



**homeforward**

**Request for Qualifications**  
Architectural Services

RFQ No. 03/19-394

Issue Date 03/27/2019  
Qualifications Due 04/12/2019 11:00AM

**REQUEST FOR QUALIFICATIONS  
RFQ NO. 03/19-394  
ARCHITECTURAL SERVICES**

To: Prospective Architectural Firms  
Subject: Request for Qualifications for Architectural Design Services for Prospective Projects  
Issue Date: 03/27/2019  
Due Date: 04/12/2019, 11:00 AM

***No emailed or faxed qualifications will be accepted***

RFQ Contact: Berit Stevenson  
Procurement and Contracts Manager  
Home Forward  
135 SW Ash Street, 5<sup>th</sup> Floor  
Portland, OR 97204  
503-802-8541  
berit.stevenson@homeforward.org

Document Availability: Electronic copies of the RFQ and a registration form may be obtained from the Home Forward website: [www.homeforward.org](http://www.homeforward.org). To be added to the Prospective Proposers List and receive addenda, email a registration form to [berit.stevenson@homeforward.org](mailto:berit.stevenson@homeforward.org).

## **TABLE OF CONTENTS**

### **I. INTRODUCTION**

- A. Notice
- B. Solicitation Overview
- C. Roles & Responsibilities
- D. RFQ Schedule

### **II. SCOPE OF SERVICES**

- A. Statement of Work

### **III. SUBMISSION REQUIREMENTS**

- A. Content Specifications
- B. Format Specifications

### **IV. QUALIFICATIONS EVALUATION & AWARD**

- A. Evaluation Process
- B. Written Qualifications Evaluation Criteria
- C. Interviews of Responders in Competitive Range, Scoring Revisions

### **V. STATEMENTS & REQUIRED INFORMATION**

- A. Clarifications, Addenda, Protests of RFQ Terms & Conditions
- B. Clarification of Statement of Qualifications
- C. Protests
- D. Cancellation or Rejection, Waiver of Irregularities
- E. Cost of Qualifications Preparation
- F. References
- G. Confidentiality
- H. Withdrawal of Responses
- I. Reservation of Rights Concerning RFQ

## I. INTRODUCTION

---

### A. Notice

#### **HOME FORWARD REQUEST FOR QUALIFICATIONS NO. 03/19-394 ARCHITECTURAL SERVICES**

Qualifications are requested from Architectural Firms (also referred herein to as Respondents) for the provision of architectural services related to the design and construction of housing. The purpose of this solicitation is to reopen the existing Short List and identify additional qualified Architectural Firms that would be invited to submit Proposals to Home Forward for potential housing projects. **Firms on the existing Short List shall remain on the Short List and should not respond to this solicitation.**

Home Forward will accept qualifications until **11:00AM April 12<sup>th</sup>, 2019** at Home Forward's Procurement and Contracts Department, located at 135 SW Ash Street, 5<sup>th</sup> Floor, Portland, OR 97204. Qualifications should be clearly marked with the Respondent's name, address, and the RFQ title and number.

Home Forward develops and renovates multi-family housing properties throughout Multnomah County. Home Forward's Development and Community Revitalization Department (DCR) frequently secures new work by responding to RFPs, RFQs, grant opportunities, and other competitive processes offered by public entities (collectively, funding opportunity). This solicitation represents the first step of a two-step procurement process. Through this solicitation (step one), Home Forward will establish a Short List of qualified Architectural firms that Home Forward can exclusively invite to submit proposals in response to specific funding opportunities as they are available. Based on the results of proposals submitted in response to a specific funding opportunity (step two), Home Forward will select an Architectural Firm to assist with the funding opportunity response. In the event the funding opportunity response is successful and a Project is initiated, Home Forward anticipates finalizing a contract for the full design and engineering services required by Project with the selected Architectural Firm.

Electronic copies of the RFQ, a registration form, and the existing Short List will be made available on the Home Forward website ([www.homeforward.org](http://www.homeforward.org)) on **March 27<sup>th</sup>, 2019**. To be added to the Prospective Proposers List and receive addenda, email a registration form to [berit.stevenson@homeforward.org](mailto:berit.stevenson@homeforward.org).

Home Forward has a goal of 20% participation by minority-owned, woman-owned, and emerging small businesses (MWESB). Interested MWESBs are encouraged to submit qualifications.

RFQ Contact: Berit Stevenson  
Procurement and Contracts Manager  
Home Forward  
135 SW Ash Street, 5<sup>th</sup> Floor  
Portland, OR 97204  
503-802-8541  
[berit.stevenson@homeforward.org](mailto:berit.stevenson@homeforward.org)

## B. Solicitation Overview

Home Forward develops new and renovates existing multi-family affordable housing properties throughout Multnomah County. Sites, funding, and other types of project support are frequently secured through RFPs, RFQs, grant opportunities, and other competitive processes offered by public entities. These funding opportunities are typically unanticipated and require responses in 6 to 8 weeks. Home Forward expects between 1 and 2 such funding opportunities to occur annually. While the size of potential projects will vary, Home Forward anticipates Project construction costs ranging between \$1,000,000 and \$40,000,000.

To submit a timely response to announced funding opportunities, Home Forward plans to utilize a two-step RFQ/RFP process. With this solicitation, Home Forward will reopen the existing Short List to identify additional qualified Architectural Firms that would be invited to submit proposals in response to the second-step of the RFQ/RFP process. Home Forward identified twelve firms for the Short List established in August 2017. Home Forward expects to periodically reopen the RFQ process and solicit qualifications from Architectural Firms who desire to be added to the Short List. **Firms on the existing Short List below shall remain on the Short List and should not respond to this solicitation.**

- Ankrom Moisan Architects
- Carleton Hart Architecture
- COLAB Architecture + Urban Design, LLC
- Hacker Architects
- Holst Architecture
- Lever Architecture
- LRS Architects
- Merryman Barnes Architects, Inc.
- MWA Architects, Inc.
- Scott | Edwards Architecture
- SERA Architects
- YBA Architects

Due to the time constraints imposed by notices of funding opportunities, Home Forward anticipates an expedited RFP process. The RFP will include specific information about the funding opportunity Project and all short-listed firms will be invited to respond. Sites, programs, construction type, financing structure, timeline, and other Project-specific items will vary. Based on submitted proposals, Home Forward plans to select an Architectural Firm to assist in the preparation of the funding opportunity response, utilizing a personal services contract, and if successful, enter into a contract (likely modified AIA B104 or B101) for the full design services for the Project. Home Forward anticipates a parallel two-step RFQ/RFP process to identify and select construction contractors.

Home Forward will identify and short list Architectural Firms that exhibit strong graphic, written, and oral communication skills, intellectual flexibility, demonstrable ability to assemble a diverse and highly-qualified team of design consultants, capacity to engage in likely projects, and a commitment to design excellence.

The work proposed in this RFQ is speculative in nature and short listed Architectural Firms are not guaranteed work.

## C. Roles & Responsibilities

### Home Forward

Home Forward provides housing solutions for individuals and families who cannot find affordable, safe, and appropriate housing. Home Forward has a special responsibility to those who encounter barriers to housing because of income, disability, or special need.

Home Forward is a municipal corporation authorized by the State of Oregon under the Oregon Revised Statutes §456.055 to §456.235. Home Forward was established on

December 11, 1941, by Resolution of the Council of the City of Portland. Home Forward's jurisdiction was expanded to include all of Multnomah County in 1992. A nine-member Board of Commissioners appointed by the Mayor of Portland, the Mayor of Gresham, and the Chairperson of the Multnomah County Commission and confirmed by the Portland City Council governs Home Forward. Members of the Board are volunteers and serve without pay.

For prospective projects, Home Forward is likely to act as developer or co-developer and is likely to lead the development team through pre-development, design, and construction. The team structure specific to each prospective project will be detailed in the RFP.

**Architectural Firm**

The Architectural Firm's responsibilities will vary. Work on any given project could be limited to supporting a response to a solicitation, or could extend to cover traditional and expanded design services. The Architectural Firm's Project Manager will act as the day-to-day contact for all work envisioned through this solicitation. For all projects, the Architectural Firm's contract will be with Home Forward or an entity formed to execute the development to which Home Forward is a party.

**Construction Contractor**

Home Forward anticipates utilizing the same two-step RFQ/RFP process to identify and select qualified Construction Manager/General Contractors (CM/GC) and currently has established a Short List of such. Home Forward may elect to utilize a Design-Build method and not proceed with issuing an RFP to the Short List of Architectural Firms. For all projects, the CM/GC's contract will be with Home Forward or an entity formed to execute the development to which Home Forward is a party. In some instances,

**D. RFQ Schedule**

This schedule is subject to change. Home Forward reserves the right to deviate from this schedule.

<b>RFQ Schedule</b>	
RFQ Issue Date	03/27/2019
Deadline for Written Requests for Information	04/03/2019
Last Addendum Issue Date (if needed)	04/05/2019
Qualifications Due	11:00AM, 04/12/2019
Committee Evaluation	04/12/2019 – 04/17/2019
Notice of Competitive Range	04/17/2019 – 04/19/2019
Interviews (if needed, Competitive Range Only)	Week of 04/22/2019
Notice of Short List	Week of 04/22/2019

**II. SCOPE OF SERVICES**

---

**A. Statement of Work**

The work proposed in this RFQ is speculative in nature, and Short Listed Architectural Firms are not guaranteed work.

Home Forward envisions that all projects undertaken pursuant to this solicitation will begin with a response to an RFP, RFQ, grant opportunity, or other competitive process offered by a public entity. The Architectural Firm selected as a result of the second-step of the RFQ/RFP process will be asked to assist Home Forward with any combination of the following tasks related to the funding opportunity response:

- Conceptual site analysis, master planning, urban design, site planning, and preliminary architectural design
- Program development (number and types of housing units)
- Attendance at pre-proposal conferences and public meetings
- Renderings necessary to demonstrate feasibility
- Other tasks as required

In the event a response is successful and a project initiated, the final scope of work, including the work of all required sub-consultants (the A&E Team), will be determined during negotiations with the Architectural Firm. Home Forward's development projects typically include the following tasks:

1. All items listed below, from conceptual design through one-year warranty:
  - Urban design
  - Architectural design
  - Land use services, including design review, for sites throughout Multnomah County
  - Civil design and engineering
  - Landscape design
  - Structural design and engineering
  - Mechanical, electrical, and plumbing design and engineering, including energy modeling and building commissioning
  - Low-voltage systems design and engineering, including data, access, and security
  - Interior design, including space planning and furniture selection
  - Envelope and constructability review services
  - Design and engineering of sustainable buildings that demonstrate superior energy efficiency, water efficiency, and resource efficiency
  - Management of sustainable building documentation and 3<sup>rd</sup> party certification processes (LEED, Architecture 2030, Living Building Challenge, etc.)
  - Signage design
2. Design work necessary to support other funding applications (e.g., Low-Income Housing Tax Credit applications)
3. Participate in public workshops, resident meetings, neighborhood meetings, and other public forums
4. Coordinate design work with public and franchise utilities
5. Coordinate design work with land surveyor, geotechnical engineer, environmental engineer, and other consultants under contract to Home Forward
6. Acquire all building permits and other jurisdictional approvals related to the development of the site and construction or renovation of the Project
7. Coordinate cost estimates, project schedule, and construction phasing with CM/GC
8. Support the CM/GC during the bidding process
9. Attend weekly team meetings, prepare and distribute meeting notes

### **III. SUBMISSION REQUIREMENTS**

---

#### **A. Content Specifications**

Respond only to the items listed below, and include only relevant information. Do not include lists (past projects, past clients, etc.) unless specifically requested to do so. The Selection Committee (the Committee) will not review materials that are not requested below.

To be considered responsive and responsible, adhere to the following requirements. Responses must be specific and complete unto themselves. Any submittal that, in the opinion of Home Forward, does not fully and completely address these requirements will not be reviewed.

Brevity is encouraged. The Committee will look favorably upon succinct and direct language.

1. Cover Letter (2 pages maximum)

Introduce the Architectural Firm and key staff, and describe the firm's interest in collaborating with Home Forward. An authorized representative of the firm shall sign the letter. If the Respondent is not a legal entity or is a joint-venture or general partnership, authorized representatives of all principal participants shall sign the letter. Provide contact information including email. Indicate receipt of any addenda received and reviewed.

2. Firm Information (8 pages maximum)

Provide the following:

- a. Business name & address
- b. Brief firm description, including organizational development (years in business), areas of expertise, number of current staff by position, and M/W/ESB certification if applicable.
- c. Given the speculative nature of the work, identify staff likely to be assigned to work as it arises, including responding to funding opportunities and, if successful, assigned to the continuing design work. Include likely Project Managers, lead designers and other positions that would be needed to accomplish the work. Provide a brief resume for each. Affordable housing experience is desirable. Staff selected for this work should possess some of the specific skills described in Section II.A.
- d. State whether the Firm is currently, or has been during the last five (5) years, involved in defending, negotiating, mediating, or litigating (in court, administrative proceedings, or arbitration) any claims or liens relating to or arising from design or business activities. Provide a brief description of the circumstances that led to the claim(s) and the resolution(s). Home Forward reserves the right to request more information on any and all claims disclosed.

3. Design Portfolio (2 pages per project maximum)

Describe the Firm's recent experience in design and construction of at least three (3) but no more than four (4) projects that are functionally and/or characteristically compatible with Home Forward's development portfolio. Respondents may elect to submit three (3) built projects and one (1) unbuilt project. The unbuilt project should be under construction or in the entitlement review process. Both new development and major renovations are suitable. Typical functional similarities are public ownership, development team structure, and financing structure. Typical characteristic similarities are contextual urban considerations, building size and scale, program, design quality, and construction quality.

For each project, provide the following information:

- a. Names of staff and roles on the project
- b. Photographs and/or renderings
- c. A brief narrative of notable urban design, architectural, and construction features.
- d. The architectural program. For multi-family housing developments, include the number of units, bedroom mix, total built square footage, and tenancy of residents (i.e., affordable housing, market rate housing).

- e. Development team members, including key sub-consultants. Describe the team structure. The intent of this RFQ is to develop a Short List of Architectural firms only; subconsultant teams will follow during either the proposal process or upon project initiation. There is no need to provide subconsultant qualifications as part of a response to this solicitation.
  - f. Total construction cost, total development cost, and total A&E Team fees.
  - g. References. For each project presented, provide current contact information for at least one (1) person familiar with the Firm's work and performance. References for each project included in the Design Portfolio must be provided and at least one (1) reference for each project shall be the Owner's primary representative.
4. Target Business Participation (1 page maximum)
- Home Forward has a goal of 20% participation by State of Oregon certified M/W/ESB firms and some potential funders may have higher goals. Participation is measured by contract value. Address the Firm's demonstrated ability to include Target Businesses in a meaningful way. Include participation details of past projects presented in the Design Portfolio. Partnerships and joint ventures may be proposed during either the RFQ or the RFP phase. Neither is required.
5. Professional Licenses (1 page maximum)
- Provide proof of State of Oregon professional licensure for the person who will stamp the documents. This person must be a partner or employee of the Architectural Firm considered the prime consultant.

## **B. Format Specifications**

Each statement of qualifications shall comply with the following specifications.

- 1. 8.5" x 11" format, either vertical or horizontal.
- 2. Font size no smaller than 10 points.
- 3. Pages numbered sequentially. The statement of qualifications shall not exceed 20 pages and only the first 20 pages will be evaluated. The page limit does not include a cover page or table of contents. *Do not include section dividers or other extraneous material.*
- 4. One (1) full color hard copy original of the Statement of Qualifications secured with a binder clip. *Do not bind the original.*
  - Supply a copy of the executed joint-venture, or other partnership agreement if applicable. *This is excluded from the maximum page limit.*
- 5. One (1) portable drive with a single Portable Document Format (PDF) file of the Statement of Qualifications.
- 6. The hard copy original and the portable drive shall be enclosed in a sealed envelope marked with the project title, RFQ number, and the business name and address of the Respondent.
- 7. Acknowledge receipt of all addenda within the Cover Letter. Qualifications that do not acknowledge receipt of all addenda may be rejected.

## **IV. QUALIFICATIONS EVALUATION & AWARD**

---

### **A. Evaluation Process**

For the RFQ step, a five-step evaluation process will be used:

- Step 1: Determine if Qualifications meet minimum requirements
- Step 2: Evaluate Qualifications

- Step 3: Determine those Qualifications that are in the Competitive Range
- Step 4: Interviews (if determined to be necessary) for Respondents in the Competitive Range and final scoring
- Step 5: Selection of Short Listed Architectural Firms

Qualifications that do not adhere to all terms and conditions of this RFQ or are otherwise non-responsive may, in the sole discretion of Home Forward, be determined to not meet the minimum requirements and may be rejected or given a low rating in the evaluation process.

A Selection Committee will be formed to evaluate the responsive qualifications and shall apply the evaluation criteria and scoring set forth in Part B of this section. The Committee will determine which and how many firm qualifications are in the Competitive Range. Home Forward will provide written notice to all Respondents identifying the Architectural Firms in the Competitive Range.

**B. Written Qualifications Evaluation Criteria**

<b>Evaluation Criteria</b>	<b>Points</b>
Architectural Firm <i>(including but not limited to capacity, relevant staff experience, references, M/W/ESB certification)</i>	40
Design Portfolio <i>(including but not limited to urban design &amp; architectural work, sustainable work, applicability to HF portfolio, experience with occupied renovation)</i>	40
Target Business Participation Past Performance	20

**C. Interviews of Respondents in Competitive Range, Scoring Revisions**

The Selection Committee shall determine if interviews are in the best interest of Home Forward. Respondents in the Competitive Range may be invited to participate in interviews. Upon conclusion of the interviews, the Committee will revise its scores based on the evaluation criteria in Part B of this section of those respondents interviewed. Interviews are not a separate evaluation criterion eligible for points, but the Committee may consider the interview when revising its scores.

During the final evaluation, the Committee may meet one or more times to discuss interviews, references, and qualifications and revise scores.

The Committee will rank the Respondents in the Competitive Range and recommend the most Qualified Candidates for the Short List based on the final scores. The Committee shall determine the number of Candidates for inclusion on the Short List. Home Forward’s Executive Director will consider the recommendations of the Committee and will make a final determination and establish the Short List of Architectural Firms.

**V. STATEMENTS & REQUIRED INFORMATION**

---

**A. Clarifications, Addenda, Protests of RFQ Terms & Conditions**

Respondents are cautioned not to make any assumptions as to the implied meaning or intent of any part of the RFQ. Respondents should request clarification or additional information concerning the RFQ, in writing, as soon as possible, but in no event will such requests be received by Home Forward later than **2:00 PM on 04/03/2019**. If, in Home Forward’s opinion, additional information or interpretation is necessary, such information will be supplied in the form of an addendum that will be e-mailed to all individuals, firms,

etc., that are on the prospective Respondents List. Such addenda shall have the same binding effect as though contained in the main body of the RFQ. Any corrections or clarifications made in any manner other than by written addendum addressed to all Respondents will not be binding on Home Forward and Respondents shall not rely thereon.

Any prospective Respondent who contends that the terms and conditions of this RFQ, or any aspect of the selection process (1) will encourage favoritism in the award of a Contract for Architectural Services; (2) will substantially diminish competition; (3) will violate any other statute, regulation (including but not limited to Home Forward's Public Contracting Rules), policy, or law of any kind; or (4) is ambiguous, insufficient, or unfair for any reason, must file a written protest to the RFQ, which must be received by Home Forward on or before **2:00 PM on 04/03/2019**. Failure to file a protest by this time will be deemed a waiver of any claim by a Respondent that the selection process violates any of the items (1) - (4) of the foregoing sentence.

**B. Clarification of Statement of Qualifications**

Home Forward reserves the right to seek clarification of the written Statement of Qualifications. Respondents will provide additional clarifying information in a timely manner.

**C. Protests**

Following scoring of Qualifications in the Competitive Range and determination the Short List, Home Forward will issue Notice of Competitive Range and Notice of Short List to each Respondent and each respondent in the Competitive Range respectively.

1. Competitive Range Protest and Short List Protest. An adversely-affected or aggrieved respondent may submit a written protest of Home Forward's decision regarding the Competitive Range and/or the Short List. The protest shall specify the grounds upon which the protest is based. To be adversely-affected or aggrieved, the Respondent must demonstrate that but for Home Forward's (a) error in failing to reject a non-responsive higher-ranked Statement of Qualifications, or (b) substantial violation of a provision in the RFQ or applicable procurement statute or administrative rule, or (c) error in evaluating and scoring the protesting party's qualifications, the protesting party would have been named to the Short List.
2. Latest Date to Protest. Protests must be received by Home Forward no later than three (4) calendar days from the date of the Home Forward's Notice Competitive Range or Notice of Short List,, unless indicated otherwise in the letter.
3. Protest Delivery. Protest shall be delivered in hard copy to the address below no later than 2:00 PM on the protest due date. Late protests shall not be considered. Any protests of this solicitation should be sent to:

Berit Stevenson  
Procurement & Contracts Manager  
Home Forward  
135 SW Ash Street, 5<sup>th</sup> Floor  
Portland, OR 97204

4. At the request of the protesting party, a hearing will be conducted before the Procurement & Contracts Manager or other person so delegated by Home Forward's Executive Director within seven calendar days after submission of the written protest. The Procurement & Contracts Manager or other person so delegated by Home Forward's Executive Director shall consider a written protest and issue a written decision on the protest. The Procurement & Contracts Manager may not consider a protest that is filed in an untimely manner or that fails to allege facts that would support a finding that the protestor is an aggrieved Respondent.

**D. Cancellation or Rejection, Waiver of Irregularities**

Home Forward reserves the right to cancel this solicitation or reject any or all Statements of Qualifications in whole or in part, and to disband the Short List at any time before execution of a Contract by both parties if cancellation or disbandment is deemed to be in Home Forward's best interest. In no event shall Home Forward have any liability for disbandment of Short List or rejection of Statement of Qualifications. Home Forward reserves the right to waive irregularities or deficiencies in Qualifications if Home Forward determines that such waiver is in the best interest of Home Forward.

**E. Cost of Qualifications Preparation**

Respondents to this RFQ do so solely at their own expense. Under no circumstances whatsoever will Home Forward be responsible for or reimburse any costs incurred in the preparation and presentation of Qualifications, or for any related expenses or consequential damages of any kind.

**F. References**

Home Forward reserves the right to investigate references including references in addition to those listed in the response to this RFQ. Investigation may include past performance of Architectural Firm with respect to its successful performance of similar projects, compliance with specifications and contractual obligations, completion, or delivery of a project on schedule or on budget, and its lawful payment of sub-consultants, employees, and workers. If demanded by Home Forward, supportive references must be furnished.

**G. Confidentiality**

**Submittals are public records.** All information submitted by Respondents shall be a public record and subject to disclosure pursuant to the Oregon Public Records Act, except such portions of the Qualifications for which Respondent requests exception from disclosure consistent with Oregon Law. The Statement of Qualifications should identify any confidential information that the Respondent contends is exempt from disclosure under ORS 192.501 or 192.502. Home Forward will endeavor in good faith to honor appropriate requests for exemption from disclosure, but Home Forward reserves exclusive discretion to determine whether information qualifies for a statutory exemption. Home Forward's obligation under this section shall survive selection of the Short List.

**H. Withdrawal of Submittal**

Any Statement of Qualifications may be withdrawn by delivering a written request to Home Forward at any time prior to the time set for opening Qualifications. The request shall be executed by a duly authorized representative of the withdrawing Architectural Firm.

**I. Reservation of Rights Concerning RFQ**

Home Forward retains exclusive discretion and reserves the right to determine:

1. Whether a Statement of Qualifications is complete and complies with the provisions of this RFQ.
2. Whether a Respondent should be allowed to submit supplemental information.
3. Whether irregularities or deficiencies in a Statement of Qualifications should be waived.
4. Whether to seek clarifications of Architectural Firms or request additional information necessary to permit Home Forward to evaluate, rank, and select the Short Listed Firms.
5. Whether the Evaluation Committee should reconvene at any time and collectively review the scoring, making changes as the evaluation committee deems appropriate.

- END -