NEW MEXICO MORTGAGE FINANCE AUTHORITY

Request for Qualifications

Architectural and Engineering Design Services and Administration of General Contractor



August 3, 2022

**New Mexico Mortgage Finance Authority (MFA)**

**Request for Qualifications for**

**Architectural and Engineering Design Services and Administration of General Contractor**

**Part I: Background & General Information**

**Introduction**

The New Mexico Mortgage Finance Authority (MFA) is a governmental instrumentality, separate and apart from the state, created by the Mortgage Finance Authority Act, N.M. Stat. Ann. Sections 58-18-1 1978 *et seq*. (1978) for the purpose of financing affordable housing for low- and moderate-income New Mexico residents.

**Purpose**

The purpose of this Request for Qualifications (RFQ) is to invite the submittal of qualification statements, in accordance with MFA Procurement Policy, from highly qualified, capable persons or firms, who by reason of their skill, knowledge, and experience are able to furnish MFA with architectural and engineering design services and administration of general contractor (Offeror) the following:

* Space needs assessment
* Design new location to meet MFA needs
* Develop design for scope of work for contractor
* Work with and oversee contractor work
* Review and approve contractor invoices before submitted to MFA for payment
* Contract close out with contractor

The Scope of Work is outlined in Part II of the RFQ, below. The Minimum Qualifications and Requirements for this RFQ are outlined in Part III of this RFQ, below. Qualification statements must address all elements outlined in the Minimum Qualifications and Requirements of this RFQ.

**Questions and Answers**

Questions pertaining to this RFQ must be submitted via the MFA website at <http://www.housingnm.org/rfp> . Under “Current RFPs” select “RFQ to Provide Architectural and Engineering Design Services and Administration of General Contractor.” On the RFQ-specific page, select the “Architectural and Engineering Design Services and Administration of General Contractor FAQs” link. Questions will be checked on a daily basis. The FAQ will open the day after the RFQ issues and will close on August 24, 2022. This timeline may be extended at MFA’s discretion. To submit your questions, scroll down to the “Ask a question” section, enter your name, e-mail address, and type your question in the “Question” box, type in the two words in the CAPTCHA box and click on “Send my question.” MFA will make every attempt to answer questions within two business days.

**Proposal Submission**

One (1) original and one (1) electronic PDF copy (provided on CD or via email) to [jhalbig@housingnm.org](mailto:jhalbig@housingnm.org) of the Offeror’s submission must be received by MFA, no later than August 24, 2022 at 4:00 PM, Mountain Standard Time. This timeline may be extended at MFA’s discretion. Submissions shall be in sealed envelopes marked “Response to Architectural and Engineering Design Services and Administration of General Contractor RFQ.” Submissions will be opened and the review will begin after the deadline established for receipt of Submissions. Submissions will not be opened publicly and will not be available for public inspection until after the approved Offeror has been finalized.

Please send submission to:

Julie Halbig, Director of Compliance and Initiatives

New Mexico Mortgage Finance Authority

jhalbig@housingnm.org

**Proposal Tenure**

All submissions shall include a statement that the proposal shall be valid until after the list of approved providers has been finalized, but no more than 60 calendar days from the proposal due date.

**RFQ Revisions and Supplements**

If it becomes necessary to revise any part of this RFQ or if additional information is necessary to clarify any provision of this RFQ, the revision or additional information will be provided on the MFA website.

**Incurred Expenses**

MFA shall not be responsible for any expenses incurred by an Offeror in responding to this RFQ. All costs incurred by Offerors in the preparation, transmittal or presentation of any proposal or material submitted in response to this RFQ will be borne solely by the Offerors.

**Cancellation of Requests for Proposals or Rejection of Proposals**

MFA may cancel this RFQ at any time, for any reason and may reject all proposals (or any proposal) which are/is not responsive.

**Evaluation of Proposals, Award Notice and Engagement Letters**

Proposals will be evaluated by the Internal Review Committee of MFA staff using the criteria listed in Part V: Evaluation Criteria. The Internal Review Committee will make a recommendation to the Property Committee. MFA shall provide written notice of the award to all Offerors within 10 days of the date of the award.

For any given engagement, MFA reserves the right to select the Offeror that best serves MFA’s interests. No one factor in the Evaluation Criteria will solely determine the Offeror but will help MFA determine the Offerors to interview. MFA intends to interview the highest scoring Offerors as determined by the Evaluation Criteria. The basis for individual selections will be documented by MFA. MFA shall require Offeror(s) to enter into an engagement letter signed by both parties upon engagement.

**Proposal Confidentiality**

Offerors or their representatives shall not communicate with MFA’s Board of Directors or staff members regarding any proposal under consideration or that will be submitted for consideration, except in response to an inquiry initiated by the Internal Review Committee, or a request from the Board of Directors for a presentation and interview. A proposal will be deemed ineligible if the Offeror or any person or entity acting on behalf of Offeror attempts to influence members of the Board of Directors or staff during any portion of the RFQ review process, including any period immediately following release of the RFQ.

Until the award is made and notice given to all Offerors, MFA will not disclose the contents of any proposal or discuss the contents of any proposal with an Offeror or potential Offeror, so as to make the contents of any offer available to competing or potential Offerors.

**Irregularities in Proposals**

MFA may waive technical irregularities in the form of proposal of any Offeror selected for award which do not alter the price, quality or quantity of the services offered. Note especially that the date and time of proposal submission as indicated herein under Part I: Background and General Information, Proposal Submission cannot be waived under any circumstances.

**Responsibility of Offerors**

If an Offeror who otherwise would have been awarded a contract is found not to be a Responsible Offeror, a determination that the Offeror is not a Responsible Offeror, setting forth the basis of the finding, shall be prepared and the Offeror shall be disqualified from being placed on a list of approved providers. A Responsible Offeror means an Offeror who submits a proposal that conforms in all material respects to the requirements of this RFQ and who has furnished, when required, information and data to prove that his financial resources, facilities, personnel, reputation and experience are adequate to make satisfactory delivery of the services described in this RFQ. The unreasonable failure of an Offeror to promptly supply information in connection with an inquiry with respect to responsibility is grounds for a determination that the Offeror is not a Responsible Offeror.

**Part II: Services to Be Performed**

Services to be provided under this RFQ could include, but are not limited to, space needs assessment, design of new building space and administration of general contractor. While the below scope of work summarizes all the work that could be done with MFA, the specific scope of work for each engagement will be memorialized in an engagement letter.

* 1. **Conduct a Space Needs Assessment**

MFA has doubled in size in the number of full-time employees within two (2) years. The Offeror must be able to conduct a space needs assessment based on MFA’s current number of employees and work arrangements as well as assist in how a space might be able to adapt to MFA’s expected expansion.

* 1. **Evaluate and Design New Location**

MFA will consider multiple properties in the search for a new location in an existing building. MFA needs the experience of Offeror in evaluating the pros and cons to various building. For those properties (not to exceed 3 sites) that are being seriously considered, Offeror will assist MFA in designing out the space to help narrow the choice for which building site is optimal to meet MFA’s short and long-term needs.

* Offeror shall review MFA’s scope of work, budget and schedule and reach an understanding with MFA of the Project’s requirements.
* Based on the Project’s requirements, the Offeror shall develop a design which shall be set forth in drawings and other documents appropriate for the Project.
* Upon MFA’s approval of the design, the Offeror shall prepare Construction Documents indicating requirements for construction of the Project.
* The Offeror shall assist MFA in filing documents required for the approval of governmental authorities in obtaining bids or proposals and awarding contracts for construction.
* Offeror shall assist MFA in determining consulting services required for the Project. The Offeror’s services include the following consulting services, if any:
  + Mechanical, Electrical and Structural Engineers as needed with prior approval of MFA.
  1. **Develop Design for Contractor Scope of Work and Administration of General Contractor**

During the Construction phase of the Project, the Offeror shall act as MFA’s representative and provide administration of the Contract between MFA and the General Contractor.

Offeror will be responsible for developing the design for the General Contractor’s scope of work:

* + 1. Construction documentation (including but not limited to construction documents (plans and specifications), contracts, permits, construction schedule, etc.) to determine if it is adequate, complete, and acceptable;
    2. As needed, review of Phase I Environmental Assessment report, if any, and, if applicable, U.S. Department of Housing and Urban Development (HUD) Environmental Assessment approval to determine if all environmental recommendations, if any, are incorporated into the plans and specifications and construction documentation; and
    3. As needed, review of geotechnical reports, if any, to determine if all engineering recommendations are incorporated into the plans and specifications;

Oversight of all general contractor work including setting deadlines, and review and approval of all contractor invoices.

* + 1. Conduct standard verifications of general contractor’s monthly application for payment on behalf of MFA including:
       1. Conduct monthly inspections throughout construction prior to each construction loan draw. Timing of on-site inspections shall coincide with onsite project meetings between the construction project manager, architect and owner. Construction inspections shall be conducted in order to:
          1. Review draw requests;
          2. Determine percent of work completed by line item;
          3. Determine "value in place”;
          4. Review change orders;
          5. Inspect stored materials; and
          6. Review adequacy and completeness of invoices and lien waivers.
    2. Submit a written report to MFA to address each of the items above within ten (10) calendar days of the date of the onsite field inspection. Written reports shall include a recommendation as to approval or disapproval of each payment request and release of funds, complete with photographs.
  1. **Close Out with General Contractor**

Offeror will be responsible for close out walk through with general contractor to ensure that all building specs and design were followed and completed according to applicable standards including:

* + 1. Inspect assigned project upon completion of construction.
    2. Review certificates of occupancy, project architect's certification and all other completion documentation.
    3. Preparation of as built drawings.
    4. Submit final report within fifteen (15) calendar days of the completion inspection, which must specifically state that the project as built:
       1. Conforms to the original plans and specifications (with any changes approved by MFA);
       2. Meets all applicable state and local codes, ordinances, and zoning requirements;
       3. Meets the accessibility requirements of Section 504 of the Rehabilitation Act of 1973, Titles II and III of the Americans with Disabilities Act, the Fair Housing Act, or any other applicable federal, state and local standards.

**Part III: Minimum Qualifications and Requirements**

1. Only those Offerors who meet the following minimum qualifications are eligible to submit a proposal pursuant to this RFQ:
2. Offeror must demonstrate that it has significant, current experience/knowledge in/of the development, design, renovation and retrofit of office spaces to accommodate a multitude of needs including public meeting rooms, kitchenette and storage of IT equipment. A minimum of five (5) years experience with this work.
3. Offeror must be licensed/registered/certified in the state of New Mexico and in good standing pursuant to the relevant licensing laws.
4. Selected Offerors must also meet the following requirements:
   1. Offeror or Offeror’s family may not have any financial interest in any proposed project or development team[[1]](#footnote-1) or undertaken prior work for a development team of a proposed project that is the subject of an engagement pursuant to this RFQ. MFA will not engage an Offeror for a project in which the Offeror has a conflict.
   2. No Board member or employee of MFA shall have any direct financial interest in any contract with the Offeror, nor shall any contract exist between Offeror or its affiliate with any MFA Board member or employee that might give rise to a claim of conflict of interest. Any violation of this provision will render void any contract between MFA and the Offeror for which MFA determines that a conflict of interest exists as herein described, unless that contract is approved by MFA’s Board of Directors after full disclosure.
   3. Offeror shall provide a statement disclosing any political contribution or gift valued in excess of $250 (singularly or in the aggregate) made by Offeror or on Offeror’s behalf to any elected official of the state of New Mexico currently serving or who has served on MFA’s Board of Directors in the last three (3) years.
   4. Offeror shall at all times conduct itself in a manner consistent with MFA’s Third-Party Code of Conduct and MFA’s Anti-Harassment Policy. A copy of MFA’s Third-Party Code of Conduct and MFA’s Anti-Harassment Policy is posted on the MFA website for review at http://www.housingnm.org/rfp. Upon request by MFA, Offeror shall disclose information MFA may reasonably request relating to conflict or potential conflicts of interest.
   5. Offeror shall provide written certification that Offeror is eligible to participate in any and all federal or state funded housing programs; is not currently facing disciplinary action by any federal, state or local entity; is not suspended, debarred or excluded from participation in any federal or state funded housing program; and is not listed as an excluded party(ies) on the System for Award Management’s list of excluded parties accessed at [www.sam.gov](http://www.sam.gov).
   6. Offeror shall be Equal Opportunity Employer and comply fully with all government regulations regarding nondiscriminatory employment practices.

**Part IV. Hourly Fees/Compensation**

Fee basis should be an all-inclusive, hourly fee, which should include staff time and “out-of-pocket expenses.” Offeror must provide an hourly fee breakdown for each staff position it would propose to use and/or make available to MFA for use as needed. Provide examples of similar, previous projects and their costs based on light, moderate and heavy renovations. Offeror must also state in their submission how long the Offeror can hold the all-inclusive hourly fee rates with the minimum amount of time being two years from the date of proposal and should address how increases will be negotiated. If selected, engagement letters with Offeror must reflect the all-inclusive, hourly fee rates proposed.

Billing on the project should occur on a frequency to be negotiated with successful Offeror(s) and will be based on hours spent on the project and associated costs.

**Part V: Evaluation Criteria**

1. **Minimum Threshold Requirements**

Responses must meet the following minimum requirements in order to qualify for further consideration:

* 1. The response must be complete and legible and must be submitted by the application deadline.
  2. Offeror must demonstrate that it has significant, current experience/knowledge in/of the development, design, renovation and retrofit of office spaces to accommodate a multitude of needs including public meeting rooms, kitchenette and storage of IT equipment.
  3. Offeror must provide evidence of being licensed/registered/certified in the state of New Mexico and in good standing pursuant to the relevant licensing laws as described in Part III.A.2 of this RFQ.
  4. Offeror must demonstrate at least five (5) years of experience providing a comparable scope of services contained herein (and as further described in Part III.A.1 of this RFQ).

1. **Evaluation of Submittals**

MFA shall select Offerors that are most advantageous to MFA. No one factor in the Evaluation Criteria will solely determine the Offeror but will help MFA determine the Offerors to interview. MFA intends to interview the highest scoring Offerors as determined by the Evaluation Criteria.. Proposals shall be scored on a scale of one to 110 based on the criteria listed below. Please note, however, that a serious deficiency in any one criterion may be grounds for rejection regardless of overall score.

Offeror meeting the minimum threshold requirements and achieving the maximum Evaluation Criteria score will be selected for the architectural and engineering design services and administration of general contractor.

|  |  |  |
| --- | --- | --- |
| **Criteria** | **Point**  **Range** | **Maximum Points** |
| 1. **Experience and Capability:**   Evaluation of the professional qualifications, background and experience of the Offeror, including:   * Expertise and experience in the development, design, renovation and retrofit of office spaces to accommodate a multitude of needs including public meeting rooms, kitchenette and storage of IT equipment. | **0-50** | **50** |
| 1. **Work Plan and Capacity**   Evaluation of Offeror’s work plan to provide the services.  Evaluation of Offeror’savailability and proposed timeline to provide services. | **0-20** | **20** |
| 1. **Hourly Fees/Compensation:**   The Offeror with the lowest average hourly fees will be awarded 20 points. All other Offeror(s) will receive a lower number of points proportionate to the difference in the average fees. | **0-20** | **20** |
| 1. **References:** | **0-10** | **10** |
| 1. **Interview** | **0-10** | **10** |
| **Maximum Points** |  | **110** |

**Part VI: Offeror Submission Instructions and Format**

Submissions must, at a minimum, contain the following information and shall be organized as follows:

1. Letter of Transmittal – to include at least the following information:
   1. Name, address and telephone number of Offeror and name of contact person;
   2. A signature of the Offeror or any partner, officer or employee who certifies that he or she has the authority to bind the Offeror;
   3. Date of submission;
   4. A statement that the Offeror will comply with the terms and conditions set forth in this RFQ and in any engagement letter;
   5. A statement describing how long the Offeror can hold the all-inclusive hourly fee rates, with the minimum being two years from date of proposal, and how future increases will be negotiated;
   6. The location of Offeror’s main office and the locations of any of Offeror’s branch offices.
2. Disclosures and Certifications
3. Offeror shall provide a statement disclosing: (1) any political contribution or gift valued in excess of $250.00 (singularly or in the aggregate) made by Offeror to any elected official of the state of New Mexico currently serving or who has served on MFA’s Board Directors in the last three years; (2) any current or proposed business transactions between Offeror and any MFA member, officer or employee; (3) any affordable housing project or development team that Offeror or Offeror’s family has a financial interest or has undertaken prior work; and (4) any other conflict or potential conflict which may give rise to a claim of conflict of interest, in particular pursuant to Part III.B of this RFQ.
4. Offeror shall provide a statement disclosing any pending investigation, litigation, recent settlements or regulatory sanctions in performing professional services during the past five years involving Offeror’s firm or employees or individuals or organizations involved in any third-party agreements or joint venture agreements. Describe any circumstances under which Offeror’s firm or any of Offeror’s members or employees have been disciplined by any professional licensing, regulatory or ethics entity. Indicate whether Offeror’s firm has been involved in any capacity in litigation, investigations or regulatory proceedings involving HUD, the State of New Mexico or any agency thereof.
5. Offeror shall provide MFA with written certification that Offeror is eligible to participate in any and all federal- or state-funded housing programs; is not currently facing disciplinary action by any federal, state or local entity; is not suspended, debarred or excluded from participation in any federal- or state-funded housing program; is not listed as an excluded party on the System for Award Management’s list of excluded parties accessed at [www.sam.gov](http://www.sam.gov).; and has not been debarred by MFA.
6. Offeror shall provide MFA with written certification that Offeror has read and shall at all times conduct itself in a manner consistent with MFA’s Third-Party Code of Conduct and MFA’s Anti-Harassment Policy.
7. Offer shall provide MFA with a written statement that Offeror is an Equal Opportunity Employer and complies fully with all government regulations regarding nondiscriminatory employment practices.
8. Experience and Capability
9. Statement describing experience and technical capability and capacity to provide responsive and professional services to MFA and to address Evaluation Criterion 1 as described in Part V.B of the RFQ.
10. A description of New Mexico clients for which Offeror has worked or performed services, currently or in the last 5 years.
11. Names and resumes of the key personnel including team lead and support staff to be assigned to MFA engagements.
12. Proof that Offeror is licensed/registered/certified in the state of New Mexico and in good standing pursuant to the relevant licensing laws.
13. Work Plan and Capacity
    1. Offeror’s proposal for delivering services, including organization of responsibilities, approach, and the availability of personnel for consultation and discussion, as necessary to serve the needs of MFA. Please include steps and time frames to complete all of the tasks described in Part II of the RFQ.
    2. Detailed discussion of Offeror’s staffing and other elements of its capacity to complete the scope of services specified in Part II of this RFQ.
14. Hourly Fees/Compensation

Fee basis should be an all-inclusive, hourly fee, which should include staff time and “out-of-pocket expenses.” Offeror must provide an hourly fee breakdown for each staff position it would propose to use and/or make available to MFA for use as needed. Provide examples of similar, previous projects and their costs based on light, moderate and heavy renovations. Offeror must also state how long the Offeror can hold the all-inclusive hourly fee rates with the minimum amount of time being two years. If selected, engagement letters with Offerors must reflect the all-inclusive, hourly fee rates proposed. Please include a statement as to whether the Offeror’s proposed rates are the best offered by the firm to similarly situated clients for similar services.

1. References
   1. Names of at least five references of persons who have worked with the same key personnel proposed. MFA will contact Offeror’s references and evaluate references that do respond.
2. Other
   1. Ensure that a performance bond is secured in the amount equal to the agreed upon contract

price.

* 1. Offers must provide proof of professional liability insurance or comparable

protection with the limit of $1,000,000 per claim.

* 1. Please provide any other relevant information which will assist MFA in evaluating Offeror’s

ability to provide the services as described herein to MFA.

**New Mexico Mortgage Finance Authority**

**Board Members**

Chair Angel Reyes—President, Centinel Bank in Taos

Vice Chair Derek Valdo – Chief Executive Officer, AMERIND Risk

Treasurer Rebecca Wurzburger – Strategic Planning Consultant

Member Howie Morales—Lieutenant Governor, State of New Mexico

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Member, Patricia Sullivan, Ph.D. – Associate Dean, New Mexico State University, College of Engineering

**Management**

Isidoro Hernandez, Executive Director/CEO

Lizzy Ratnaraj, CPA, Chief Financial Officer

Donna Maestas-DeVries, Chief Housing Officer

Jeff Payne, Chief Lending Officer

1. “Development Team” includes any person or entity with any ownership or proposed ownership interest in the project, and the proposed builder or subcontractor, management agent, architect, lender, proposed equity investor or other proposed vendor or service provider with respect to the project. [↑](#footnote-ref-1)