



Request for Proposals  
Professional Design Services  
for the Design of Modular Housing

RFP #: HCDCmodularhousing-2022  
Pre-Proposal Conference at 3:00 PM on March 28<sup>th</sup>,  
2022 Proposals Due on April 11<sup>th</sup>, 2022

**REQUEST FOR PROPOSALS # HCDCmodularhousing-2022**  
**PROFESSIONAL DESIGN SERVICES FOR THE DESIGN OF MASS TIMBER MODULAR HOUSING**

To: Prospective Architectural Firms  
Subject: Request for Proposals for  
Professional Design Services for the Design of Modular Housing

Issue Date: March 21<sup>st</sup>, 2022

Due Date: All Proposals need to be delivered by 5:00 PM on April 11<sup>th</sup>,  
2022, to Hacienda CDC located at 6700 NE Killingsworth Street,  
Portland, OR 97218

RFP Contact: Ernesto Fonseca  
Chief Executive Officer  
Hacienda CDC  
6700 NE Killingsworth Street  
Portland, OR 97218  
email: [modularhousing@haciendacdc.org](mailto:modularhousing@haciendacdc.org)

Pre-Conference: March 28<sup>th</sup> 3:00 PM via zoom  
[Zoom Meeting](#)  
Attendance is optional but strongly encouraged

No documents are available for this RFP. All designs and materials will be original.

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## I. INTRODUCTION

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Hacienda CDC is a Latino Community Development Corporation that strengthens families by providing affordable housing, homeownership support, economic advancement, and educational opportunities.

During the 2021 Oregon Legislature Special Session both, the Port of Portland and Hacienda CDC received a \$5MM grant to prototype the design, development, and installation of volumetric mass timber modular housing. Through this prototype exercise, Hacienda CDC, Design Consultant and Construction Company will design and develop modules that can stand alone as a single floor studio or through a combination of two, three or four modules a two-to-three-bedroom modular volumetric house.

**For the purposes of this RFP consider the following definitions:**

- i. **Modular House:** A home-structure assembled primarily with mass timber panels.
- ii. **Module:** A standardized modular house section or 'room' that can be used to serve as a single room home, or combined to construct a more complex and greater structure (house).
- iii. **Unit:** A combination of two or more modules to develop a bigger house up to three bedrooms.

### A. Notice

#### **Hacienda CDC request for proposals #HCDC modularhousing-2022 Professional design services for the design of mass timber modular housing**

Proposals are requested from qualified professional architectural firms that will lead a design and engineering (A&E) team to prototype the design and development of volumetric mass timber modular housing units.

The A&E team will collaborate closely with the Hacienda Modular Housing Project Manager and Construction company contracted to build, transport, and complete each module to develop the best and most efficient modular housing possible. In addition, the A&E team will be responsible for designing the site improvements to receive the modules including, coordinating all required permitting processes with any necessary regulating entities. These modules will be sited/tested across the state. (Sites and jurisdictions remain to be selected).

NOTE: Once design development reaches 60-80% completion, Hacienda CDC will release an RFP for construction services.

The Hacienda CDC Modular Housing Project has a goal of 20% participation by firms certified by the State of Oregon's Certification Office for Business Inclusion & Diversity (COBID) for all contracts. Interested COBID certified firms are encouraged to submit Proposals or participate as sub-consultants.

**RFP Contact:** Dr. Ernesto Fonseca  
Chief Executive Officer  
Hacienda CDC  
6700 NE Killingsworth Street  
Portland, OR 97218  
email: [modularhousing@haciendacdc.org](mailto:modularhousing@haciendacdc.org)

A pre-proposal conference will be held on March 28<sup>th</sup> at 3:00 PM via zoom at [Zoom Meeting](#). Attendance is optional but strongly encouraged.

## **B. Architectural Firm**

The successful Respondent will demonstrate the following attributes: a diverse and highly qualified team; a commitment to design excellence; exemplary problem-solving skills; intellectual flexibility; strong graphic, written, and oral communication skills; and all resources necessary to successfully execute the Project. Experience designing modular units or working with advanced wood products is helpful but not required.

The Architectural Firm's work will begin with schematic design of the modules in close collaboration with the Hacienda CDC team and soon move into the full design phase and prototype production.

Capacity: The selected Firm will have the necessary capacity to deliver design and construction documents in a very short period of time, with the goal to start production by the first week of July 2022. Specific A&E schedules will be generated in collaboration with selected A&E team after award.

NOTE: Given the prototyping nature of these modules, the A&E team is expected to work closely with the construction company project managers and Hacienda CDC staff to seek solutions and inform decision-making. This type of module will be one of the first in the nation. Optimization and cost containment are key to the future success of a larger manufacturing process. Hacienda's project manager experienced in manufacturing processes will document the design and construction process and make recommendations in collaboration with all consultants on process optimization. Expert huddles may include mass timber manufacturers, builders, research and development experts, Hacienda CDC staff, additional external consultants if and as needed, sub-contractors, etc. All of whom will act as thought and expert partners.

The distinction “thought and expert partners” is central to this process. The A&E team is expected to communicate this requirement to their sub-consultants. The same requirement will be required of the selected construction company and their sub-contractors.

**C. Contract**

The selected A&E firm will enter into a design services agreement which will be provided and negotiated after final selection and award.

The Agreement will contain progressive phases of the Work, beginning with a kickoff design meeting. Subsequent phases will be authorized by amendments to the Agreement.

**D. RFP Schedule**

The following schedule is subject to change. Hacienda CDC reserves the right to deviate at any time from this schedule.

Item	Description	Date	Time/Location/Method
1	RFP Issue date	March 17 <sup>th</sup> , 2022	Hacienda Website & Mass Distribution via Email
2	Pre-conference	March 28 <sup>th</sup> , 2022 - 3pm	<a href="#">Zoom Meeting</a>
3	RFP due date	April 11 <sup>th</sup> , 2022	By 5:00 PM hard copy delivered to 6700 NE Killingsworth St. Portland, OR 97218
4	Finalists Interviews	April 20 <sup>th</sup> , 2022	In-person between 9:00 AM & 12:00 PM
4	Award announcement	May 2 <sup>nd</sup> , 2022	Via email

**II. SCOPE OF SERVICES**

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**A. Statement of Work**

For the purposes of this RFP assume the following:

- i. The intended population for the Hacienda Modular Homes will be the general population with a priority to serve low- and moderate-income earners at 80 percent Area Median Income (AMI) or below.
- ii. Hacienda CDC will select a minimum of three sites in Oregon, including one in the Portland Metro Area, to place and test these units.
- iii. Subject to site selection and other factors, the selected sites will tentatively include:
  - a. Site one: Four modules branded as studios.
  - b. Site two: Three two-bedroom units comprising multiple modules. The number of modules per unit will be determined by design.

- c. Site three. Two three-bedroom units comprising multiple modules. The number of modules will be determined by design.

NOTE: The distribution of modules and site configuration may vary, depending on design and needs identified by jurisdictional partners. For example, Hacienda CDC team and selected jurisdictional partners may determine that having a site with a mix of unit sizes better meets the needs of the community.

### **A.1 About the module (basic unit)**

The Hacienda Modular Housing Modules must be designed to allow them to be assembled similar to “Lego blocks,” enabling the expansion of these modules from one studio up to a three-bedroom unit.

All modules must be designed to be transportable as freight to any location. The design must include the following:

- i. Modules need to be no more than 450 sqf and no less than 400 sqf.
- ii. Modules will be the same dimensions and need to be transportable by traditional freight modalities (truck, trailer, barge, etc).
- iii. Modules need to be able to be assembled with other modules to create bigger housing units.
- iv. The Hacienda Modular Housing Units must be designed to be completely finished into a home, including MEP, roofing, flooring, windows, fixed furniture, appliances, finishes, siding, etc.
- v. Module design, systems, and construction need to be optimized for cost, transportability, ease of installation, and expedited delivery.

### **B. Design Services**

The design and development of mass timber housing is relatively new and there is no significant literature outlining methodologies, design examples, finishes, and MEP installations. For purposes of this RFP assume you will provide the following:

- i. Architectural design, all phases culminating with a full set of permittable Construction Documents.
- ii. Civil and engineering including public works at each location.
- iii. Structural design and engineering.
- iv. Mechanical, electrical, plumbing and fire systems design and engineering.
- v. Interior design, including space planning and furniture selection.
- vi. Traffic study and engineering if necessary.
- vii. Envelop and constructability services if needed.
- viii. Minimal landscape design.
- ix. Optimize for energy efficiency.
- x. Coordinate all geotechnical and site work as needed. (Environmental, Geotech, etc.)

- xi. Process and obtain all construction and installation permits per jurisdiction.
- xii. Coordinate cost estimates in collaboration with Hacienda CDC project manager and team.
- xiii. Coordinate and support GC with design, systems, and finishes questions as needed.
- xiv. Attend weekly meetings, prepare and coordinate the distribution of materials with the Hacienda CDC project manager.
- xv. Before the design phase starts, facilitate a short participatory design charrette with selected stakeholders in collaboration with Hacienda CDC.

### **C. Construction Services Phase**

The final Construction/Prototyping Services Phase scope of work will be determined concurrently with the Design Services Phase and is likely to include the following tasks:

- i. Attend regularly scheduled construction meetings
- ii. Conduct site visits, issue reports
- iii. Respond to RFIs
- iv. Review payment applications
- v. Prepare and distribute punch lists
- vi. Assist Hacienda CDC in identifying and scheduling appropriate training for operations staff if needed.
- vii. Participate in one-year warranty inspections, prepare and distribute written reports.

## **III. SUBMISSION REQUIREMENTS**

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### **A. Content Specifications**

To be considered responsive and responsible, adhere to the following requirements. Respond only to the items listed below and include only relevant information. Responses must be specific and complete unto themselves. Do not include lists (past projects, past clients, etc.) unless specifically requested to do so. The Selection Committee (Committee) will not review materials that are not requested. Any submittal that, in the opinion of Hacienda CDC, 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. There is no requirement to submit the maximum number of pages. For purposes of this RFP, "major team members" include architect, civil engineer, landscape architect, structural engineer, MEP engineer(s), and building science experts.



## **A.1 Cover Letter**

- i. Introduce the Architectural Firm, the consultant team and key personnel.
- ii. Describe the team's interest in the Project and design philosophy.
- iii. 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.

## **A.2 A&E Team Information**

- i. Business name & address
- ii. Brief description of major team members, including years in business, areas of expertise, professional credentials, number of current staff by position, and COBID certification (if applicable). Describe the capacity of major team members to engage in the Project given current commitments and timeframe of this project.
- iii. Identify personnel assigned to design services, and construction services phases. Include project managers, lead designers, engineers, and other key positions necessary to execute the work. Provide a brief biography of each that includes relevant past work. Multi-family housing experience is beneficial but is not mandatory. Describe the approximate amount of time each person will devote to the project during each phase of work. Resumes may be included in an Appendix and will not be counted within the page limit.
- iv. State whether the major team members are currently or have 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). Hacienda CDC reserves the right to request more information on all claims disclosed.

## **A.3 Design Portfolio**

Describe the major team members' recent experience in design and construction of at least three (3) but no more than four (4) built projects that are structurally and/or programmatically compatible with the project in terms of design.

Typical structural similarities are public funding, public ownership, development team structure, robust community engagement, multiple phases, modular or manufactura housing, mass-timber design, etc.

Typical programmatic similarities are contextual considerations, single-family housing programs, building size and scale, design excellence and innovation, construction type and quality, etc.

For each portfolio project, please provide the following:

- i. Names of developer(s), major team members, and personnel proposed for the Hacienda Modular Housing Project who worked on the portfolio project.
- ii. Sample unit photographs and/or renderings, if available.
- iii. A brief narrative of notable urban design, architectural, and construction features. This is an opportunity to highlight the A&E Team's commitment to design excellence and exemplary problem-solving skills.
- iv. The architectural program. For single-family housing developments, include the number of units, totally built square footage, and tenancy of residents (i.e., affordable housing, market-rate housing).
- v. Provide any specific example of modular housing if any, regardless of the construction techniques used.
- vi. Total construction cost.
- vii. Total A&E Team fees.
- viii. References. For each project presented, provide current contact information for at least one (1) person familiar with the team member'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.

#### **A.4 COBID Participation, Equity, and Diversity:**

Hacienda CDC goal is to secure at least 20% project participation by State of Oregon COBID certified firms. Participation is measured by contract value. For this portion, please provide the following:

- i. The Team's plan to meet the goal of this Project.
- ii. An estimated value of the scope that will be completed by COBID certified firms
- iii. The Architectural Firm's history and experience in contracting with COBID certified firms (Responders may include details of past projects in the Design Portfolio section)
- iv. Major team members' current workforce diversity statistics. Please note if any team members are Bilingual (Spanish/English).
- v. Major team members' goals and policies to promote workforce diversity.

## **A.5 Environmental and Social Responsibility**

Environmental and Social Responsibility. For the Architectural Firm only, describe the following:

- i. Its approach to green building (Responders may include details of past projects in the Design Portfolio section).
- ii. Its policies, programs, or practices to promote a fair and equitable workplace.
- iii. Its involvement in the community.
- iv. Include International Living Future Institute JUST scorecard, if available.

## **A.6 Cost**

- i. Provide a lump sum cost to complete the design phase. Include sufficient detail to describe the fee of each A&E Team member that will work on the design and engineering work.
- ii. Provide hourly rate sheets for major team members.

## **A.7 Licenses**

- i. Provide proof of State of Oregon professional licensure and proof of City of Portland business licensure for architects.

## **A. Format Specifications**

Each Proposal shall comply with the following specifications.

- i. 8.5" x 11" format, either vertical or horizontal
- ii. Font size no smaller than 10 points
- iii. The Proposal shall not exceed 25 pages. Only the first 25 pages will be evaluated. The page limit does not include a cover page or the Fee Proposal. Do not include section dividers or other extraneous material.
- iv. Submit one (1) full-color hard copy original of the Proposal secured with a binder clip. Do not bind the original. The proposal shall be enclosed in a sealed envelope marked with the Project title, RFP number, and the name and address of the Architectural Firm.

- v. Submit one (1) full-color hard copy original of each of the following appendix items secured with a binder clip. Do not bind the appendices. These pages will not be counted within the page limit. Submit in the same envelope as the proposal.
  - a. Resumes of major team members' personnel assigned to the Project
  - b. Hourly rate sheets for major team members
  - c. Proof of State of Oregon professional licenses
  - d. Proof of City of Portland Business licenses
  - e. Certificate of Non-Discrimination (Architectural Firm only)
  - f. Copy of the executed joint-venture or other partnership agreement (if applicable).
  - g. Insurance capacity (specific requirement will be outlined with award)
  - h. Fee Proposal
- vi. In the same sealed envelope containing the original Proposal, including a USB flash drive with two (2) Portable Document Format (.pdf) files:
  - b. a. Proposal
  - c. b. Appendices
  - d. All electronic material should be designed to print in full color.

## **VI. PROPOSAL EVALUATION AND AWARD**

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### **A. Evaluation Process**

For this RFP a five-step evaluation process will be implemented.

Step 1: Determine if Proposal is complete and meets application requirements

Step 2: Evaluate Proposals

Step 3: Determine initial scoring and Proposals in the Competitive Range

Step 4: Interview Respondents in the Competitive Range and final scoring

Step 5: Select the best qualified A&E Team

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

A Selection Committee (Committee) will be formed to evaluate the responsive Proposals and shall apply the evaluation criteria and scoring set forth in Part B of this section. The Committee will determine which and how many Proposals are finalists.

Hacienda CDC will provide written notice via email to all Respondents that are selected as finalists.

## **B. Evaluation Criteria**

The following evaluation criteria will be implemented to rate all proposals.

Evaluation Criteria	Points
Architectural and Engineering Team & Experience	35
Design Portfolio	30
COBID Participation, Equity & Diversity	15
Social and Environmental Sustainability	5
Cost	15

## **C. Interview of Respondents in Competitive Range and Scoring Revisions**

Interviews of all Finalists will be conducted by the Committee. Upon conclusion of the interviews, the Committee may 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, Proposals, and revise scores.

The Committee will rank the Respondents in the Competitive Range and recommend the most advantageous Respondent based on the final scores. Hacienda CDC's Chief Executive Officer will consider the recommendation of the Committee and will make a final recommendation to Hacienda CDC's Board of Directors. The Board will authorize the execution of the contract.

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

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### **A. Clarifications, Addenda, Protests of RFP Terms and Conditions**

Respondents are cautioned not to make any assumptions as to the implied meaning or intent of any part of the RFP. Respondents should request clarification and/or additional information concerning the RFP in writing as soon as possible, but in no event will such requests be received by Hacienda CDC via email later than 4:00 PM on April 6th, 2022. If, in Hacienda CDC'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 Request for Proposals. Any corrections or clarifications made in any manner other than by written addendum addressed to all Respondents will not be binding on Hacienda CDC and Respondents shall not rely thereon upon.

Any prospective Respondent who contends that the terms and conditions of this RFP, 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 Hacienda CDC's 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 RFP, which must be received by Hacienda CDC on or before 4:00 PM on April 6th, 2022. 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. Clarifications of Statement of Proposals**

Hacienda CDC reserves the right to seek clarification of the written Proposals. Respondents will provide additional clarifying information in a timely manner.

## **C. Protests**

Following the initial scoring of Proposals, the Hacienda Selection Committee will invite finalists for an in-person interview. Following interviews, rescoring, and selection of most advantageous Respondent, Hacienda CDC will issue a Notice of Conditional Award.

- i. Conditional Award Protest. An adversely affected or aggrieved Respondent may submit a written protest of Hacienda CDC's decision regarding the Conditional Award. 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 Hacienda CDC's (a) error in failing to reject a non-responsive higher-ranked Proposal, or (b) substantial violation of a provision in the RFP or applicable procurement statute or administrative rule, or (c) error in evaluating and scoring the protesting party's Proposal, the protesting party would have been named to the Competitive or selected for Conditional Award.
- ii. Latest Date to Protest. Protests must be received by Hacienda CDC no later than the seventh (5th) calendar day from the date of the Hacienda CDC's Notice of Conditional Award, unless indicated otherwise in the letter.

- iii. Protest Delivery. Protest shall be delivered in hard copy to the address below no later than 4:00 PM on the protest due date. Late protests will not be considered. Any protests of this solicitation should be sent to:

**Dr. Ernesto Fonseca**

Chief Executive Officer

Hacienda CDC

6700 NE Killingsworth Street

Portland, OR 97218

- iv. At the request of the protesting party, a hearing may be deemed necessary. The hearing would be conducted before the Selection Committee or another person or team delegated by Hacienda CDC's Chief Executive Officer, within seven calendar days after submission of the written protest. The Selection Committee or any other party delegated by Hacienda CDC's Chief Executive Officer shall consider a written protest and issue a written decision on the protest. The Selection Committee 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. Selection of Sub-consultants**

Hacienda CDC reserves the right to accept or reject any sub-consultants to the Architect.

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

Hacienda CDC reserves the right to cancel this solicitation or reject any or all Proposals in whole or in part at any time before execution of a Contract by both parties if cancellation or disbandment is deemed to be in Hacienda CDC's best interest. In no event shall Hacienda CDC have any liability for disbandment or rejection of Proposals. Hacienda CDC reserves the right to waive irregularities or deficiencies in Proposals if Hacienda CDC determines that such waiver is in the best interest of Hacienda CDC.

**F. Cost of Proposal Preparation**

Respondents to this RFP undertake to provide a Proposal solely at their own expense. Under no circumstances whatsoever will Hacienda CDC be responsible for or reimburse any costs incurred in the preparation and presentation of Proposals, or for any related expenses or consequential damages of any kind.

## **G. References**

Hacienda CDC reserves the right to investigate references including references in addition to those listed in the response to this RFP. The investigation may include the past performance of the A&E Team member 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 Hacienda CDC, supportive references must be furnished.

## **H. Withdrawal of Response**

Any Proposal may be withdrawn by delivering a written request to Hacienda CDC at any time prior to the time set for delivery of Proposals. The request shall be executed by a duly authorized representative of the withdrawing Respondent.

## **I. Reservation of Rights Concerning RFP**

Hacienda CDC retains exclusive discretion and reserves the right to determine:

- i. Whether a Proposal is complete and complies with the provisions of this RFP.
- ii. Whether a Respondent should be allowed to submit supplemental information.
- iii. Whether irregularities or deficiencies in a Proposal should be waived.
- iv. Whether to seek clarifications of Respondents or request additional information necessary to permit Hacienda CDC to evaluate, rank, and select the most advantageous Proposal.
- v. Whether the Selection Committee should reconvene at any time and collectively review the scoring, making changes as the Committee deems appropriate.

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