

August 1, 2024

# SUBJECT: HACM-RFP-2024-04 Stairwell Replacement Services for Pueblo Del Mar Apartments

The Housing Authority of the County of Monterey ("HACM") invites proposals from qualified contractors for the replacement of stairwells within the Pueblo Del Mar Apartments, located at 17 Regiment Ct. Marina, CA ("PDM").

Proposals will be accepted by mail or by email until 3:00 pm, (PST), on September 03, 2024 Proposals received after 3:00 pm, on September 3<sup>rd</sup> ,2024 will be rejected without consideration.

Questions of a procedural nature may be directed to Delayna Cambunga at (831) 775-5064
Or Pablo Verdugo at (831) 775-5070
We look forward to receiving your proposal.



#### REQUEST FOR PROPOSALS HACM-RFP-2024-04

## Stairwell Replacement Services for Pueblo Del Mar Apartments

RFP Issued:	August 1, 2024
MANDATORY Pre-Proposal Conference	August 13, 2024 at 11:00 AM (Pacific Time)
Questions Due	August 15, 2024 by 10:00 AM (Pacific Time)
Email Questions To:	dcambunga@hamonterey.org (Indicate above HACM-RFP-2024-04 in "Subject")
Proposal Due:	September 3, 2024@ 3:00 PM (Pacific Time)

Contact person for the above RFP: Delayna Cambunga,

<u>Procurement and Contract Manager</u>

Email: dcambunga@hamonterey.org or pverdugo@hamonterey.org

Contact info for Project Manager: Ricardo Calderon
Email: rcalderon@hamonterey.org
Phone: 831- 970-9561

## REQUEST FOR PROPOSALS HACM-RFP-2024-04

## **Stairwell Replacement Services for Pueblo Del Mar Apartments**

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	1. Proposal Format	
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	<b>2.</b> Required Forms/Certifications (All forms attached – except addendum acknowledgement. This will be issued if an Addendum is issued)	
	<ul> <li>A. Profile and Certification/Qualifications (<u>See Exhibit E</u>)</li> <li>B. Section 3 Requirement and Action Plan (<u>See Exhibit F</u>)</li> <li>C Form HUD-5369-A (<u>See Exhibit G</u>)</li> <li>D. Sample Addendum (<i>if applicable</i>) (<u>See Exhibit H</u>)</li> </ul>	
	EXHIBITS	
A.	Scope of Work by Project Manager	
B.	Location Map & Aerial Photos for PDM	
C.	Capital Needs Assessment	
D.	Proposed Cost Form	
E.	Profile and Certification/Qualifications Form	
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#### 1. **GENERAL INFORMATION**

#### 1.1 RFP Introduction

The Housing Authority of the County of Monterey ("HACM") through this Request for Proposals ("RFP") invites proposals from qualified and licensed contractors (each, a "Respondent") to repair and replace the stairwells of PDM (a "Proposal").

All Proposals submitted in response to this RFP must conform to all the requirements and specifications outlined within this document in its entirety and any designated exhibits.

#### 1.2 **HACM Reservation of Rights**

- HACM reserves the right to amend through addenda, to reject any or all Proposals, to waive any informality in the RFP process or to terminate the process at any time, if HACM deems it necessary or in its best interests.
- HACM reserves the right not to award a contract pursuant to this RFP.
- HACM reserves the right to terminate a contract awarded pursuant to this RFP at any time for its convenience upon ten (10) days written notice to the successful Respondent(s).
- HACM reserves the right to retain all Proposals submitted and not permit their withdrawal, unless authorized in writing by HACM's Procurement Contracts Manager, Delayna Cambunga for a period of ninety (90) days following the bid deadline.
- HACM reserves the right to determine the days, hours and locations that the successful Respondent(s) shall provide the services called for in this RFP.
- HACM reserves the right to negotiate the fees proposed by the proposed entity.
- HACM reserves the right to reject and not consider any Proposal that does not meet the requirements of this RFP including, but not necessarily limited to, incomplete Proposals and/or Proposals offering alternate or nonrequested services.
- HACM shall have no obligation to compensate any Respondent for any costs incurred in responding to this RFP.
- At any time during the RFP or contract process, HACM may prohibit any
  further participation by a Respondent or reject any Proposal submitted that
  does not conform to any requirements detailed herein. Each prospective
  Respondent is hereby agreeing to abide by all terms and conditions listed

within this document and further agrees that the Respondent will inform the Interim Procurement Contracts Supervisor in writing within five (5) days of the discovery of any item listed herein or of any item that is issued thereafter by HACM that the Respondent believes should be addressed. Failure to abide by this time frame shall relieve HACM, but not the prospective Respondent, of any responsibility pertaining to such issue.

- Proposed prices must be firm for ninety (90) days from the date of responding to this RFP.
- HACM is subject to the disclosure requirements of the California Public Records Act. This act will apply to all submitted Proposals to HACM.
- No conversation with any officer, employee, agent or consultant of HACM, either before, during or after the execution of the contract, affects or modifies any terms or obligations contained in the contract documents, nor entitles successful Respondent to any adjustment in the contract time or contract sum whatsoever.

#### 1.3 **HACM Information**

HACM was established in 1941 under the authority of the Health and Safety Code by a Resolution which identified a need for safe and sanitary low-income housing, by the Monterey County Board of Supervisors. HACM provides rental subsidies, manages and operates affordable housing units, and develops affordable housing to assist low-income and moderate-income families, seniors and persons with disabilities living in Monterey County, California.

#### 2. SCOPE OF WORK

It is the intent of this RFP to establish a term contract with a vendor or multiple vendors for HACM for labor, materials and equipment necessary to provide Stairwell Replacement Services for PDM.

Through a competitive qualification and bid-based procurement process, HACM intends to enter into an agreement with a qualified vendor for these Stairwell Replacement Services.

All work is to be performed according to industry standards and to the requirements and satisfaction of HACM. The scope of work is summarized in <u>Exhibit A</u> attached hereto by our Project Manager, Ricardo Calderon (the "Stairwell Replacement Services").

PDM, located in Marina, California and constructed circa 1980, is a 56-unit, residential complex made up of 10 buildings plus a community center. PDM serves families in recovery by providing safe, affordable, transitional housing programs to families who are committed to the recovery process, here in Monterey County. Residents are able to build social networks and support a system designed to foster positive lifestyles.

The townhomes are all 2 bedroom/ one bath units, including 2 designated handicap accessible units. The community sits on level ground, with wood framed buildings and stucco exterior. Of the 10 buildings, 4 have had new roofing installed, while the other 6 should be replaced. There is one entrance to the homes off of MacArthur Drive.

The work is expected to largely include the items identified in the "Capital Needs Assessment Report" prepared by the CNA Specialists dated September 2023, attached hereto as <a href="Exhibit C">Exhibit C</a> (the "Capital Needs Assessment"). The scope of work will be precisely determined by the Capital Needs Assessment as well as guidance from our Project Manager.

It is anticipated that to the greatest extent feasible, the project will remain occupied during the renovation work. Depending on the level of interior renovation, a portion of the units may be vacated for a period of time to upgrade the interior finishes. The work is estimated to be completed within 3 – 6 weeks. Relocation, as required, will take place immediately preceding and throughout the construction period for this project. HACM and the property manager will manage the relocation process, as needed. Renovation is planned to be implemented in a single phase, with work planned, staged and sequenced in advance as necessary to reduce disruption to residents. Respondent is expected to participate in the staging and planning of the relocation/staging/construction process.

The following existing design documents can be found in the Exhibits as follows:

- 1. Scope of Work by Project Manager Exhibit A
- 2. Location Map & Aerial Photos Exhibit B
- 3. Property Assessment for PDM prepared by the CNA Specialists <u>Exhibit</u> C

Estimated Duration: 3 - 6 weeks

During the Construction Phase, the Respondent shall, as applicable:

- 1. Attend regular meetings with the Ricardo Calderon Project Manager and HACM;
- 2. Participate in the development/modification of the plans and specifications for the project, including evaluations of constructability, cost and design conflicts;
- 3. Conduct pricing of the project improvements at key milestones (Schematic Design completion, Design Development Completion, and 50% Construction Documents) in the development of the plans and specifications;
- 4. Engage in value engineering activities to assist HACM in ensuring that the final plans and specifications describe a project that can be completed within HACM's budget;
  - 5. Obtain a comprehensive bid for the final plans and specification;

- 6. Assist HACM with obtaining all necessary permits;
- 7. Bid to suppliers and subcontractors;
- 8. Coordinate all trades required for proper execution;
- 9. Facilitate/coordinate preparatory meeting with key subcontractors;
- 10. Coordinate with HACM on resident relocations;
- 11. Coordinate plans and sensitivity studies of the surrounding neighborhoods, if needed;
- 12. Provide meeting management and detailed reporting;
- 13. Exercise document control;
- 14. Enforce all COVID, OSHA and client-specified safety rules and regulations;
- 15. Mitigate delays and additional costs;
- 16. Assure the quality of the product;
- 17. Facilitate the closeout/warranty period of the project;
- 18. Address warranty issues in a timely, organized manner;
- 19. Assist with obtaining final building permit sign-offs; and
- 20. Comply with HUD Section 3 requirements and Davis-Bacon, including submission of timely reports and certified payrolls.

#### 3. PROPOSAL SUBMISSION REQUIREMENTS

HACM intends to retain the successful Respondent(s) pursuant to a "Best Value" basis, not a "Low Proposal" basis ("Best Value," in that HACM will consider factors other than just cost in making the award decision). Therefore, so that HACM can properly evaluate the offers received, all Proposals submitted in response to this RFP must be formatted in accordance with the following sequence. None of the proposed services may conflict with any requirement HACM has published herein or has issued by addendum.

#### 3.1 Proposal Format

To provide objective criteria that can be used in determining various Respondents' abilities, please address the following items in the order

presented. Exhibits, such as resumes, proposed fees or any other documents of a related nature developed by the Respondent may be attached. The Respondent may include any other general information that the Respondent believes is appropriate to assist the HACM in its evaluation.

HACM will not provide any reimbursement for the cost of developing, presenting or providing any response to this RFP.

#### A. Letter of Interest

Please provide a letter of interest on the Respondent's letterhead, which includes the location of the Respondent's primary office. Provide a narrative that gives a brief description of the Respondent, including the names and titles of principals, the main office's address, phone number, fax number, website and email address, when the company was organized, the principal office from which services will be offered, alternative company names and affiliations, and principal areas of practice.

Provide a brief history of the Respondent's business including size, area of expertise, number of years engaged in business under the company's present name, relevant license number(s) and/or certifications and other relevant information.

The Respondent must provide a concise description of its managerial capacity and financial viability to deliver the proposed Stairwell Replacement Services.

This page should also include the name and contact information (address, phone and fax numbers, and email address) of the Respondent and the proposed staff member(s) for this assignment, branch office location(s) and contact information.

#### B. Capability

Provide a narrative of the Respondent's approach to the project including where opportunities for creativity might be employed.

Describe the Respondent's ability to clearly and methodically present the scope of work for construction, the ability to successfully complete the design, engineering, and permitting in a professional, thorough, and timely fashion, and the ability to effectively engage all resources as contractor to provide the Stairwell Replacement Services.

#### C. Experience

1. An overview of the Respondent's expertise and experience performing stairwell replacement/repair for Type I and/or Type I/Type III multifamily property(ies);

- 2. An overview of the Respondent's green building expertise;
- 3. An overview of the Respondent's experience with affordable multifamily housing and the design, building and contract requirements of public sources of affordable housing financing, including the CA Tax Credit Allocation Committee ("TCAC"), CA Debt Limit Allocation Committee, and the US Department of Housing and Urban Development ("HUD");
- 4. Resumes of Respondent's key personnel who will be assigned to this project and a description of his/her relevant experience with comparable projects;
- 5. Descriptions and photograph(s) of comparable projects completed by the Respondent within the past ten (10) years that are submitted as evidence of relevant experience. In addition to project photograph(s), please include the following for each project:
  - Number of units
  - Original building construction type
  - A general description of the scope of work
  - Dates (month and year) of construction commencement and construction completion
  - The public sources of financing
  - Client's name and email and telephone contact information

#### D. Proposed design schedule

Please provide a proposed schedule for the Stairwell Replacement Services.

#### E. Proposed Cost

Respondent must state the proposed costs for permit/ inspection cost and the Stairwell Replacement Services described in this RFP, on the form attached hereto as Exhibit D.

#### F. Required Forms

See next Section 3.2, Required Forms/Certifications.

#### 3.2 Required Forms/Certifications

The following forms must be submitted with your Proposal in the following order:

**A. Proposed Cost Form (Exhibit D)**The form must be completed and signed.

#### B. Profile and Certification Form/Statement of Qualifications

The form Profile and Certification Form/Statement of Qualifications Form, attached hereto as Exhibit E must be completed and signed.

#### C. Section 3 Requirements and Action Plan

HACM expects the Respondent to make a good effort to comply with its Section 3 policy. Refer to "Section 3 Requirements and Action Plan" attached hereto as Exhibit F. Respondent must describe proposed compliance with Section 3 of the Housing Act of 1968, as amended regarding the provision of training and employment opportunities for low-income persons, with priority to residents of HACM, and a Certified Statement that the Respondent will make a good effort to comply with the Section 3 Policy. HACM Project Manager and Procurement Staff will monitor Respondent's compliance with Section 3 Requirements.

#### **D.** Addendum Acknowledgement (if applicable).

#### **E.** Other Required Documents/Information

If applicable, please identify any subcontractors that will be used for this job. Please Note: All major subcontractors (10% or more) must also submit the preceding required information (refer to Section 5.3 (3)). Respondent shall show evidence that they are a licensed contractor able to do business in the State of California.

#### F. HUD Forms

Please complete and attach Form HUD-5369-A, Representations, Certifications, and Other Statements of Bidders, Public and Indian Housing Programs, attached hereto as <u>Exhibit G</u>.

#### 4. PROCESS FOR SELECTING RESPONDENT

#### 4.1 RFP Timeline

#### 4.2 The following are proposed dates relating to this RFP:

August 1, 2024	RFP Issued
August 13, 2024	Mandatory Pre-Proposal Conference scheduled at 11:00 AM
August 15, 2024	Questions in writing via email, due by 10:00 AM
September 3, 2024	Proposals due by 3:00 PM

#### 4.3 <u>Pre-Proposal Conference</u>

A non-mandatory pre-proposal conference walk through will be held on-site. The meeting will be held at the Nancy Dodd Community Center at 3043 MacArthur Dr on **August 15**, at 11:00 AM PST.

#### 4.4 Questions/Answers

Address questions to Delayna Cambunga at dcambunga@hamonterey.org. All questions must be submitted <u>in writing or by email</u>. All questions will be answered in writing in an addendum issued and posted on HACM's website, in a form similar to the addendum attached hereto as <u>Exhibit H</u>. Each Respondent shall be responsible for executing the addendum. No questions will be responded to after the question-and-answer period has expired.

**Please Note:** HACM will, during the question-and-answer period (requests must be submitted before the question deadline) consider any contract clauses that the Respondent wishes to include therein and submit in writing a request for HACM to do so. If the proposed clauses are not accepted by HACM, then the Respondent must execute the contract in a form substantially similar to the one provided by HACM attached hereto as <u>Exhibit I</u>, and by submitting its Proposal the successful Respondent agrees to do so.

### 4.5 **Proposal Due Date**

Submissions to the RFP must be submitted by email to dcambunga@hamonterey.org or hand delivered to the Procurement department at HACM no later than **September 3, 2024 by 3:00 PM PST**.

Late Proposals will not be considered.

#### 4.6 <u>Selection Process</u>

All responses will be reviewed for completeness and responsiveness. Proposals will be reviewed, and the most qualified Respondent(s) may be required to be interviewed by an evaluation committee that will complete a final evaluation (the "Committee"). The selection will be the sole responsibility of HACM. HACM reserves the right to reject any and all Proposals and shall select a service provider based on the most advantageous conditions for HACM. If multiple contracts are awarded, projects will be assigned based on bid cost and vendor availability for the project

#### A. Initial Evaluation for Responsiveness

Each Proposal received will first be evaluated for responsiveness (e.g., meets the minimum of the published requirements). HACM reserves the right to reject any Proposals deemed by HACM not minimally responsive

and to waive any minor informalities it deems so (HACM will notify such Respondents in writing of any such rejection).

#### **B.** Evaluation Committee

The Committee will review the Proposals in accordance with this RFP. The Committee will recommend to HACM's Board of Commissioners (the "Board") a short list of Respondents. No Respondent shall be informed at any time during or after the RFP process as to the identity of any Committee member. If, by chance, a Respondent does become aware of the identity of such person(s), he/she <u>SHALL NOT</u> make any attempt to contact or discuss with such person anything related to this RFP. As indicated in this document, the Procurement Staff are the only people at HACM that the Respondent(s) shall contact pertaining to this RFP. Failure to abide by this requirement may (and most likely will) cause such Respondent(s) to be eliminated from consideration for award.

#### C. Evaluation

The Committee shall evaluate the responsive Proposals submitted and award points pertaining to the Evaluation Criteria.

#### D. <u>Potential "Competitive Range" and "Best and Finals" Negotiations</u>

HACM reserves the right to conduct "Best and Finals" Negotiations, which may include oral interviews with all Respondents deemed to be in the competitive range. Any Respondent deemed not to be in the competitive range shall be notified of such, in writing, by the HACM in as timely a manner as possible.

#### 1. Determination of Top Ranked Respondent

Typically, all points are awarded by the Committee. The Committee's scores (points) will determine the final ranking. The final ranking is then typically forwarded by the Committee to the Executive Director for approval. If the evaluation was performed to the satisfaction of the Executive Director, the final ranking may be forwarded to the Board at a scheduled meeting for approval. Contract negotiations may, at the HACM's option, be conducted prior to HACM approval.

#### 2. Restrictions

All persons having familial (including in-laws) and/or employment relationships (past or current) with principals and/or employees of a Respondent will be excluded from participation on the Committee. Similarly, all persons having ownership interest in and/or contract

with a Respondent will be excluded from participation on the Committee.

#### 4.7 <u>Evaluation Criteria</u>.

No.	Criteria	Points
1.	<u>Capability (25 points)</u> : Only qualified Respondents with relevant expertise and comparable experience will be considered. At a minimum, a Respondent must be licensed to perform the scope of work in Monterey County and the State of California, and the Respondent must be able to maintain the minimum required insurance coverage described in <u>Exhibit J</u> .	
2.	Experience (25 points): Extent and quality of Respondent's comparable project experience, experience with affordable housing construction and to work with public agencies.	25
3.	Construction Team Experience (20 points): Extent and quality of estimators and contractors to provide relevant cost data to inform the project.	20
4.	<u>Proposed Cost (25 points)</u> : Proposed compensation structure including hourly rates, administrative fees, chargeable expenses and services, method and frequency of billing which are reasonable according to industry standards and acceptable to HACM.	25
5.	MBE/WBE/Section 3 (5 points): Respondent is a minority-owned or women-owned business, a socially and economically disadvantaged business enterprise, a small business or Respondent qualifies for a Section 3 Business Preference.	5
	Total	100

#### 5. <u>CONTRACT REQUIREMENTS</u>

#### 5.1 Respondent Requirements

The Respondent(s) selected must be fully qualified to perform the Stairwell Replacement Services and must possess the appropriate licensing. In addition, the work is funded by the California Department of Health Care Services issued award to the behavioral health bridge program. Any required documents generated by the Respondent and/or HACM must comply with all applicable HUD regulations specified in HUD-5370-C General Conditions of the contract for non-construction. The Respondent must also comply with all HACM contract requirements.

Prior to award, the *successful Respondent(s)* will be required to provide the proper license documents and insurance certificates, as described in Exhibit J.

All work performed pursuant to this RFP must conform and comply with all applicable local, state and federal codes, statutes, laws and regulations.

#### 5.2 Contract Award

A. Negotiations Once Proposals have been evaluated and ranked, HACM may use the contract negotiation process to obtain the most highly qualified Respondent(s) at a fair and mutually agreed-to price. The proposed Contract will include tasks with a Scope of Services and a Fee-Schedule.HACM reserves the right to enter into discussions with the Respondent(s) whose Proposal is deemed most advantageous and in HACM's best interest for the purpose of negotiations. HACM reserves the right to enter into negotiations with the responsible and responsive Respondent(s) within the competitive range without the need to repeat the formal RFP process.

HACM reserves the right to award without discussions.

**Meetings** Once the Contract is awarded, the Respondent(s) will meet with the Project Manager for this RFP and key staff to discuss the needs, method, and timeline of this requirement/service. **Contract Award Procedure** If a Contract is awarded pursuant to this RFP, the following detailed procedures will be followed: By completing, executing and submitting a Proposal, the Respondent is thereby agreeing to abide by all terms and conditions pertaining to this RFP as issued by HACM, including the contract clauses attached in the Sample Contractor Agreement attached hereto as **Exhibit I**.

#### 5.3 Contract Conditions

The following provisions are considered mandatory conditions of any Contract Award made by HACM pursuant to this RFP:

1. Contract Form: HACM will not execute a Contract on the successful Respondent's Form. Contracts will only be executed on HACM's form, which will be substantially similar to the form attached hereto as Exhibit I, and by submitting a Proposal the successful Respondent agrees to do so (please note that HACM reserves the right to amend this form as HACM deems necessary). However, HACM will, during the question-and-answer period (requests must be submitted before the question deadline) consider any contract clauses that the Respondent wishes to include therein and submits in writing a request for HACM to do so. IF THE PROPOSED CLAUSES ARE NOT ACCEPTED BY HACM, THE RESPONDENT MUST EXECUTE CONTRACT FORM AS PROVIDED. Failure of HACM to include such clauses does not give the successful Respondent the right to refuse to execute HACM's contract corm. It is the responsibility of each prospective Respondent to notify HACM, in writing, before the question deadline, of any contract clause that he/she is not willing to include and abide by in the final executed Contract. HACM will consider and respond to such written correspondence in the Addendum, and if the prospective Respondent is not willing to abide by HACM's response (decision), then that prospective Respondent shall be deemed ineligible to submit a Proposal.

Please note: HACM has no legal right or ability to (and will not) at any time, negotiate any clauses contained within ANY of the HUD Forms included as a part of this RFP.

- 2. **Assignment of Personnel:** HACM shall retain the right to demand and receive a change in personnel assigned to the work if HACM believes that such change is in the best interest of HACM and the completion of the contracted work.
- 3. **Unauthorized Sub-Contracting Prohibited:** The Respondent shall identify hereunder whether or not he/she intends to use any subcontractors for this job, if awarded, and/or if the Proposal is a joint venture with another Respondent. The successful Respondent shall not assign any right, nor delegate any duty for the work proposed pursuant to this RFP (including, but not limited to, selling or transferring the Contract) without the prior written consent of HACM. Any purported assignment of interest or delegation of duty without the prior written consent of HACM shall be void and may result in the cancellation of the Contract with HACM, or may result in the full or partial forfeiture of funds paid to the successful Respondent as a result of the proposed Contract; either as determined by HACM.

#### 5.4 <u>Contract Terms</u>

HACM intends to enter into a term agreement with the selected Respondent in a form substantially similar to the form contract attached hereto as Exhibit I.

#### **EXHIBIT A**

#### SCOPE OF WORK BY PROJECT MANAGER RICARDO CALDERON

- 1. Replace fascia/trim/railing/baluster.
- 2. Primer on all sides of lumber and paint to match the finish.
- 3. Reseal deck/color to match the finish.
- 4. Replace any dry rotted/termite damaged post/beams/header.
- 5. Install vapor barrier where required.
- 6. Replace damaged stringers, stubby post, wall rails, treads and riser.
- 7. Replace any and all mechanical fasteners.
- 8. All debris to remove in a lawful manner by Respondent.

## **EXHIBIT B**

## LOCATION MAP AND AERIAL PHOTOS FOR PDM

## **EXHIBIT C**

## CAPITAL NEEDS ASSESSMENT

## **EXHIBIT D**

## PROPOSED COST FORM

## **EXHIBIT E**

## PROFILE AND CERTIFICATION/QUALIFICATIONS FORM

## **EXHIBIT F**

## SECTION 3 REQUIREMENTS AND ACTION PLAN

#### **EXHIBIT G**

# FORM HUD-5369-A, REPRESENTATIONS, CERTIFICATIONS, AND OTHER STATEMENTS OF BIDDERS, PUBLIC AND INDIAN HOUSING PROGRAMS

## **EXHIBIT H**

## SAMPLE ADDENDUM

## **EXHIBIT I**

## SAMPLE CONTRACT AGREEMENT

## **EXHIBIT J**

## INSURANCE REQUIREMENTS

## **EXHIBIT K**

## PREVAILING WAGE/DAVIS BACON DETERMINATION