



## REQUEST FOR QUALIFICATIONS

For Professional Architectural Design and Engineering Services  
of Future Affordable Multifamily Housing Developments  
Led by Catholic Charities

January 31, 2019

\*\*\*\*\*

To: Prospective Design Consultants

Subject: Request for Qualifications for Professional Architectural Design Services  
for future affordable multifamily housing developments led by Catholic Charities

Issue Date: January 31, 2019

Due Date: Thursday, February 21, 2019, 4:00 p.m.  
*No faxed proposals will be accepted.*

Submit Proposals to: Catholic Charities  
Attn: Travis Phillips  
Director of Community Development and Housing  
2740 SE Powell Blvd.  
Portland, OR 97202  
503-688-2650 (Direct)  
[tphillips@ccoregon.org](mailto:tphillips@ccoregon.org)

Any questions or requests for clarification should be submitted in writing to Travis Phillips using the contact information provided above.

# TABLE OF CONTENTS

## **Introduction**

- A. *About Catholic Charities*
- B. *Notice*
- C. *Common Project Goals*
- D. *Overview of Future Projects*
- E. *Development Budget*
- F. *Project Schedule*
- G. *Selection of Firms/Teams and Contracts*
- H. *Proposal Solicitation Schedule*

## **SCOPE OF SERVICES**

- A. *Composition of Design Team*
- B. *Statement of Work*

## **SUBMISSION REQUIREMENTS**

- A. *Content Specifications*
- B. *Format Specifications*

## **PROPOSAL EVALUATION & AWARD**

- A. *Evaluation Process*
- B. *Potential Interviews with Firms/Teams*
- C. *Selection of Firm/Team*

## **POSSIBLE EXHIBITS**

- A. *Project Interest Summary (form included with RFQ)*
- B. *Resumes*
- C. *References*
- D. *Fees*

# Catholic Charities

## PROFESSIONAL ARCHITECTURAL DESIGN AND ENGINEERING SERVICES FOR FUTURE AFFORDABLE MULTIFAMILY HOUSING DEVELOPMENTS

### Introduction

#### A. About Catholic Charities

Catholic Charities was founded in 1933 to combat poverty and injustice throughout Western Oregon by providing professional, compassionate social services. Catholic Charities provides a broad array of programs and services to meet the basic needs of the most vulnerable people in our community, regardless of faith, and provide them with tools and support to improve their situations, and break free of poverty. In addition to a current portfolio of 17 properties encompassing over 700 units of affordable housing, Catholic Charities of Oregon (and its two related entities, Caritas Housing Initiatives, LLC, and Caritas Community Housing Corporation) is actively exploring new opportunities to address the housing needs of the communities we serve across the State of Oregon.

Catholic Charities places a high value on equity, diversity and inclusion; involving clients and other stakeholders in the design and decision-making process; and offering services in spaces that are safe and welcoming, accepting and comfortable, and reflective of our clients' various cultures, languages and backgrounds. When contracting with outside firms, Catholic Charities values the participation of target businesses, such as Minority-Owned, Women-Owned and Emerging Small Businesses (MWESB) as certified by the State of Oregon Certification Office for Business Inclusion and Diversity (COBID), and Section 3 businesses, as identified by the U.S. Department of Housing and Urban Development (HUD). Catholic Charities also values and encourages local businesses that understand service delivery to, and/or who have a work history with a communities of diverse genders, races, ethnicities, abilities, and socio-economic statuses, as well as those businesses whose ownership or workforce is representative of these historically underrepresented populations.

#### B. Notice

Qualifications are requested from professional firms or teams (also referred to as "Firm/Team") for the provision of architectural design and engineering services for future affordable multifamily housing developments led by Catholic Charities and its related entities. Catholic Charities will **accept proposals until Thursday, February 21, 2019, 4:00 p.m. via hardcopy or electronic delivery**. It is the proposer's responsibility to verify successful delivery. Catholic Charities is located at 2740 SE Powell Blvd., Portland, Oregon, 97202.

### **C. Common Project Goals**

1. *Fiscal Responsibility.* Use financial resources wisely and maintain project budgets and schedules.
2. *Operational Sustainability.* Use durable building materials and systems that will deliver low long-term operational costs and easy-to-maintain, functional, healthy, and efficient facilities.
3. *Economic Equity.* Promote and value opportunity and access in contracting and vending opportunities among historically underrepresented businesses and workforce.
4. *Client Diversity.* Provide program space that facilitates client comfort, acceptance, empowerment, solidarity, and access to opportunity.
5. *Livability and Productivity.* Provide space for residents and staff that facilitate livability, furnishability, and productivity while utilizing space and resources efficiently.

### **D. Overview of Future Projects**

Catholic Charities is exploring future development opportunities which may include feasibility studies, conceptual designs, and/or full architectural services. It is expected that most, if not all, projects will involve public sources of funds (such as city, county, or state bonds, Low Income Housing Tax Credits, federal rent assistance, and other resources) and accompanying requirements for compliance, reporting and other parameters. Future development opportunities may include the following projects, or other similar projects:

1. Acquisition and rehabilitation of existing 1950s/1960s garden apartment complex with 30-40 residential units in coastal Oregon. Rehabilitation would likely include repair/replacement of building cladding, upgraded insulation and other energy-efficiency upgrades, replacement of space heating equipment, renovation of and ADA improvements in property management and community facilities, and aesthetic or functional upgrades to residential unit interiors (such as kitchen/bath cabinet and fixture replacement, lighting fixture replacement, painting, and replacement of flooring materials).
2. Acquisition and rehabilitation of existing 1960s/1970s 11-story building with approximately 150 residential units in Eugene, Oregon. Rehabilitation would likely include repair/replacement of egress stairways, energy-efficiency upgrades, replacement of space heating equipment, renovation of and ADA improvements in property management and community facilities, and aesthetic or functional upgrades to residential unit interiors (such as kitchen/bath cabinet and fixture replacement, lighting fixture replacement, painting, and replacement of flooring materials).
3. Adaptive reuse of an existing historic office/service building on Catholic parish property in inner-southeast Portland. The existing early-1900s building is intended to be re-purposed as affordable and permanent supportive housing while retaining the historic exterior of the building. Additional rehabilitation is likely to include seismic upgrades, energy efficiency improvements and ADA improvements to the interior and exterior of the building. Creative approaches to space efficiency and per-unit costs are likely to be a priority, including consideration of alternative unit configurations (such as micro units, Single Room Occupancy-type units, units designed for co-housing, and/or shared bath or kitchen facilities). This project is anticipated to require extensive community engagement and outreach, both to the surrounding community and church leadership/parishioners.

4. New construction of a development in Happy Valley, Oregon, consisting of a 3-story apartment building with an elevator and approximately 60 units, and approximately four 2-story walk-up apartment buildings with 15-18 units each. The site would also include community space, property management offices, and surface parking. Environmental studies, traffic studies and engineering are expected to be required. Green building certification, such as Earth Advantage or LEED, are also expected to be required, although a target level of certification has not yet been identified.
5. New construction of a nearly one-acre development in southeast Portland consisting of approximately 60 units in a multifamily building served by an elevator and including community space, property management offices, and limited surface parking. Demolition of an existing 10-unit building and single-family building on site is expected. Environmental studies and engineering are expected to be required. Green building certification, such as Earth Advantage or LEED, are also expected to be required, although a target level of certification has not yet been identified.
6. Short-term rehabilitation of an existing 2-story four-plex in southeast Portland, with longer-term interest to plan demolition and redevelopment of the four-plex and two adjacent commercial properties. If combined, the total site area for development would total approximately one acre with a desire to create a mixed-use development which could serve permanent supportive housing uses (both residential units and service spaces) as well as some units for residents with less-intensive service needs. Environmental studies and engineering are expected to be required. Green building certification, such as Earth Advantage or LEED, are also expected to be required, although a target level of certification has not yet been identified.

This Request for Qualifications (RFQ) aims to identify Firms/Teams that share Catholic Charities values identified in Section A, have the ability to deliver common project goals identified in Section C, and demonstrate experience relevant to the projects Catholic Charities intends to undertake. For future developments, including ones outlined above and others not yet identified, Catholic Charities intends to contract with one or more Firms/Teams identified through this RFQ.

The scope of the work addressed through this informal request will be finalized during the programming phase prior to formal selection of Firms/Teams. The primary Catholic Charities contact will be Travis Phillips, Director of Community Development and Housing.

#### **E. Development Budget**

Development budgets (and/or predevelopment budgets) will be identified at which time any project is ready to move forward in its stage of development, generally split into three phases: conceptual exploration, pre-development, and development. Budgets may be refined and adjusted as programming is finalized and a scope of work for the project's development stage is determined with a Design Firm/Team. The Firm/Team may also work with a general contractor (selected by Catholic Charities or selected in consultation with the Firm/Team) to provide cost estimates based on current market conditions. It is Catholic Charities expectation that the Firm/Team will recommend cost effective strategies to ensure final development costs do not exceed available funds and will work with a general contractor to identify value engineering options, where necessary.

**F. Project Schedule**

Project schedules are to be determined based on available budgets and development resources (including availability of gap funding for development as well as organizational budget and grant resources for pre-development activity). Anticipated or targeted project schedules will be communicated to prospective Firms/Teams at which time a project is ready to move forward in its stage of development.

**G. Selection of Firms/Teams and Contracts**

At which point a project is ready to move forward, Catholic Charities intends to select Firms/Teams for each project from those responding to this RFQ. At which time a team is chosen, Catholic Charities or one of its entities will work with the Firm/Team to finalize an agreement containing pre-construction and construction services, as appropriate for the identified scope of the project. Authorization to proceed with a subsequent phase will occur in a phased process after successfully negotiating the scope and cost of the work for each project.

**H. Proposal Solicitation Schedule**

Catholic Charities reserves the right to deviate from this schedule.

<b>[Proposal Solicitation Schedule]</b>	
Informal Proposal Request - Issue Date	01/31/19
Proposals Due	02/21/19
Interviews (Tentative)	Week of 03/04/19

Selection of Firms/Teams and contract execution will follow as development projects advance to stages where architectural design and engineering services are desired or required.

## SCOPE OF SERVICES

### A. **Composition of Design Team**

When responding to this Solicitation, Firms/Teams shall identify the Architect and primary staff who are anticipated to be responsible for specific project elements:

- Engagement and coordination of sub-consultants and subcontractors necessary to complete the work. Please include any supplemental information that helps demonstrate engagement or utilization of Target Firms as described in the Introduction section of this RFQ.
- Sustainable design, including measures to deliver superior indoor air quality, emphasize durability and reduced maintenance needs, and maximize energy and water efficiency during operations
- Community engagement and outreach
- Cost estimating
- Value engineering
- Budget tracking and control
- Identification, tracking and control of project schedule(s)
- Managing for the Common Project Goals outlined in the Introduction section of this RFQ
- Quality assurance/quality control

### B. **Statement of Work**

At the point a project is ready to proceed, Catholic Charities will notify one or more interested and responsive Firms/Teams and request additional detail necessary, including proposed fees, to select a Firm/Team for the project. Services requested will generally be grouped into one or more of three phases:

Conceptual exploration, including architectural services and limited engineering services necessary to:

- Complete feasibility studies, identifying site, zoning and land use constraints and opportunities, and other potential development challenges
- Identify highest and best uses for a property identified for a project, in addition to recommendations to best compliment surrounding uses and serve project or funding goals
- Develop a preliminary site plan (or multiple plan options, as appropriate) and development program
- Host required or requested community and stakeholder engagement activities
- Create conceptual drawings and/or renderings needed to secure interest from funding partners and feedback, buy-in, and/or approval, as needed, from stakeholders

Pre-development/pre-construction, including all architectural/engineering services necessary to:

- Obtain accurate contractor estimates/bids
- Provide drawings, documents, specifications, and other details required by public and private financial partners' in the course of their due diligence
- Accomplish required or requested community and stakeholder engagement activities
- Submit for and obtain building permits

Development and construction, including all architectural/engineering services necessary to:

- Complete the work, including appropriate allowances for regular meetings and other site visits, responses to contractor questions and RFIs, and coordination as needed with required inspections
- Traditional construction management services typically associated when working with a Construction Manager/General Contractor (CM/GC) firm.

The exact scope and schedule for any services will be determined during programming.

## SUBMISSION REQUIREMENTS

### A. Content Specifications

To be considered responsive and responsible, each Firm/Team shall respond to the following requirements:

#### 1. Cover Letter

Introduce your Firm/Team and describe relevant or unique aspects of your business philosophy and design approach. Identify the Firm/Team's primary point of contact, Principal and/or Project Architect, and any key consultants. An authorized representative of the Firm/Team shall sign the letter.

#### 2. Team Description

- a. Present current staffing level and information (if relevant) about preferred/required project size or type. If Firm/Team availability is impacted by known or anticipated workload and projects, include relevant information. Include information about known or anticipated participation of, or proposed outreach to, Target Firms and workforce as identified in the Introduction section of this RFQ.
- b. Narrative and/or graphic that identifies the key personnel at the corporate and field levels of each firm who would be assigned to a project during pre-construction and construction phases. Catholic Charities is aware that this may be subject to change based on project type and timing.
- c. Resumes for key personnel that include each individual's education, work history, length of tenure with the firm, and relevant experience working toward the stated project goals. *Resumes will not be included in the page count if they are provided as an exhibit.*

#### 3. Portfolio/Similar Project Experience

Describe the Firm's/Team's recent experience (within the past five years) providing design and construction services for at least three (3) but no more than four (4) projects that are relevant to the work contemplated in project descriptions noted in this RFQ. Relevant characteristics are building size and scale; community engagement and outreach (indicate what was required for the project and additional, if any, engagement performed); design quality, construction quality; team structure; and designing for the Common Project Goals stated in the Introduction section of this RFQ.

Provide the following information for each project:

- a. Narrative description of the building with a focus on similarities to projects described in the Introduction section of this RFQ's Overview of Future Projects, noting which Catholic Charities project(s) are most relevant to the Firm's/Team's project(s). Include, as applicable, size of project in square feet, number of residential units and amount of commercial/retail space, construction type, building systems, construction challenges and solutions, significant sustainability achievements.
- b. Total construction cost; cost per square foot.
- c. Key project dates, such as commencement of design work, submission/approval of permits, start of construction and construction completion. Approximate dates (such as "February 2017" or "First quarter 2017") are acceptable, but please be as specific as possible.

Please include brief responses to the following in your proposal.

- a. Describe the Firm's/Team's qualifications and experiences as a Target Business or contracting with Target Businesses. Include any organizational policies that establish goals for Target Business participation and the organization's history of meeting those goals.
- b. Describe the methods that will be used to solicit and encourage participation by Target Businesses as subcontractors.
- c. Describe the methods the Firm/Team will use for maximizing employment of women and minorities on the project, including methods for ensuring subcontractor's participation and compliance with these employment goals and requirements.

#### 4. **Project Approach**

Describe the Firm/Team's approach to completing the work. Address both pre-construction and construction activities. This section provides an opportunity to present detailed project management strategies. Include the following elements:

- a. **Budget Control.** Explain how the Team will approach design, cost estimating, value engineering, and construction to complete a project within its established budget. Describe the Team's approach to determining whether project changes are inside or outside the GMP.
- b. **Schedule Control.** Provide a preliminary high-level description of how the Team will adopt a project schedule and how the Team works to maintain a schedule once it has been adopted.
- c. **Community, Staff and Stakeholder engagement.** Describe the approach and process to gain community, staff and stakeholder perspectives and buy-in.

#### 5. **Rates/Fees**

Include hourly rates for all potential or anticipated team members and any discounts or pro bono service that may be available to Catholic Charities as a not-for-profit charitable organization. Include description of any anticipated parameters for discounts or pro bono services (such as: "pro bono work is limited to 15 hours during conceptual exploration phase", or "credit will be applied at the conclusion of schematic design", etc.). Once a project scope has been identified, selected Firms/Teams will be asked to provide a fee proposal specific to the project. *Hourly Rates will not be included in the page count if they are located in an exhibit.*

## **B. Format Specifications**

Each proposal shall comply with the following specifications:

- 8.5" x 11" format, either vertical or horizontal with font size no smaller than 10 points.
- The proposal should not exceed 10 pages. The page limit does not include front and back covers, section dividers, or items noted for inclusion in an exhibit. *If the proposal is delivered in original hardcopy format, do not bind the original. If the proposal is delivered in electronic format, documents should be in Adobe PDF file format. Do not include .ZIP files.*
- The proposal shall be enclosed in an envelope/email message marked with the project title/subject line: "Catholic Charities 2019 Architecture RFQ", and with the name and information of the primary Design Firm/Team contact. If emailed, links to online storage locations (such as Sharefile or Dropbox) are acceptable.
- Catholic Charities will make reasonable attempts to confirm receipt of each proposal, but it is the proposer's responsibility to verify successful delivery.

## **PROPOSAL EVALUATION & AWARD**

### **A. Evaluation Process**

The following process will be generally followed for the evaluation and award of a contract.

1. Evaluate proposals
2. Potential interviews with Firms/Teams
3. Selection of Firm/Team

Catholic Charities reserves the right to investigate the qualifications of all Firms/Teams under consideration and to confirm any part of the information furnished by a Firm/Team, or to require additional evidence of capabilities that are considered necessary for the successful performance of the work.

### **B. Potential Interviews with Firms/Teams**

Firms/teams may have an interview approximately one week after proposals are received, or interviews may be postponed until such time that a project is more clearly identified. Interviews are expected to include Catholic Charities Housing Development staff, as well as members of Catholic Charities Volunteer Housing Committee, with possible representation from key stakeholders, such as residents/management of existing buildings or interested funders.

### **C. Selection of Firm/Team**

At the point a project is ready to proceed, Catholic Charities will contact interested and responsive Firms/Teams to provide additional details of project elements and timelines, as well as reassess Firm/Team interest and capacity. Catholic Charities may request additional information from any Firm/Team at this stage. Catholic Charities will provide notice of award to Firm/Team selected for a project and will execute a contract with relevant details at this time.

## POSSIBLE EXHIBITS

- A. **Project Interest Summary (form included with RFQ)**
- B. **Resumes**
- C. **References**
- D. **Fees**

# Catholic Charities

## RFQ FOR PROFESSIONAL ARCHITECTURAL DESIGN AND ENGINEERING SERVICES EXHIBIT A: PROJECT INTEREST SUMMARY

**FIRM/TEAM NAME:** \_\_\_\_\_

**Preferred Regional Focus:** Check all that apply

- City of Portland
- Portland Metro
- Oregon Coast
- Southwestern Oregon (West of Cascades, from Eugene further south)
- Willamette Valley (Between Portland and Eugene, West of the Cascades)

**Preferred Construction Types:** Check all that apply

- New Construction
- Rehabilitation
- Adaptive reuse
- Conceptual design and/or land use/pre-development planning only

**Preferred/required project size** (Specify metric: units, scale/height, square footage, project cost, other):

Minimum: \_\_\_\_\_

Maximum: \_\_\_\_\_