

**2020-4001**  
**General Architectural Services**  
**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.

**Submit this form as a separate electronic file as part of your proposal so that the evaluators can use it for scoring.**

**Subjective Scoring Criteria**

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

**Your response should not exceed what is visible in the response box.**

| 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  | This category will 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 and you were the <b>primary</b> architect:  |            |                  |  |
|  | • 4% LIHTC  | Yes        | No               |  |
|  | • 9% LIHTC  | Yes        | No               |  |
|  | • HOME/CDBG   | Yes        | No               |  |
|  | • Capital Funding   | Yes        | No               |  |
|  | • FHA   | Yes        | No               |  |
|  | • Other miscellaneous funding (e.g. gap)  | Yes        | No               |  |
|  | Score for this section  |            |                  |  |
| 5  | 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                 |

|  |   |  |            |                                   |
|--|---|--|------------|-----------------------------------|
| 6  | Discuss your firm's professional history. Include the number of years in business and the number of years involved in affordable residential housing.                                       |  |            |                                   |
| 7  | Comment on the firm's specialized expertise:  |  | Subjective |                                   |
| 8  | Provide staffing information (number of architects, interior designers, engineers, etc.)  |  |            |                                   |
| 9  | 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 |

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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 quality control program, both internally and with external subcontractors and contractors; include discussion of document coordination. Do you require review by a principal not associated with the project?                       |            |                  |                     |
| 2   | For projects in which you were the <b>principal</b> architect, describe the processes and procedures for meeting customer standards, schedules, and budgets. Include examples of design developments completed on an accelerated or stringent timeline. |            |                  |                     |
| 3   | What is your policy on errors and omissions (When is the architect responsible and when is the owner responsible)? Provide an example.  |            |                  |                     |

|   |   |  |  |  |
|---|---|--|--|--|
| 4 | Who does the cost estimates when you are the principal architect and how accurate have they been on projects over five million dollars? What program do they use? |  |  |  |
| 5 | Describe the firm's approach to cost estimating.  |  |  |  |
| 6 | Describe the firm's approach to project scheduling.   |  |  |  |
| 7 | Have you ever done projects under the funding rules of LIHTC with additional funding sources? Have you met all the deadlines and budgets? Describe.               |  |  |  |

|   |   |  |  |  |
|---|---|--|--|--|
| 8   | <p>Have you ever done projects under the funding rules of HOME/CDBG or FHA with additional funding sources? Have you met all the deadlines and budgets? Describe.</p>                           |  |  |  |
| 9   | <p>Outline the experience you have with the following programs: Enterprise/Green Communities, LEED Certification, EPA/Energy Star Home rating, Net Zero, National Green Building Standards.</p> |  |  |  |
| 10  | <p>What expertise and experience does your firm possess and offer that sets you apart from other Architectural firms?</p>   |  |  |  |
| 11  | <p>What is your philosophy/practice on construction administration?</p>   |  |  |  |
| <p><b>Sub Total Category II. Firm's Management Style and Philosophy</b></p> |   |  |  | <p>Total average of evaluation score</p> |

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| Evaluation Factor                 |  | Points  | Weighted Average | Proposer's Response                                    |
|-----------------------------------|--|---|------------------|--|
| <b>III. Project Team (Tab 4C)</b> |  | <b>0-5</b>  | <b>20%</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.  |   |                  | 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 and do they have authority to make decisions?  |   |                  |  |
| 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.                                 |   |                  |  |
|                                   |  |   | Subjective       |  |

|  |   |  |  |  |
|--|---|--|--|--|
| 6  | As the primary firm, how many 9% LIHTC projects have you submitted? Of those how many were awarded? |  |  |  |
| 7  | 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 |

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| Evaluation Factor  |  | Points   | Weighted Average | Proposer's Response  |
|--|--|--|------------------|--|
| <b>IV. PAST PERFORMANCE: Project References</b>  |  | <b>0-5</b>   | <b>15%</b>       | <b>Response</b>  |
| <p>Proposers should provide 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.</p> |  | <p>This Category will consist of both Objective and Subjective Factors. Proposers will only be evaluated and scored on the projects identified by the proposer.</p> <p>The proposer <b>MUST</b> be the lead architect and <b>must</b> answer all questions.</p> <p>LIHTC projects are preferred.</p> |                  |  |
| 1  | Example Project Number (1-5): 1  |  |                  |  |
| 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.          |  | Objective        |  |
| 4  | Description of the project including funding, budget, size, and design duration:   |  |                  |  |
| 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 |  | Subjective       | <p>Proposer to provide an elevation and minimum of one floor plan for new construction. If renovation, provide before and after plans of the elevation, floor plan and demo plan (floor and demo plan shall be of the same floor). For the above, provide initial and final construction drawings.</p> |

|   |  |  |  |   |
|---|--|--|--|---|
| 7   | What was the owner's budget?   |  |  |   |
| 8   | What was <i>your firm's</i> 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 (dollar amount and percentage of construction budget)?  |  |  |   |
| 13  | Provide fees for construction administration management. If construction management was not included, put "NA".  |  |  |   |
| 14  | 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). |  |  |   |
| Sub total of category IV. Past Performance: Project References for this Project |  |  |  | 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>15%</b>       | <b>Response</b>  |
| <p>Proposers should provide 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.</p> |  | <p>This Category will consist of both Objective and Subjective Factors. Proposers will only be evaluated and scored on the projects identified by the proposer.</p> <p>The proposer <b>MUST</b> be the lead architect and <b>must</b> answer all questions.</p> <p>LIHTC projects are preferred.</p> |                  |  |
| 1  | Example Project Number (1-5): 2  |  |                  |  |
| 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.          |  | Objective        |  |
| 4  | Description of the project including funding, budget, size, and design duration:   |  |                  |  |
| 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 |  | Subjective       | <p>Proposer to provide an elevation and minimum of one floor plan for new construction. If renovation, provide before and after plans of the elevation, floor plan and demo plan (floor and demo plan shall be of the same floor). For the above, provide initial and final construction drawings.</p> |

|   |  |  |  |   |
|---|--|--|--|---|
| 7   | What was the owner's budget?   |  |  |   |
| 8   | What was <i>your firm's</i> 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 (dollar amount and percentage of construction budget)?  |  |  |   |
| 13  | Provide fees for construction administration management. If construction management was not included, put "NA".  |  |  |   |
| 14  | 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). |  |  |   |
| Sub total of category IV. Past Performance: Project References for this Project |  |  |  | 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>15%</b>       | <b>Response</b>  |
| <p>Proposers should provide 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.</p> |  | <p>This Category will consist of both Objective and Subjective Factors. Proposers will only be evaluated and scored on the projects identified by the proposer.</p> <p>The proposer <b>MUST</b> be the lead architect and <b>must</b> answer all questions.</p> <p>LIHTC projects are preferred.</p> |                  |  |
| 1  | Example Project Number (1-5): 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.          |  | Objective        |  |
| 4  | Description of the project including funding, budget, size, and design duration:   |  |                  |  |
| 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 |  | Subjective       | <p>Proposer to provide an elevation and minimum of one floor plan for new construction. If renovation, provide before and after plans of the elevation, floor plan and demo plan (floor and demo plan shall be of the same floor). For the above, provide initial and final construction drawings.</p> |

|   |  |  |  |   |
|---|--|--|--|---|
| 7   | What was the owner's budget?   |  |  |   |
| 8   | What was <i>your firm's</i> 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 (dollar amount and percentage of construction budget)?  |  |  |   |
| 13  | Provide fees for construction administration management. If construction management was not included, put "NA".  |  |  |   |
| 14  | 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). |  |  |   |
| Sub total of category IV. Past Performance: Project References for this Project |  |  |  | Total average of evaluation score using 25% weighted average for this category. |

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**Objective Yes/No Scoring Criteria**

1 Points = Yes  
0 = No

| Evaluation Factor  |  | Points                  | Weighted Average | Proposer's Response   |
|--|--|-------------------------|------------------|---|
| <b>V. GOLD PERFORMANCE STANDARDS</b>                       |  | <b>1 point for each</b> | <b>5%</b>        | <b>No Response Required from Proposer.</b>                                    |
|  | Overall presentation - The firms proposal as a direct reflection of the type of product the Authority may expect from the proposer exhibiting quality, creativity and professionalism.<br><b>Either one or zero points may be awarded for each of the five categories below:</b> |                         | <b>Objective</b> |   |
| 1  | Legible and readable   |                         |                  |   |
| 2  | No spelling or grammar errors  |                         |                  |   |
| 3  | All required information is provided.  |                         |                  |   |
| 4  | Information is in correct sequence   |                         |                  |   |
| 5  | Overall presentation   |                         |                  |   |
| <b>Sub Total of Category V. Gold Performance Standards</b> |  |                         |                  | Total average of evaluation score using 5% weighted average for this category |