.1.13. Any deficiencies identified that could have an impact on health and safety will be brought to the attention of the GHURA immediately by written and verbal notification as a matter of ensuring the safety of residents and housing authority personnel.

2.1.14. The selected Contractor will develop a Comprehensive Costing Library. Professional/certified cost estimating utilizing “R.S. Means” construction costing is preferred. Building a comprehensive cost and

EUL component library is vital to using the HUD PNA Tool. The comprehensive cost and EUL component library must contain descriptions and reference information.

2.1.15. Provide a detailed report for the GHURA development that details the assessment data. The selected Contractor will detail quantity and cost estimates to accomplish each work item, a total for each project, and a grand total to accomplish all needed physical improvements. *General work category (e.g., Kitchens, Bedrooms) costing without specific work item costing is unacceptable.* Provide individual cost tables and digital photographs to document notable conditions at each property. The Contractor shall show a line-item prioritization. The work shall include a review of any prior plans, recommendations, and a detailed report on items completed in the interim. The major part of the work consists of a thorough assessment of noted property, leading to a prioritized list of recommended improvements, plus a detailed physical database. Included is the identification of work that may be recommended to improve long-term viability, such as change in physical configurations, comprehensive revitalization with total demolition, and/or disposition. All data will be entered into the HUD PNA tool, sufficient to produce a 20-year cost projection of needs for each capital component.

2.1.16. The PNA will require the use of a HUD tool that can be found at the following HUD website address:

http://portal.hud.gov/hudportal/HUD?src=/program_offices/public_indian_housing/programs/ph/capfund/gpnatool.

The work performed by the Contractor under this solicitation must be in compliance with the proposed regulations as known at the time of this solicitation. Contractors shall ensure that data collected under this solicitation include all information required under the proposed rule and are sufficient to enter into the PNA tool. The Contractor shall include in its price all costs to complete the HUD PNA tool, as required. This rule revises HUD's energy audit requirements applicable to the Public Housing program for the purpose of clarifying such requirements, as well as identifying energy-efficient measures that need to be addressed in the audit and procedures for improved coordination with physical needs assessments.

2.2. Phases of Work: Work shall consist of three phases:

2.2.1. Pre-Assessment—focuses primarily on preparing for the assessment, as well as collecting and recording development data and utilizing architectural plan measurements and count data.

2.2.2. Assessment—focuses on helping you to identify all building components, including quantities of each present component; establish remaining useful life (RUL); and determine eligibility and cost of component refurbishment or replacement.

2.2.3. Post-Assessment—focuses on establishing industry-standard parallels through collection, review, data input, and report production.

2.3. Steps of Work: The steps involved include, but are not limited to:

2.3.1. Develop a detailed survey scope and survey methodology, pertinent to the collection of all assessment data and the information required to develop the database.

2.3.2. Survey existing physical conditions at the development, including but not limited to: the roofs, envelopes, windows, landscaping, streets/parking areas, sidewalks, etc.; the building interiors, including all finishes, fixtures, materials, and equipment; all common areas, including halls, lobbies, stairwells, etc.; crawl spaces, utility tunnels, etc.; and all mechanical, electrical, plumbing, and air conditioning systems, etc.

2.3.3. Interview resident representatives and maintenance and management staff; collect and record all relevant data.

2.3.4. Based on information gathered in the steps above, analyze the condition of all systems and components at the development and identify all capital improvements or modernization necessary.

2.3.5. Provide cost estimates for each item of recommended improvement, including units and unit prices where applicable.

2.3.6. Employ quantitative units in building the database wherever possible.

2.3.7. Review the GHURA's most recently available PNA to verify which items were completed and which items remain to be completed.

2.3.8. Prioritize each work item. There should be at least five (5) categories of priority, ranging from emergency, through urgent, to long-range.

2.3.9. To allow for future updates and modifications by the housing authority, the Contractor shall provide the entire plan in an electronic database format to facilitate the future updating of the facilities condition evaluations.

2.4. PNA Report:

Upon completion of the inspections, the selected Contractor will provide a report to the GHURA in narrative and spreadsheet forms that meets the GHURA requirements, in both paper and electronic format. This requirement also includes the XML report to be generated from the PNA tool for submission to HUD. The draft report will contain the PNA results, including ECMs from energy audits, and will be submitted to GHURA for review and comments.

The report of the PNA shall include:

2.4.1. An introductory background section, summarizing the prior PNA and history; the past capital improvements; the assessment procedures, assumptions, and methods; the prioritizing system and approach; the cost-estimating methods and assumptions; and an explanation of and reference to the cost-estimating guide proposed.

2.4.2. A separate HUD Form 52828, Physical Needs Assessment, for each asset management property/development assessed. Attach to each report color photographs and a detailed narrative describing the property's exterior and interior physical elements and condition, including architectural and structural components and mechanical systems. Include a section for the development that gives general information and descriptions of the development.

2.4.3. A listing of each issue of deficiency, by priority, giving at a minimum the system (HVAC, site, unit interior, etc.), a brief description of the problem, a brief recommendation, and a cost estimate.

2.4.4. An attachment that includes an overall listing of the recommended work items by priority, a copy of the survey form, and a listing of all the systems, components and subcomponents, and entry codes used in the database.

2.4.5. An Executive Summary summarizing major findings and recommendations plus any other major issues, including any repair items that immediately impact health and safety such as code violations; regulatory compliance issues such as relocation planning, asbestos-containing materials, lead-based paint, and environmental issues; or systematic problems. Also describe any Section 504 work items,

energy conservation measures, and any environmental hazard (asbestos/lead-based paint) items.

3. Energy Audit Scope of Work/Technical Specifications

Pursuant to 24 CFR 965.302, the GHURA is required to complete an energy audit for each housing authority-owned project under management not less than once every 5 years.

3.1. General Requirements: The Energy Audit will be conducted in accordance with 24 CFR Part 965 and energy codes. The selected Contractor will provide a full range of services including evaluating the existing conditions of the housing stock on the basis of a physical inspection of a representative sample. (Note: The Contractor will be expected to inspect a sample size comparable to that for the PNA described above; the inspected areas for purposes of the energy audit may be, but are not required to be, the same as those inspected for the PNA.) The assessment will identify water and energy conservation measures and the cost-savings that result from implementing the measures. All identified physical improvements will meet or exceed HUD mandatory standards and those established by local and state health, safety, and building codes. The Contractor shall enter the data into the PNA tool for each ECM considered sufficient to include the ECM as an alternate item on the cost projection and to calculate a simple payback for each considered ECM. Data fields required for each ECM are the general specification of the ECM, its cost, its estimated useful life, its estimated annual water/energy consumption, the utility rate applicable to the ECM, and the water/energy consumption of the component to be replaced by the ECM if applicable.

3.2. Scope of Services: Pursuant to 24 CFR 965.302, the GHURA is required not less than once every 5 years to conduct an energy audit. Specifically, the noted CFR states that each PHA:

“Shall complete an energy audit for each PHA-owned project under management, not less than once every five years. Standards for energy audits shall be equivalent to State standards for energy audits. Energy audits shall analyze all of the energy conservation measures, and the payback period for these measures, that are pertinent to the type of buildings and equipment operated by the PHA.”

The Contractor shall perform an energy audit comparable to the standard established by the American Society of Heating, Refrigerating, and Air-Conditioning Engineers (ASHRAE) Level II.

3.2.1. The objectives of the audits are to identify energy conservation measures (ECMs), to determine costs to implement each ECM, and to calculate the cost-savings that result from implementing the measures. Additionally, the audit should identify any compliance, health, or safety issues related to energy improvements. Each development will require conduct of a non-investment-grade energy audit and a report. HUD has published a proposed energy audit rule in the Federal Register (Public Housing Energy Audits, dated 11/17/2011) that provides standards that the Contractor shall use in the conduct of the energy audit. The Contractor shall also comply with The Public Housing Modernization Standards Handbook, 7485.2 REV-1, dated February 4, 1985, and with the HUD [Energy Conservation for Housing—A Workbook](#), January 1998.

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

3.3.1. The Contractor shall analyze the utility bills (list utilities used by the PHA) provided by the PHA for the three (3) most recent years for all common areas (PHA paid) and units (to the extent available). The analysis shall identify trends of consumption against a benchmark(s) to support the Contractor’s prioritization recommendations for actions such as implementing ECMs, maintenance activities, and/or resident education.

3.3.2. The energy walkthrough survey must include Core ECMs, which have a proven track record at reducing energy and water consumption. The Core ECMs include items related to building envelopes

(e.g., insulation); heating, cooling, and other mechanical systems; water conservation; power, lighting systems, and controls (e.g., CFL); and appliances (e.g., ENERGY STAR).

3.3.3. Review of all available building plans, specifications, product literature, and test and balance data to quantify building and equipment design criteria, parameters, and sizes. The review should also include architectural, mechanical, and electrical drawings and specifications for housing developments, administrative offices, and other buildings and identify whether any energy conservation measures, or energy-saving equipment is in use.

3.3.4. Collection of climatological data for the local area, to correlate energy usage to weather conditions.

3.3.5. Interviews of selected property, maintenance, and modernization personnel and residents to determine problem areas and concerns.

3.4. Advanced ECMs, which include advance, experimental, or difficult improvement items such as fuel conversion, conservation technologies (energy management systems), energy-generating technologies, and renewable energy systems (solar, geothermal), may be considered for supplemental feasibility study outside the scope of this contract.

3.5. The following tests are not required under the HUD standard and are included here as add options. (Delete paragraphs that do not apply.)

*Blower door/duct leakage testing on a sample dwelling unit at each development in order to determine air-sealing requirements. The tester must be HERS Energy Rater certified or equivalent. Equipment must be calibrated within 12 months of blower door test. Evidence of calibrated equipment may be requested.

*Carbon monoxide and gas leak detection on all units inspected that have natural gas or propane appliances/equipment.

*Thermal imaging tests on problem areas that are not accessible with visual inspection.

*Property surveys at various times during the day and night, or days of the week, to identify patterns of variable usage.

3.6. Report Documentation or Report Preparation: The Contractor shall develop a comprehensive Energy Audit Report for each housing development and submit to the GHURA. This report shall contain:

3.6.1. A summary of energy conservation measures studied and those recommended for implementation, by development.

3.6.2. A detailed description of each energy conservation measure, the cost to implement, the estimated annual savings that must result, and the average simple payback.

3.6.3. All energy-savings opportunities ranked according to their payback, by Project, starting with the quickest and ending with the longest payback.

3.6.4. Recommendations as to the order in which the recommended energy-savings opportunities should be implemented in order to provide the GHURA with a master plan of action.

3.6.5. Presentation of the interrelationships of the various energy conservation measures in a project so that the GHURA understands the impact that implementing each measure has upon the other proposed measures.

3.6.6. All backup engineering calculations, so that the Energy Audit Report can be readily updated each year to reflect changes in the cost of energy or the cost to implement the energy-savings measures.

4. Deliverables and Timeframe

4.1. The Contractor shall deliver the following, not later than 90 days from the effective date of the contract:

4.1.1. A briefing, at a time, date, and place determined by the GHURA, reflecting an overview of the Contractor’s findings based on the completed PNA and EA. At a minimum, the Contractor shall address the overall condition of each project listed in Appendix 1 and review the HUD PNA report to be submitted to HUD.

4.1.2. A full, bound hard copy of the results of the PNA and EA. This includes a separate report prepared for each development that includes a discussion of all building systems, photographs of representative interiors and systems, and a table showing immediate repairs and life-cycle component replacement.

4.1.3. A copy of the PNA tool with all of the GHURA PIC Data, Inspections, Master Cost Library, Replacement Needs, Refurbishment Needs, Sustainability Needs, Accessibility Needs, and Marketability Needs installed, if necessary.

4.1.4. A demonstration of technical assistance to GHURA staff regarding submission of the required reports to HUD, including the PNA and future annual updates. The Contractor shall provide no less than 2 hours of training to PHA staff to instruct them in the use of the PNA tool for ongoing management and annual updating.

4.1.5. This shall include the preparation of the initial XML submission (generated within the tool) and detailed instructions for how the KHA shall submit it to HUD, in accordance with HUD requirements at the time the submission is due. The Contractor shall also provide instructions or references to the procedure for applying annual updates for submission to HUD.

4.1.6. The Contractor will continue to provide GHURA staff with technical assistance until they are able to successfully submit the completed PNA file, which must be validated by HUD as a successful submission.

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

4.2. Time Completion Plan/Schedule (TCP/S): Offerors shall establish in the TCP/S the schedules/milestones shown below for the deliverables identified. In developing the schedule of milestones, the Contractor shall provide for thirty (30) calendar days for the GHURA to review, coordinate, and comment on draft deliverables.

Deliverables	Timeframes/Milestones
Physical Needs Assessment (PNA) – Draft Version	Within ninety (90) days after the effective date of the Notice to Proceed (NTP)
Energy Audit – Draft Version	Within ninety (90) days after the effective date of the NTP

Physical Needs Assessment (PNA) – Final Version	Within thirty (30) days after receipt of comments on the “Draft Version” of the PNA
Energy Audit – Final Version	Within thirty (30) days after receipt of comments on the “Draft Version” of the Energy Audit

4.3. All reports are to be sent to:

GUAM HOUSING AND URBAN RENEWAL AUTHORITY
 Attn: Elizabeth F. Napoli, Executive Director; and Sonny Perez, A/E Manager
 117 Bien Venida Avenue
 Sinajana, GU 96910
efnapoli@ghurq.org and sperez@ghura.org

Part III. Qualifications

In order to be considered qualified to perform the services under the Scope of Work, contractors performing the PNA/EA must have the following qualifications:

PNA:

- 1.State and local license as required.
2. At least 5 years of experience performing physical property inspections and cost estimations for PHAs; demonstrated knowledge of applicable multifamily building standards and codes; demonstrated knowledge of energy-efficiency practices; and a working knowledge of commonly used computer technology (MS Excel, Access, etc.).
 1. State and/or local license as required.
 2. Basic knowledge and experience to produce a useful and reliable energy audit.
 3. Certification (“energy auditor,” “certified energy auditor,” “certified energy manager,” “HERS Rater”) from a state or national energy auditing certifying agency. Acceptable certifications include those provided by the American Association of Energy Auditors (AEE), the Building Performance Institute (BPI), and the Residential Energy Services Network (RESNET).

Insurance Requirements:

The Contractor must demonstrate Worker’s Compensation Insurance and at least \$1,000,000 separately for both casualty and professional liability insurance.

Part IV. Proposal Submission

Proposals should be submitted in the following format, with Tabs separating each section:

1. Letter of Transmittal. A transmittal letter signed by the Contractor authorized to submit the proposal and to make commitments on behalf of the company.
2. Table of Contents. A table of contents shall be provided that lists each section of the proposal as required by Part IV of this RFP.
3. Organization History. Give a brief description of the firm and its history.
4. Qualifications. A description of the firm’s qualifications to perform the PNA and/or EA.

5. Experience. Provide a list of the organizations for which the Contractor has performed relevant work, going back at least 5 years. Particular emphasis should be on contracts with public housing agencies and performance of physical needs assessments and energy audits for properties of similar character to those of the subject PHA.
6. Staffing. Provide a list of staff members who will work on this contract, including principals and staff-level personnel, along with qualifications of each.
7. Evaluation Criteria. Provide information addressing each of the evaluation criteria.
8. Pricing. Provide pricing separately for the PNA, the EA, and Total Costs for providing the services covered by this RFP. Show each staff member, hours proposed, and hourly rates (fully loaded). Also show material and other costs, including travel, general, administrative, overhead, and profit.
9. References. Provide a list of clients, including the organization name, contact person, telephone number, and address as well as brief descriptions of the scope of work. (No fewer than three references and no more than five).
10. Other. Evidence of coverage as required under Part III and any other information the Contractor or GHURA deems relevant and would like GHURA to consider.

Part V. Evaluation and Selection

Basis for award. The contract will be awarded to the firm whose proposal is determined by GHURA to be the most advantageous to the Authority, with price and other technical factors considered.

Technical factors include:

1. Experience. Firm's experience in performing physical needs assessments and/or energy audits. Emphasis should be placed on experience with public housing agencies, performing physical needs assessments and energy audits.
2. Qualifications. Identify the qualifications of the principals and staff performing work. Staff members performing the PNA, or the EA must meet the qualifications listed under Part III.
3. Approach/Work Plan. Firms must identify how they plan to undertake the activities under the Scope of Services provided in Part II, and the proposed timeline.
4. Section 3 and Small, Minority- and Women-Owned Businesses.
 - Firms must provide documentation regarding their status as either a Section 3 business concern or a small, minority- or woman-owned business concern.
 - Firms must submit separate plans as to how they intend to meet the individual requirements of 24 CFR 135 to provide economic opportunities for low-income persons in the jurisdiction of KHA and 24 CFR 200 for small, minority- and women-owned business enterprises.

Relative weight of technical evaluation factors:

Factors	Points
1. Experience	35
2. Qualifications	20
3. Approach/ Work Plan	30
4. Section 3/MBE	15
Total Points:	100

Price will be considered in conjunction with technical factors by the GHURA to determine the proposal that is most advantageous and offers the best value to GHURA.

Part VI. Other Relevant Information

The contract executed pursuant to this RFP is deemed to include:

1. The specific contract document provided by GHURA.
2. This RFP in its entirety.
3. Required HUD forms:
 - Form HUD-5369-B, Instructions to Offerors – Non-Construction, is included in Appendix 2 and is part of this RFP. It is the Contractor's responsibility to carefully review the provisions.
 - Form HUD-5370-C, General Conditions for Non-Construction Contracts, Section I, is deemed to be a part of this RFP and the contract awarded under this RFP. The Contractor is expected to fully comply with this contract form.

The term of this contract is 150 days. There are no option periods unless unforeseen circumstances that are out of the control of the contractor and the GHURA occur that require an extension in order for the work to be completed.

The Contractor is expected to provide all labor and materials necessary to accomplish the Scope of Services contained in Part II of this RFP.

The Contractor will be paid upon completion of the contract and satisfaction of all contract and deliverable requirements contained in Part II, Section 4, of this RFP.

Appendix 1: List of Properties Covered by the RFP

AMP 1 Site Base:

Agana Heights – 38 units--duplexes, fourplexes
Asan – 26 units--two-story, two-story duplexes
Mongmong – 48 units--duplexes, fourplexes
Sinajana – 46 units--duplexes, fourplexes

AMP 2 Site Base:

Inarajan – 28 units--single, two-story duplexes/triplexes
Talofofo – 28 units--single, duplexes
Talofofo Elderly – 8 units--cluster
Yona – 99 units—single, duplexes

AMP 3 Site Base:

Agat – 99 units--single, duplexes
Agat Elderly – Lower-15 units--cluster; Upper-17 units--cluster
Merizo – 28 units--single, two-story duplexes/triplexes
Merizo Elderly – 9 units--cluster
Umatac – 27 units--single, two-story duplexes/triplexes

AMP 4 Site Base:

Dededo– 35 units--single, duplexes; 48 units--single, two-story duplexes, two-story fourplexes

Dededo Elderly – 33 units--cluster

Toto – 116 units--duplexes, fourplexes

Appendix 2: Form HUD 5369-B. Instructions to Offerors- Non-Construction

Available for review at <https://www.hud.gov/sites/documents/5369-B.PDF>

Appendix 3: Form HUD 5370-C. General Conditions for Non-Construction Contracts. Section I (6 *pages*)
Section II (3 pages)

Appendix 4:

Cost Proposal

The contractor shall propose a firm fixed fee for all work performed under this RFP. The fee will be broken down to reflect the fee for the PNA, Energy Audit, and total fee as reflected herein. The fee breakdown shall be inclusive of all costs, including but not limited to labor, material, supplies, and other costs. The fee shall be broken down by the component parts as follows:

PART A

Physical Needs Assessment

Total Cost. _____

Energy Audit.

Total Cost. _____

Grand Total Cost. _____

Firm/Company Name: _____

Firm's Authorized Representative: _____

Signature: _____

PART B – PNA Cost Proposal

A. Labor. Provide a breakdown for each position and for all positions combined.

POSITION	HOURLY RATE	ESTIMATED HOURS	TOTAL

(A) TOTAL LABOR COSTS: _____

B. Direct Costs. Direct costs are costs that can be identified specifically with a project and therefore are charged to that project.

Cost Element	Total
Materials	
Travel	
Miscellaneous Expenses	

(B) TOTAL DIRECT COSTS: _____

C. Indirect Costs, if applicable. Indirect costs are costs incurred for common or joint objectives and therefore cannot be readily and specifically identified with a particular direct project or activity.

Cost Element	Total
Labor	
Non-Labor	

(C) TOTAL INDIRECT COSTS: _____

D. Subtotal. Subtotal of all labor, direct and indirect costs.

SUBTOTAL: _____

E. General, Administrative and Overhead. State the percentage and total costs.

	Total
General	
Administrative	
Overhead	

(E)TOTAL GAO COSTS: _____

F. Profit. State the percentage and total cost.

Percentage: _____%	Total: _____
--------------------	--------------

(F) TOTAL PROFIT: _____

G. Total PNA Cost Proposed:

TOTAL ALL COSTS: _____

PART C – Energy Audit Cost Proposal

A. Labor. Provide a breakdown for each position and for all positions combined.

POSITION	HOURLY RATE	ESTIMATED HOURS	TOTAL

(A) TOTAL LABOR COSTS: _____

B. Direct Costs. Direct costs are costs that can be identified specifically with a project and therefore are charged to that project.

Cost Element	Total
Materials	
Travel	
Miscellaneous Expenses	

(B) TOTAL DIRECT COSTS: _____

C. Indirect Costs, if applicable. Indirect costs are costs incurred for common or joint objectives and therefore cannot be readily and specifically identified with a particular direct project or activity.

Cost Element	Total
Labor	
Non-Labor	

(C) TOTAL INDIRECT COSTS: _____

D. Subtotal. Subtotal of all labor, direct and indirect costs.

SUBTOTAL: _____

E. General, Administrative and Overhead. State the percentage and total costs.

	Total
General	
Administrative	
Overhead	

(E)TOTAL GAO COSTS: _____

F. Profit. State the percentage and total cost.

Percentage: _____%	Total: _____
--------------------	--------------

(F) TOTAL PROFIT: _____

G. Total Energy Audit Cost Proposed:

TOTAL ALL COSTS: _____

Appendix 5: Section 3 Certification

**CERTIFICATION FOR BUSINESS CONCERNS SEEKING SECTION 3
PREFERENCE IN CONTRACTING AND DEMONSTRATION OF CAPABILITY**

Name of Business _____

Address of Business _____

Type of Business: // Corporation // Partnership
// Sole Proprietorship // Joint Venture

Attached is the following documentation as evidence of status:

For Business claiming status as a Section 3 resident-owned enterprise:

- Copy of resident lease
- Copy of receipt of public assistance
- Copy of evidence of participation
- Other evidence in a public assistance program

For business entity as applicable:

- Copy of Articles of Incorporation
- Certificate of Good Standing
- Assumed Business Name Certificate
- Partnership Agreement
- List of owners/stockholders and % ownership of each
- Corporation Annual Report
- Latest Board minutes appointing officers
- Organization chart with names and titles
- Additional documentation and brief function statement

For business claiming Section 3 status by subcontracting 25 percent of the dollar awarded to qualified

Section 3 business:

- List of subcontracted Section 3 business(es) and subcontract amount

For business claiming Section 3 status, claiming at least 30 percent of their workforce are currently Section 3 residents or were Section 3 eligible residents within 3 years of date of first employment with the business:

- List of all current full-time employees
- List of employees claiming Section 3 status
- PHA/IHA Residential lease less than 3 years from date of employment
- Other evidence of Section 3 status less than 3 years from date of employment

Evidence of ability to perform successfully under the terms and conditions of the proposed contract:

- Current financial statement
- Statement of ability to comply with public policy
- List of owned equipment
- List of all contracts for the past two years

Authorizing Name and Signature

Attested by: _____