



REQUEST FOR QUALIFICATIONS

The East Bay Asian Local Development Corporation (Owner) is requesting qualifications related to the design, permitting and renovation of Madison Park Apartments, an affordable housing community located at 100 9th Street in Oakland. Responses are requested from qualified firms or individuals (Architect) to provide comprehensive design services for the project reflecting the following considerations:

1. PROJECT BACKGROUND

- A. Project Information.** The proposed project is the renovation of an occupied property located in downtown Oakland. The building was constructed in the early 1900's with seismic improvements and a moderate rehab occurring in 1995, and additional renovations in 2012. The property is listed on the National Register of Historic Places, and contains 98 affordable residential units, property management offices, and two community amenity spaces... The renovation scope will include replacement, repair, and/or upgrades to building systems as well as cosmetic improvements to the units and common areas. Total building size is approximately 52,937 gross square feet.
- B. Owner Background.** East Bay Asian Local Development Corporation (EBALDC) is a nonprofit community development organization who works with and for all the diverse populations of the East Bay to build healthy, vibrant and safe neighborhoods. Since 1975, EBALDC's has developed over 2,000 units of affordable housing and more than 300,000 square feet of community serving commercial space. We also provide more than 5,500 people annually with comprehensive services including employment support, housing stability, and financial services.

In 2013, EBALDC adopted our "Healthy Neighborhoods" framework, which is organized around the interconnected social, environmental and economic factors that determine the length and quality of an individual's life. Beyond merely providing housing units, we aim for each project we develop under the Healthy Neighborhoods framework to deliver a meaningful impact on "social determinants" such as education, transportation, economy, and health which will enable people to lead to healthier and more vibrant lives.

For more on EBALDC, visit: <http://ebaldc.org/>

- C. Schedule:** The preliminary timeline for this project is as follows:
- i. July 2017- Request qualifications from Architects.
 - ii. August 2017 - Architect Selection (see detail schedule in item 5.E.).
 - iii. August 2017- Contract with Architect. Begin Design work.
 - iv. September 2017 - Pre-Development General Contractor Selection.
 - v. December 2017 - Finalize scope and plans. Submit permit requests.
 - vi. January 2018 - Contract General Contractor for Construction.
 - vii. February 2018 - Financing Applications (non-competitive)
 - viii. April 2018 - Financing Commitments
 - ix. June 2018 - Close Financing. Renovation begins.
 - x. March 2019 - Renovation complete.



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- 2. PROPOSAL BACKGROUND.** The intent of this RFP is to have the firms under consideration specifically address the services required and provide a well-considered price structuring proposal for those services.

The owner is looking for a "turnkey" approach, where the architecture firm will provide the following (not listed in order of preference):

- A. Full service architecture and engineering (including structural, mechanical, electrical, plumbing, landscape, and other engineering as appropriate).
- B. Conceptual/schematic plans incorporating recommendations relative to the installation of different building systems that reflect the latest thinking in the field concerning affordable housing design.
- C. Design development and construction documents including detailed engineering that will serve as the basis for both bidding and construction by a general contractor.
- D. Recommendations relative to preserving the historic character of the building.
- E. The project may incorporate health goals during the development process to inform design decisions that will lead to measurable positive health outcomes. The architect may be asked to incorporate recommendations from this process into the design and rehabilitation of the property.
- F. The owner also may seek certification through one or more residential green building programs such as Green Point Rated, Enterprise Green Communities, and compliance with all applicable Cal Green requirements. The architect will participate in the process to certify the project, including managing the integrative design process, ensuring compliance with program requirements, and providing guidance on which credits to select for certification.
- G. The architect may be requested to participate in selection of construction firms that should be given an opportunity to bid on the project based on their reputation for quality, their experience (previous occupied multifamily rehab projects are given specific attention), and their reputation for on time and on budget performance.
- H. Preparation of necessary bid documents to be sent to construction firms for the project.
- I. The architect may be requested to participate in review of the bids received to assess the relative merits of each and assist the owner in awarding the contract, as well as in preparing (from a business perspective) an appropriate contract (owner will have legal representation).
- J. Regular site observations of the contractor and subcontractors during the construction phase, and sign off on construction drawings to assure that scheduled payments are made, with appropriate holdbacks, when predetermined work has been completed.
- K. Assistance with the government approval process (i.e., obtaining necessary permits and compliance with public financing requirements).
- L. Preparation of certain marketing materials for a preleasing and post completion leasing effort (e.g., renderings, both interior and exterior).
- M. Develop a standard fit out package for commercial tenant and a budget for the tenant with pricing for custom add-ons. Additional services may be requested for commercial tenant improvements.



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- N. Final sign off on the project, assuring that the final project represents what was originally conceptualized and captured in the contract documents.
- O. This project is expected to be completed by March 2019.

Additional Considerations:

- The exact scope of work will be finalized through negotiations between the owner and the architect.
- At all stages of the project, the Architect will be responsible for ensuring compliance with design requirements of funding agencies and government agencies as they may affect the building and unit design, including, but not limited to: the California Tax Credit Allocation Committee (TCAC), The United States Department of Housing and Urban Development (HUD), the Federal Home Loan Bank (FHLB), the City of Oakland Planning Department, Oakland Building Services, Oakland Fire Department, Oakland Public Works, and all other applicable local, state and federal building codes and requirements, including structural and accessibility standards. The Architect may be called upon to provide letters, certifications, representations, and other information in connection with project financing.
- The Architect will be expected to participate in a highly integrative design process involving multiple internal and external stakeholders including EBALDC Property Management, Facilities Management and Resident Services staff; as well as the property's residents, neighbors, and community partners, funders, and third-party consultants. The Architect is expected to participate in meetings and events related to resident engagement including community design charrettes.

3. Response. As this proposal covers renovations to an existing building, please answer the questions providing information to support renovations.

A. Provide the following information:

- i. Name of Firm
- ii. Complete Address
- iii. Single Point of Contact
- iv. Telephone Number
- v. Fax Number
- vi. Internet address
- vii. E-Mail address

B. Provide a General Statement of Qualifications that responds to the project background information given above. Please highlight qualifications related to these unique project features, as applicable:

- i. Occupied multifamily residential buildings.
- ii. Incorporating design requirements from numerous public finance agencies (tax credits, local, state, or federal loans or grants).
- iii. Experience with projects located in the City of Oakland and experience with Oakland Planning and Building code.
- iv. Affordable housing.
- v. Incorporating health goal considerations to project design.



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- vi. Compliance with residential green building certification programs including, but not limited to Green Point Rated, Enterprise Green Communities, and CalGreen.
- vii. Incorporating community design feedback processes into the final project.
- viii. Buildings with historic features.

C. Personnel

- i. List the professional and support positions and number of personnel in each position.
- ii. Provide an organizational chart, including resumes of all personnel who would be committed to this project. Provide specific information as to their experience on projects similar to this one. For the project manager and project architects identified as part of the project team, provide the name and phone number of two clients with whom the architect has worked on a similar project.
- iii. List proposed engineers and consultants outside your firm who could provide services not available in your firm. Provide specific information documenting their work on similar projects.

D. Mixed Use and Multifamily Residential Facilities

- i. Submit a list of all mixed use and/or multifamily residential projects your firm currently has in progress and the status of each.
- ii. For your last five mixed use or multifamily residential projects, provide the following:
 - 1. Name of project
 - 2. Project address
 - 3. Client contact
 - 4. Owner's total initial budget
 - 5. Total project cost
 - a. Number of change orders
 - b. Total cost of change orders
 - 6. Date that architectural services began
 - 7. Scheduled construction completion date
 - 8. Actual construction completion date
- iii. List three multifamily residential or mixed-use renovation, rehabilitation, or restoration projects that have a comparable scope, program, budget, or complexity as the proposed project. Please list the project personnel, including consultants, for those projects.
 - 1. At least one of these projects must be the work of the firm's staff member(s) and consultants proposed for the current project.
 - 2. At least one project must have been completed within the last five years.
- iv. Describe the exceptional features or qualities of multifamily residential facilities designed by your firm.



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- E. Special Design Concerns
- i. Detail your firm's experience with phased, occupied renovation projects.
 - ii. Explain how your firm ensures compliance with the Americans with Disabilities Act (ADA). Provide examples.
 - iii. The residential population of this building includes seniors and households with special needs. The unit mix is a combination of studio and SRO units. Please describe any specific experience your firm has in designing projects to serve these populations or designing units in an SRO setting.
 - iv. Efficient energy and water usage is a concern to the Owner. Please describe how your firm incorporates these aspects of design into its renovation work. Provide examples.
 - v. The owner is not contemplating a "historic" rehab, but wishes to explore opportunities to feature the building's rich history. The architect will be requested to offer thoughtful and creative approaches to incorporating design elements that celebrate that history. Explain any previous experience with projects involving historically valuable properties or incorporating design features for the purposes of highlighting historic elements of a project.
- F. Architectural / Engineering Service
- i. Provide information on your current workload and how you would accommodate this project.
 - ii. Include a detailed description of what investigative work you would conduct or request to ensure the design process is adequately thorough to inform an appropriate construction scope and budget.
 - iii. Propose the design schedule you would implement to meet the expected construction completion date. Describe any strategies you could use to accelerate schedule.
 - iv. Describe your method for consensus building, including your role, the methodology employed, the outcome, and a contact person for a recent project where you employed this method.
 - v. Describe the types of problems you have encountered on similar projects, and explain what you did to resolve the problems and what you would do differently to avoid such problems on future projects.
 - vi. Describe how your firm can add value to this project and the process and include examples of situations from comparable projects where the owner realized tangible value.
- G. Construction Administration
- i. Describe your firm's preferred approach to establish construction cost estimates.
 - ii. Describe any best practices practiced by your firm when reviewing submittals, change orders, and pay applications.



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H. Legal Concerns

- i. Explain the circumstances and outcome of any litigation, arbitration, or claims filed against your company by multifamily residential clients or any of the same you have filed against a multifamily residential client during the past 10 years.
- ii. Explain the circumstances and outcome of any litigation, arbitration, or claims filed against your company by any client other than a health care client or any of the same you have filed during the past 10 years.
- iii. Confirm your firm's ability to maintain the required insurance coverages indicated in Attachment D: Insurance Requirements.

I. Fees

- i. Owner proposes the following fee structure:
 1. Owner and Architect will enter into an agreement for Conceptual/Schematic Design services charged on a time and materials basis, with a guaranteed maximum not-to-exceed price.
 2. At the conclusion of the Conceptual/Schematic design phase, based upon the design, scope of work, and understanding of the project developed during this phase, the Owner and Architect will negotiate a contract for full service Architecture and Engineering (A&E) services through completion of the project (including completion of Bid Documents, Construction Documents, Construction Administration, and Closeout).
 3. The basis of the full service A&E contract shall be the AIA B101 contract with a guaranteed maximum not-to-exceed price.
- ii. In response to this proposal, please provide:
 1. Rate schedule and guaranteed maximum not-to-exceed price for Conceptual/Schematic Design services.
 2. Proposed fee structure for the full service A&E contract, including:
 - a. Basis of the fee (percentage of hard cost, rate schedule, etc.)
 - i. If proposing fee as a percentage of hard cost, provide a percentage or scale of fees (e.g., "X% fee for projects between \$Y and \$Z")
 - ii. If proposing a rate schedule, provide rate schedule to be applied and examples of fees from at least three recent projects with comparable scope and complexity.
 - b. Breakdown of fee percentage by design phase
 - c. Assumed consultants required, based on current project knowledge, and whether said consultants will be contracted by Architect or Owner
 - d. Other fee assumptions, including reimbursable rates, consultant overhead, and any exclusions

Scoring of RFQ responses will take into account the clarity, specificity, and transparency of the firm's methodology for structuring fees. At the conclusion of the selection process, fee proposal will be the basis for negotiating a contract between Owner and the selected Architect.



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4. **Proposal Submission.** Three (3) hard copies of the proposal shall be addressed and delivered in a sealed envelope to:

East Bay Asian Local Development Corp
Attn: Capri Roth
1825 San Pablo Ave, Suite #200
Oakland, CA 94612-1517

Proposals will be received until 5:00pm Pacific Time on August 9, 2017. Any bid received after that time and date will not be opened or considered, and will be returned to the bidder.

5. **Selection Process.** EBALDC will score the applications according to the criteria outlined in Attachment C: Scoring Criteria.
 - A. Based on the resulting scores, a short-list of no more than three applicants will be selected for interviews and further consideration and will be invited to tour the property.
 - B. EBALDC will arrange site tours and interviews for all short-listed firms. Following interviews, EBALDC will conduct reference calls using project contact information submitted in the qualifications package. EBALDC will rank candidates based on interviews, reference calls, and RFQ application score.
 - C. EBALDC will initiate negotiations with the highest-ranking firm to establish fee and contract terms for the project. In the event that no agreement can be reached to the satisfaction of both parties, EBALDC reserves the right to cease negotiation and commence negotiation with the next highest ranking firm under the same conditions.
 - D. Architect Selection Schedule:

i. RFQ Issued	July 27, 2017
ii. RFQ Proposals Due:	August 9, 2017
iii. Architect Interviews:	August 14-16, 2017
iv. Architect Selection:	August 18, 2017
v. Design Kick-Off:	August 21, 2017
6. **Inquiries.** Submit all questions, inquiries, or requests for clarification about the project in writing via E-Mail to Capri Roth, Project Manager, East Bay Asian Local Development Corp; croth@ebaldc.org.
7. **Attachments.** Please find attached for your further review and information:
 - A. Project Information and Assumptions, Photographs
 - B. Preliminary Renovation Scope
 - C. Scoring Criteria
 - D. Insurance Requirements



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Attachment A: Project Information and Assumptions, Photographs

Address:	100 9 th Street, Oakland, CA 94607
Site and Built Improvements:	
Site Configuration & size:	One parcel 0.34 acres in area. Approximately 37,555 sq. ft. of residential units plus 15,381 sq. ft. of residential common area.
Age:	Early 1900 date of construction; Seismic improvements and moderate renovation in 1995 and 2012.
Building Program:	Affordable housing community, offices, and community rooms
Residential Program:	98 affordable apartments; Studio (20), One (70), and Two Bedrooms (8)
Target Completion Date:	March 2019
Proposed Financing:	Low Income Housing Tax Credits Tax Exempt Bonds CA Dept. of Housing and Community Development City of Oakland Conventional or subsidized construction and permanent financing.



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1. Property as viewed from across 9th Street



4. Wheel chair ramp access at west perimeter



2. View north from southwest corner of the subject property



5. Signage at entrance



3. Partial view of west facade



6. Detail of windows and fire escapes



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Attachment B: Preliminary Scope Considerations

Site:

- Repair or replace site fencing and gates
- Improve building entry (e.g., landscaping, replace entry door)

Architectural Components:

- Exterior painting and waterproofing
- Investigate structural condition and provide structural retrofit as necessary. Note: a limited structural retrofit was conducted in 1995.
- Roofing repair or replacement
- Window repairs
- Doors and door hardware repairs
- Code compliance upgrade, including hardware at emergency exits

MEP Systems and Equipment:

- Investigate mechanical, electrical, and plumbing systems and repair/replace as appropriate
- Elevator overhaul or replacement including cab refurbishment
- Potential replacement of corridor and unit lighting with energy efficient fixtures
- Potential replacement of emergency and exit lighting
- Potential replacement of plumbing fixtures to low flow fixtures
- Repair or replace alarms at select emergency exit doors
- Upgrade security cameras to higher resolution system
- Add mechanical ventilation to laundry room
- Add utility sink in maintenance shop
- Connect thermostat in basement to common corridors above

Unit Interiors:

- Inventory condition of unit interiors and replace items as needed, including flooring, cabinetry, countertops, lighting and plumbing fixtures, window coverings, and appliances

Common Area Interiors:

- Replace corridor flooring and finishes
- Update common area lighting
- Redesign and modernize community rooms, lobby and common areas, and management offices
- Potential interior decorating scope, including indoor landscaping, furnishings, artwork, and framed historic photographs

Special Conditions:

- Potential accessibility improvements depending on scope and code requirements
- Compliance with requirements for a building listed on the National Register of Historic Places



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Attachment C: Scoring Criteria

Architecture & Engineering Team

Experience and qualifications of firm's proposed staff	8 points
Experience and qualifications of proposed engineering & consultant team	2 points
Firm's capacity to successfully complete the proposed project, based on current workload and track record of successfully completing comparable projects	2 points
Firm is a registered LBE/SLBE in the City of Oakland	2.5 points

Project Experience

Experience successfully completing projects of projects of comparable scope, budget, and complexity	5.5 points
Experience successfully completing projects permitted in the City of Oakland	3 points
Experience successfully completing occupied rehabilitation projects	3 points
Experience designing affordable housing projects	3 points
Experience designing projects involving public financing (such as low income housing tax credits, local, state, or federal loan or grant programs)	3 points
Experience completing projects with an Enterprise Green Communities certification or GreenPoint rating	2 points

Design Approach

Quality and appropriateness of firm's design based on past projects	3 points
Firm's experience working in a highly integrative design process including multiple stakeholders such as residents, community members, partner agencies, and consultants.	2 points
Firm demonstrates unique qualifications, approaches, knowledge, or understanding that will benefit the proposed project or owner/developer.	2 points
Examples or descriptions of previous projects involving historic buildings.	2 points

Cost & Fee

Evaluation of proposed fee structure	5 points
Firm's track record of designing projects with minimal hard cost increases and/or additional services	2 points

Total Possible Points

50



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Attachment D: INSURANCE REQUIREMENTS

Consultant shall procure, prior to commencement of service, and keep in force for the term of its contract, at Consultant's own cost and expense, the following insurance:

A. Commercial General Liability insurance specific to this Project including coverage for bodily injury liability and property damage liability, including coverage for Premises and Operations, Products and Completed Operations, Contractual Liability, Broad Form Property Damage (including completed operations), XCU, and Personal Injury Liability.

Consultant shall maintain policy with a limit of not less than \$1,000,000 each occurrence, \$1,000,000 general aggregate, and \$1,000,000 products/completed operations aggregate. The general aggregate limit shall apply separately to this location/project, otherwise the general aggregate limit shall be increased to twice the required occurrence limit.

B. Automobile Liability insurance, including all owned, non-owned and hired automobiles used by the Consultant or its agents in performance of its work with minimum \$1,000,000 combined single limit for bodily injury and property damage.

C. Worker's Compensation insurance as required by the laws of the State of California. Coverage will be provided with limits not less than \$1,000,000 for each accident, \$1,000,000 policy limit for bodily injury by disease, and \$1,000,000 for each employee for bodily injury by disease. A waiver of subrogation endorsement will be required. Borrower certifies that it is aware of the provisions of section 3700 of the California Labor Code, which require every employer to provide Workers' Compensation coverage, or to undertake self-insurance in accordance with the provisions of that Code.

D. Professional Liability insurance covering damages caused by an error, omission, or any negligent act in the minimum amount of \$1,000,000 if Consultant is required to perform design-build work.

The insurance required must be endorsed and have all the following conditions:

1. Owner, EBALDC, Project lenders and investors, and their officers, agents, and employees are required to be named as additional insureds in Consultant's Commercial General Liability and Automobile Liability policies.
2. Owner, EBALDC, and Project lenders and investors will be named as certificate holders.
3. Consultant must provide 30-day prior written notice of cancellation, termination or material change in coverage.
4. Insurer must carry an A.M. Best Rating of "A" or greater.
5. Consultant shall ensure that all subcontractors shall procure and maintain insurance subject to the same requirements as the Consultant, including Additional Insured requirements. Certificates from subcontractors must be provided to EBALDC upon request.