

HOUSING DEPARTMENT

JUNE 7, 2011

TO: BRIDGE HOUSING, MERCY HOUSING, NATIONAL CORE

FROM: JAMES WONG

SUBJECT: ADDENDUM #3/TO HERITAGE SQUARE SENIOR HOUSING REQUEST FOR PROPOSALS

This addendum ("Addendum #3) consists of clarifications and modifications to the Heritage Square Very Low-Income Senior Rental Housing Request For Proposals document (the "RFP"), as well as instructions regarding resubmittal of proposal packages.

THRESHOLD REVIEW REQUIREMENTS - CLARIFICATION/MODIFICATION

Development Requirements – Unit Count and Size (RFP Section 1.4)

The concept plans for the proposed project must be based on a 70-unit development and adhere to the development requirements stipulated in the RFP. Furthermore, the proposed project must adhere to HUD 202 development requirements including dwelling unit size not to exceed 540 sq. ft.

<u>Development Requirements – Community Room (RFP Section 1.4)</u>

A minimum of twenty percent of ground floor frontage on both Painter Street and Fair Oaks Avenue shall be devoted to community room use which shall be available to the public on a reservation basis, as stipulated in Addendum #1, dated February 28, 2011. The project concept plans must clearly identify this space use as "Community Room" or "Community Space" and the proposed use of this space shall be described in the Project Narrative (Tab 1) and Design Narrative (Tab 15)

<u>Development Requirements – Compliance (RFP Form 3A)</u>

Complete and submit the attached new Form 3A "Development Requirements Compliance" which indicates that the proposed project concept satisfies the RFP development requirements (70 units, dwelling unit size not to exceed 540 sq. ft., minimum of 44 at-grade parking spaces, three-story building height maximum, community space with 20% frontage on both Fair Oaks and Painter). Insert new Form 3A (after Form 3) under Tab 1.

<u>Development Requirements – CalGreen Tier 1 Standards (RFP Form 29)</u>

Proposers must complete Form 29 such that all mandatory CalGreen Tier 1 standards per the RFP are itemized in the first column titled "Green Design Item". The other columns in the form should be completed as appropriate.

Mandatory Proposers' Conference (RFP Section 2.1)

At least one of the required Development Team Members must have attended the mandatory Proposers' Conference held on February 17, 2011. The following are considered "Development Team Members" for the purpose of the RFP: Developer as long-term managing partner, architect, mechanical engineer, civil engineer, landscape architect, structural engineer, electrical engineer, property management company, general contractor, service coordinator, and construction manager.

Financial Statements (RFP Section 3.3a.)

The referenced financial statements shall be dated no earlier than April 14, 2010. The financial statements are not required to be audited but must be prepared in accordance with generally accepted accounting practices.

Construction Manager (RFP Section 3.3k)

The construction manager's Pasadena experience must have been accomplished as a firm principal not as line staff for a construction management or construction firm.

OTHER MODIFICATIONS TO THE RFP

HUD 202 Funding (RFP Forms 9-15)

The development budget shall assume that all 70 units in the proposed development will be HUD 202 funded. Proposers shall re-calculate all applicable project financial proformas and resubmit modified Forms 9-15 as appropriate.

Funding Sources and Uses (RFP Form 15A)

Proposers shall complete new Form 15A (attached) indicating all proposed funding sources and uses. Insert new Form 15A (after Form 15) under Tab 3.

Prevailing Wage (RFP Forms 9-15)

The development budget must assume State prevailing wage standards. Proposers shall re-calculate all applicable project financial proformas and resubmit modified Forms 9-15 as appropriate.

Utility Allowances (RFP Forms 9-15)

Utility allowances for the proposed project shall be determined using the attached worksheet "Allowances for Tenant-Furnished Utilities and Other Services". Proposers shall re-calculate all applicable project financial proformas and resubmit modified Forms 9-15 as appropriate.

Green Design (RFP Section 3.4d)

The CalGreen Tier 1 Standards shall be scored as follows:

- Project exceeds mandatory requirements on 1 to 5 items: 2 points
- Project exceeds mandatory requirements on 6 to 10 items: 4 points
- Project exceeds mandatory requirements on 11 to 15 items: 6 points
- Project exceeds mandatory requirements on 16 to 20 items: 8 points
- Project exceeds mandatory requirements on 21 to 25 items: 10 points

Living Wage Compliance Certification (RFP Exhibit F)

Proposals shall complete and submit this certification if it wasn't included in the original submission.

INSTRUCTIONS FOR RE-SUBMITTAL OF PROPOSAL

Proposal packages shall include materials to address threshold requirement deficiencies noted in the Housing Department letter dated May 31, 2011 that was sent to each proposer, as well as in response to other aspects of the RFP that have been clarified or modified per this Addendum. Proposal packages must be submitted to the City of Pasadena Housing Department office by hand delivery no later than 5:00 p.m., Wednesday, June 22, 2011. The corrected package, consisting of one original and four copies, must be clearly identified as "Heritage Square Senior Housing RFP Proposal with Corrections.

Development Requirements Compliance (RFP Form 3A)

| Development Requirement | Project Complies w/ Requirement? ("Yes" or "No") |
|---|---|
| Project provides 70 dwelling units. | |
| Dwelling unit size does not exceed 540 sq. ft. | |
| Minimum of 44 at-grade parking spaces | |
| Building height does not exceed three stories | |
| Community space w/ 20% frontage along both Fair | SV2 |
| Oaks Ave. and Painter St. | |

Funding Sources and Uses (RFP Form 15A)

Predevelopment Period

| Funding Source | Amount | Brief description of use or other comments | | | |
|----------------|--------|--|--|--|--|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Construction Period

| Funding Source | Amount | Brief description of use or other comments |
|--|--------|--|
| | | |
| | | |
| | | |
| | | |
| | | |
| The same of the sa | | |

Permanent Financing

| Funding Source | Amount | Brief description of use or other comments | | | |
|---|--------|--|--|--|--|
| | | | | | |
| | | | | | |
| TOTAL SEPTEMBER | | | | | |
| | | | | | |
| 13.000000000000000000000000000000000000 | | | | | |
| | | | | | |

Allowances for Tenant-Furnished Utilities and Other Services

Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development Office of Public and Indian Housing

| Locality Pasadena | | Age 1980 to 1996 | | _{Init Type} Sarden and hi | gh rise apar | tments | Date (mm/dd/yyyy |
|--|---------------------------------------|--|---------------------------------------|---------------------------------------|--------------|--------------------|--------------------|
| Utility or Service | 9 14 | Monthly Dollar Allowances | | | | | |
| | | 0 BR | 1 BR | 2 BR | 3 BR | 4 BR | 5 BR |
| Heating | a. Natural Gas | 3 | 4 | 5 | 5 | ϵ | 157 (0.61) Test |
| * | b. Bottle Gas | 3 | 3 | 4 | 5 | | |
| | c. Electric | 7 | 9 | 10 | 12 | 1 13 | 1. |
| | d. Oil / Coal / Other | 4 | 5 | 5 | 6 | , 7 | |
| Cooking | a. Natural Gas | 11 | 13 | 14 | 15 | 17 | 1 |
| | b. Bottle Gas | 27: | 28 | 29 | 30 | 31 | |
| | c. Electric | 5 | 7 | 9 | 11 | 13 | |
| | d. Other | 0 | 0 | 0, | 0 | 0 | |
| Other Electric | | 21 | 28 | 35 | 42 | 49 | 56 |
| Air Conditioning | | 4 | 8 | 10 | 14 | | 19 |
| Water Heating | a. Natural Gas | 5 | 8 | 11 | 14 | 17 | 20 |
| | b. Boltre Gas | 5 | 7 | 10 | 12 | 15 | 17 |
| 33 | c. Electric | 9 | 14 | 19 | 22 | 26 | 29 |
| | d. Oil / Coal / Other | 19 | 22 | 26 | 30 | 33 | 37 |
| Valer | | 6 | 7 | 8 | 8 | 9 | 9 |
| Sewer | · · · · · · · · · · · · · · · · · · · | 0 | 0 | 0 | 0. | 0 | 0 |
| rash Collection | | 5 | 5 | 5 | 5! | 5 | . 5 |
| Range/Microwave | | 4 | 4 | 4 | 4 | 4 | 4 |
| Refrigerator | | 6 | 6 | 6 | 6 | 6 | 6 |
| ther - specify | | 0 | 0 | 0 | ol | 0 | 0 |
| ctual Family | Allowances To be us | sed by the family to co | mpute allowance | 1 | | Utility or Service | per month cost |
| Complete below for the actual unit rented. | | | | | | leating | \$ |
| lame of Family | | 100 | | | | Cooking | |
| | | | | | | Other Electric | * |
| ddress of Use | | The state of the s | · · · · · · · · · · · · · · · · · · · | | | Air Conditioning | |
| 001203 01 030 | | | | | 100 | Water Heating | · |
| | | | | | 100 | Water | |
| | | | | | ,~- | Sewer Callantin | |
| | | | | | - | rash Collection | |
| | | | | | - | Range/Microwave | |
| umber of Bedroo | ms | | | | | Refrigerator : | |
| | | | | | ٠, | ALCOHOL | |
| | | | | | Ī | otai (| <u> </u> |
| | | | | | | 1 | |