

**2019-4007**  
**Architectural Services for 9% LIHTC**  
**PROFESSIONAL PERFORMANCE AND PROJECT ASSESSMENT**

The following Evaluation factors will be scored utilizing both objective and subjective scoring criteria. Each category is identified as subjective, objective or a combination of both. Please refer to the RFP, Section 4.3 for more detailed evaluation criteria.

**Objective Scoring Criteria**

- 5 Points = Total Applicability
- 4 Points = Substantial Applicability
- 3 Points = Average Applicability
- 2 Points = Limited Applicability
- 1 Point = Minimum Responsiveness
- 0 = Non-Responsive

**Subjective Scoring Criteria**

- 5 Points = Excellent
- 4 Points = Above Average
- 3 Points = Average
- 2 Points = Below Average
- 1 Point = Poor
- 0 = Non-Responsive

Evaluation Factor		Points	Weighted Average	Proposer's Response
<b>I. ABILITY TO PERFORM THE WORK (Tab 4A)</b>		<b>0-5</b>	<b>20%</b>	<b>Response - This Category will consist of both objective and subjective factors.</b>
1	Firm Name:			
2	Name of Principals:			
3	Proposers will <u>not</u> be scored in this category as it will only be used to determine the areas of expertise in which your firm can provide services to CMHA and upon which you wish to be evaluated. Please identify whether disciplines are offered in-house or by sub-consultants. If you intend to utilize a sub-consultant, please include their name in the column for Proposer's Response.			
	• Architecture	In-house	Sub	
	• Interior Design	In-house	Sub	
	• Civil Engineering	In-house	Sub	
	• Electrical Engineering	In-house	Sub	
	• Geotechnical Engineering	In-house	Sub	
	• Landscape Architecture	In-house	Sub	
	• Mechanical Engineering	In-house	Sub	
	• Site Planning	In-house	Sub	
	• Structural Engineering	In-house	Sub	
	• Other:	In-house	Sub	
4	Proposers will not be scored in this category as it will only be used to determine the areas of funding expertise in which your firm can provide services to CMHA and upon which you wish to be evaluated. Please identify which areas you have experience:			
	• LIHTC	Yes	No	
	• Homes	Yes	No	
	• Capital Funding	Yes	No	
	• Other miscellaneous funding (e.g, gap, FHA)	Yes	No	
5	Discuss your firm's professional history. Include the number of years in business and the number of years involved in affordable residential housing.			

6	Comment on the firm's specialized expertise:		<b>Subjective</b>	
7	Provide audited financial statements. If you do not have audited financial statements, provide year-end financial statements. Include most current and prior two years.			Proposer to provide financial statements for the last three years in Tab 4A1
8	Provide the firm's history of claims, litigation, arbitration and alternative dispute resolutions for the past three years and whether still pending, or if concluded, how these claims were resolved. Include both claims asserted against you and that you asserted.			Proposer to provide firm's history of claims and litigation in Tab 4A2
9	Provide staffing information (number of architects, interior designers, engineers, etc.)			
10	In the case of a multiple office firm, provide general information on the firm (locations, staffing, etc.) but also provide detailed information on the office that will be servicing CMHA.			
<b>Sub Total Category I. Ability to Perform the Work</b>				Total average of evaluation score using 20% weighted average for this category

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Evaluation Factor		Points	Weighted Average	Proposer's Response
<b>II. Firm's Management Style and Philosophy (Tab 4B)</b>		<b>0-5</b>	<b>25%</b>	<b>Response</b>
		<b>Subjective Factors</b> (This Category is purely subjective and left to the interpretation of the evaluation committee based upon the information provided by the Proposer to this RFP)		
1	Describe the firm's culture, vision and design philosophy and how that affects the way you work with the client. Describe how you handle the design process and how you handle project management from initial design through warranty sign-off.			
2	Describe the firm's quality control program, both internally and with external subcontractors and contractors; include discussion of document coordination			
3	Describe the processes and procedures for meeting customer standards, schedules, and budgets. Include examples of design developments completed on an accelerated or stringent timeline.			

4	What is your definition of errors and omissions (When is the architect responsible and when is the owner expected to pay for the charges)? Provide an example.			
5	Do you have experience holding contractors responsible for warranty issues? How do you hold them accountable?			
6	Discuss coordination of specifications so there is consistency throughout the entire set of project documents. Also discuss coordination of specifications with drawings.			
7	Describe the firm's approach to developing renovation designs and cost estimates for older facilities where record drawings are not available.			

8	Describe the firm's approach to project scheduling and cost estimating.			
9	Have you ever done projects under the funding rules of LIHTC with additional funding sources? Have you met all the deadlines and budgets? Describe.			
	<i>Not utilized</i>			
10	What expertise and experience does your firm possess and offer that sets you apart from other Architectural firms?			

11	Describe your firm's overall comprehension of the Authority's design needs and expectations utilizing your firm's current best practices.			
<b>Sub Total Category II. Firm's Management Style and Philosophy</b>				Total average of evaluation score using 25% weighted average for this category

**2019-4007**  
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Evaluation Factor		Points	Weighted Average	Proposer's Response
<b>III. Project Team (Tab 4C)</b>		<b>0-5</b>	<b>15%</b>	<b>Response</b>
<b>Subjective Factors</b> (This Category is purely subjective and left to the interpretation of the evaluation committee based upon the information provided by the Proposer to this RFP)				
1	Provide team organization chart, including back-up personnel. Identify key members of the firm who will be assigned to CMHA. Include consultants.		<b>Subjective</b>	Proposer to provide organizational chart under Tab 4C1
2	List proposed consultants to be used for projects with CMHA; include a description of each consultant's expected contribution.			Proposer to provide resumes in Tab 4C2
3	Provide resumes of all listed principles, staff and consultants designated to provide services for CMHA projects. Include work experience, education, affiliations and awards. Include the firm's construction administration/observation personnel.			Proposer to provide resumes in Tab 4C3
4	Will construction administration be performed with staff that will be involved in the design and production of the contract documents?			
5	Describe the involvement of a firm's principal in potential projects and their extent of involvement. Include their role and activity at the various stages of document preparation and construction administration.			
6	Do you see any potential conflicts of interest if awarded a contract? If yes, please elaborate.			
<b>Sub Total of Category III. Project Team</b>				Total average of evaluation score using 15% weighted average for this category

**2016-4101  
General Architectural Services  
PROFESSIONAL PERFORMANCE AND PROJECT ASSESSMENT**

Evaluation Factor		Points	Weighted Average	Proposer's Response
<b>IV. PAST PERFORMANCE: Project References</b>		<b>0-5</b>	<b>25%</b>	<b>Response</b>
Proposers should provide three projects completed in the last five years and a maximum of five projects. <b>This page should be completed for each project</b> and placed within a separate subtab for each project (e.g., 4D1, 4D2, 4D3). Do not include design-build projects.		This Category will consist of both Objective and Subjective Factors. Proposers will only be evaluated and scored on the projects identified by the proposer.		
1	Example Project Number (1-3):			
2	Title and Location (City and State)			
3	Owners representative having knowledge of the firm's work, include the contact name, phone, email, and address.		<b>Objective</b>	
4	Description of the project and your firm's involvement in the project:			
5	List the key team members involved, including sub-consultants and their role:			
6	Provide samples drawings, renderings, floor plans, elevations, to be reviewed and considered by the evaluation committee			Proposer to provide sample drawings, renderings, floor plans and elevations under the subtab for this project
7	What was the owner's budget?		<b>Subjective</b>	
8	What was <b>your firm's</b> pre-construction estimate?			
9	What was the bid amount? Was the project bid more than once? Explain.			
10	Provide a table listing the change orders for this project including the change order number, reason (e.g. owner change, error), and change in cost.			Proposer to provide table under the subtab for this project
11	What was the final cost?			

12	What were your fees for design and project management?			
13	What certifications were goals when you designed the project and were those certifications achieved? (eg LEED)			
14	Was value engineering used on this project to keep the project within budget, and if so, what methodology was used? What were the results?			
15	Was there any litigation or arbitration regarding this project? If so, please describe the parties, the dispute, and the resolution (or if the matter is pending).			
16	Provide the design services schedule used on this project under the subtab for this project. Discuss changes to the schedule and the reasons.			Proposer to provide schedule and discussion under the subtab for this project
<b>Sub total of category IV. Past Performance: Project References for this Project</b>				Total average of evaluation score using 25% weighted average for this category.

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<b>IV. PAST PERFORMANCE: Project References</b>		<b>0-5</b>	<b>25%</b>	<b>Response</b>
Proposers should provide a minimum of three projects completed in the last five years . <b>This page should be completed for each project</b> and placed within a separate subtab for each project (e.g., 4D1, 4D2, 4D3). Do not include design-build projects.		This Category will consist of both Objective and Subjective Factors. Proposers will only be evaluated and scored on the projects identified by the proposer.		
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<b>Sub total of category IV. Past Performance: Project References for this Project</b>				Total average of evaluation score using 25% weighted average for this category.

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16	Provide the design services schedule used on this project under the subtab for this project. Discuss changes to the schedule and the reasons.			Proposer to provide schedule and discussion under the subtab for this project
<b>Sub total of category IV. Past Performance: Project References for this Project</b>				Total average of evaluation score using 25% weighted average for this category.