

**Request for Proposal for
Construction Cost Review and Audit Services**

**Northern Ponca Housing Authority
Ponca Heights Development**

**Open Date: May 26, 2023 at 10:00 A.M. CST
Close Date: June 12, 2023 at 4:30 P.M. CST**

I. INTRODUCTION & STATEMENT OF PURPOSE

About the Ponca Heights development

The mission of the Northern Ponca Housing Authority (NPHA) is to provide sustainable housing, home ownership and community development services to members of the Ponca Tribe of Nebraska (PTN) and other eligible Native Americans.

In keeping with this mission, NPHA is constructing a 20-unit (eight duplexes, one quad-plex) elderly and disabled housing development in Omaha, NE.

Statement of Purpose & Engagement Objective

NPHA seeks professional services to assist with the performance of construction cost review and audit services specific to NPHA's Ponca Heights project.

II. BID SPECIFICATIONS

Expected Responsibility

The selected firm will have the ability to provide knowledgeable staff and support with the requisite skills necessary to perform construction cost review and audit services specific to NPHA's Ponca Heights project. These services will include, but may not be limited to, the following:

1. Review and analyze the general construction contract. Provide specific recommendations for terms and conditions in the American Institute of Architects (AIA) - based Agreements.
2. Review change orders for accuracy and necessity. Ensure costs are reasonable and not already included in the initial contract.
3. Recommend risk mitigation processes, procedures and tools.
4. Review professional service and contractors' billings. Based on actual contract language, identify high risk areas and language or techniques to mitigate the identified risks.
5. Compare professional service and contractor billings to the terms and conditions of their underlying contract(s). Trace billings back to source documents to confirm cost validity.
6. Participate in and assist Owner review of Contractor's monthly pay applications (pencil/draft copy and final version as required). Provide written review comments and recommendations during each monthly pay application submittal.
7. Perform an initial contract review to validate all billable rates, multipliers, application of multipliers, etc.
8. Review billings for improper applications of payroll benefits, labor dues, etc.
9. Analyze labor, burden, overhead, profit and general conditions cost mark-ups.

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10. Identify and document costs submitted for reimbursement compared to contract terms and conditions.
11. Verify compliance with relevant terms and conditions of contracts such as insurance, bonding, letters of credit, target market, residence and local content.
12. Review equipment rental rates and charges for reasonableness and totality.
13. Provide a written report of findings and recommendations for recovery of amounts not billed consistent with the contract terms and conditions.
14. Assist with recovery, negotiation and settlement of disputed amounts and issues.
15. Perform initial, periodic, and final contract audits to facilitate contract close-out and cost reconciliations for final payments.
16. Recommend clarifications or improvements to ambiguous or inadequate contract terms.
17. Recommend improvements to owner's processes, procedures and controls incorporating industry best practices.

Relevant Experience

Please describe your firm's proven track record of providing similar construction cost review and audit services for large-scale transformation projects. It is highly preferred that the proposing firm have knowledge of public policy/law applicable to Omaha, NE.

Expected Contract Term

It is expected that the term of the engagement will continue until the completion and wrap-up of NPHA's Ponca Heights project. Thus, the engagement may continue until 2025 or later. Please indicate whether you are amenable to a term of this duration. NPHA will work with the selected firm to memorialize the engagement within a mutually agreeable contract document that may include annual statements of work based on the status of the project.

Proposed Fees/Pricing Proposal

Please provide your firm's estimated all-in fees and expenses, including estimated travel and other expenses to facilitate the services proposed. The use of any tools or software solutions your firm plans to use to support this engagement should be included in your fee estimate. Describe how your fee estimate may change year-over-year. Your fee estimate should include your firm's blended hourly rate for the services requested in this proposal.

Staffing

Please provide your recommended project team structure, including, but not limited to, key personnel and any consultants who will be assigned and dedicated to the project (including the percentage (%) time each key personnel are available to support the project), a roster of subject matter professional available to support the dedicated team as needed, and a list of any other anticipated resources your firm may assign to support

project. Detail should be provided regarding the location of the primary office for key personnel who will be assigned and dedicated to the project.

Please submit resumes/credentials of key personnel who will be working on our engagement.

NPHA fully expects that personnel included in the proposal will be assigned to the project. Any personnel added to the project team or changes of personnel in significant roles shall be subject to advance approval by NPHA.

Contact

Please provide contact information (name, phone number, email) for the key contact person at your firm who will be assigned to this project and responsible for engagement success.

References

Please provide a minimum of three (3) similar client references illustrating successfully provided services similar to those requested in this proposal within the last five (5) years.

Include the name of the company, a brief overview of the support your firm provided, the reference's contact person, telephone number, and email address, the specific years your firm provided support to the references, and a list of any of the proposed key personnel comprising the firm's proposed team structure to support NPHA who has experience supporting the firm's references.

Value Added Services

What do you believe sets your organization's services apart from your competition and what unique value-added services could you provide to NPHA? Please provide any additional information that makes you particularly qualified to handle this engagement for NPHA.

Conflicts of Interest

As part of our bid process, NPHA requests information about relationships and interests you or certain of your employees ("Key Individuals") have with NPHA so we can avoid conflicts of interest. Key Individuals include (as applicable): owners, board members, senior leaders, employees and anyone involved in decision-making for the potential transaction.

Please ask anyone who qualifies as a Key Individual at your company if they or any immediate family members have either a relationship with NPHA or a PTN affiliate.

In your response to this proposal, please indicate whether your company or any of its Key Individuals and their respective families is a PTN Key Individual or has any financial interest involving PTN or one of its affiliates. If yes, please provide a list with the name and title of each Key Individual and a description of the relationship or financial interest with PTN (e.g., "Jane Doe, President – Spouse"). If neither your company nor any Key Individual or Key Individual's family member has any relationship or financial interest involving PTN, please state "none."

III. EVALUTION CRITERIA

NPHA will include the following factors and criteria when evaluating Proposals for this bid:

- Relevant Experience
- Team / Key Staff
- Approach / Proposed Scope of Work
- Proposed Fee
- Overall Quality of Proposal
- Indian Preference (NPHA shall, to the greatest extent feasible, give preference in the award of proposals to Indian organizations and Indian owned economic enterprises.)

All respondents will be notified of the selection, once a final decision has been made. If you are requested to make an oral presentation, key members of the company should be prepared to discuss their capabilities as well as offer programmatic design suggestions and/or an overview of conceptual ideas.

Questions and proposals should be e-mailed to Don Magnuson, Director of Finance: don@poncahousing.org, by June 12, 2023.

NPHA deeply appreciates the effort required to submit a response to this proposal. Thank you in advance for your time and consideration.