

INVITATION TO SUBMIT PROPOSALS

Notice is hereby given that the Lincoln Housing Authority is accepting proposals for Capital Needs Assessment and Planning Services for 1,539 housing units.

The Lincoln Housing Authority will receive proposals until:

10:30 a.m. January 30, 2026
at the offices of Lincoln Housing Authority
5700 R Street, Lincoln, Nebraska, 68505

Proposals received after that time will not be accepted.

Specifications may be examined and/or obtained by contacting Ethan Platt at the Lincoln Housing Authority, 5700 R Street, Lincoln, NE 68505, phone (402) 434-5557 or email: ethan@l-housing.com. TDD 1-800-545-1833 ext.875.

Scope of Work

The Lincoln Housing Authority (LHA) is seeking proposals for Capital Needs Assessments for 1,539 units of rental housing. LHA is seeking to improve its ability to plan and budget for long term capital improvements, replacements, repairs, and other non-routine expenditures. LHA is requesting a 20-year plan to address the current, on-going, and future physical needs of LHA units. LHA is requesting separate plans for 20 different developments, and 3 administrative buildings.

A. Development Categories: LHA has divided the 1,539 rental units into 20 development categories/projects, and 3 administrative buildings. Each development will require a separate plan. More detailed descriptions and addresses are available upon request.

1. **Arnold Heights.** 463 units of affordable rental housing in the Arnold Heights neighborhood. Former housing for the Lincoln Air Force Base built in the 1950's and 1960's and acquired by LHA in 1970.
2. **Burke Plaza.** Section 8 New Construction elderly high-rise. Seven stories with 91 units. Built in 1978. Receives ongoing rental assistance from HUD.
3. **New 32.** Section 8 New Construction. 28 duplex units and 4 single family units, scattered site. 32 total units built in 1980. Receives ongoing rental assistance from HUD.
4. **Northwood Terrace.** 78 unit apartment complex. 2 three-story and 1 two-story buildings. Built 1969-70 and acquired by LHA in 1973.
5. **Heritage Square.** 47 unit apartment complex. 2 three-story buildings. Built in 1972 and acquired by LHA in 1975.
6. **Mahoney Manor.** 120 unit, eight story elderly high-rise. Built in 1973. Receives ongoing rental assistance from HUD.
7. **Hall Turnkeys.** 23 single family, scattered site units of Turnkey Public Housing. CFP funded. Built in 1973.
8. **Hansen Turnkeys.** 48 single family, scattered site units of Turnkey Public Housing. CFP funded. Built in 1973.
9. **Larson Turnkeys.** 24 single family, scattered site units of Turnkey Public Housing. CFP funded. Built in 1973.
10. **Pederson Turnkeys.** 24 single family, scattered site units of Turnkey Public Housing. CFP funded. Built in 1973.
11. **P30.** 30 duplex units in 15 buildings of scattered site Public Housing new construction. CFP funded. Built in 1981.
12. **A12.** 12 single family, scattered site units of acquisition Public Housing. CFP funded. Acquired by LHA in 1988. Various dates of construction.
13. **F39.** 39 scattered site units of acquisition Public Housing. 4 single family and 35 duplex units. All located in the Arnold Heights neighborhood. Former Air Base housing built in 1950's. CFP funded. Acquired in 1994.

14. **Wood Bridge Apartments and Townhomes.** 130 unit apartment complex built in 1997-98 using Low Income Housing Tax Credits. Ninety-six apartments, thirty-four townhomes, clubhouse and maintenance/laundry facility located in 20 buildings plus 7 multi-garage structures with a total of 48 single car garages.
15. **Crossroads House.** 58 unit elderly high-rise, seven stories. First floor is commercial office space, Floors 2-7 are apartments. Tax Credit Program. Rehabilitated in 1994. Acquired by LHA in 1998.
16. **Lynn Creek.** 16 unit apartment complex in two eight-plex buildings. Built in 1996 and 1997. Acquired by LHA in 2000.
17. **Summer Hill Apartments & Townhomes.** 136 Total units. 40 townhome units in 10 buildings built in 2001 with Low Income Housing Tax Credits. 96 apartments in 12 buildings, plus a clubhouse and 5 garage structures with a total of 28 single car garages that were built in 2003.
18. **Prairie Crossing Apartments & Townhomes.** 76 total units built in 2007-08 with Low Income Housing Tax Credits. The development consists of 20 townhomes in 5 buildings, 56 apartments in 7 buildings, 18 garages in 3 buildings, a clubhouse and a maintenance building.
19. **Sunny Ridge Townhomes.** 28 total townhome units built in 1997 with Low Income Housing Tax Credits. Acquired by LHA in 2016. The development consists of 28 townhomes in 7 buildings, and a leasing office/clubhouse building.
20. **Emerald View Apartments & Townhomes.** 64 total units built in 2023-2024 with Low Income Housing Tax Credits. The development consists of 8 townhomes in 2 buildings, 56 apartments in 7 buildings, a leasing office/clubhouse building, a maintenance building, and 4 multi-garage structures with a total of 15 single car garages.

Administrative Buildings.

21. **Family Resource Center.** A one-story building with 6,144 square feet built by LHA in 1995. Located in the Arnold Heights neighborhood, the FRC contains a daycare, office space and meeting space.
22. **Main Administrative Building.** A two-story building built in 1976 with an addition added in 2001. It has 19,454 square feet. It serves as the main office building for LHA.
23. **Maintenance Shop.** A 12,960 square foot maintenance shop and office building; a 8,448 square foot vehicle storage building; and a 2,400 square foot 3-bay storage garage.

B. Services Required:

1. Inspect and evaluate the properties and identify the immediate, critical physical needs - repairs, replacements and significant maintenance items which should be done immediately. The contractor may conduct inspections of a sampling of units. LHA expects any sampling to be structured and proportionate to different site conditions and unit types. LHA expects that nearly all needed repairs will be observed and identified.

2. Inspect and evaluate the properties and identify the physical needs over the next 20 years. Determine what needs to be done to ensure the long-term viability of each project and preserve the properties in good repair. This will include analyzing the remaining useful life of all major components based on industry standards and property specific conditions.
3. Evaluate and recommend improvements that would add value to the property through improved curb appeal, more marketable amenities, operating efficiency, reduced operating costs, energy efficiency, or other improvements.
4. Determine cost of all proposed work items in present dollar values. LHA expects the final cost estimates of repairs to be as accurate as practical in present dollar values. Present value costs should then be adjusted by an inflation factor for work to be performed in later years.
5. Compare projected expenditures to available resources within each development, including cash flow and reserves as provided by LHA. Prepare a replacement reserve schedule, including an estimate of the initial and annual deposits, accounting for inflation and based on a 20-year term.
6. Based on the information gathered for items 1 through 5, prioritize work items and develop a 20-year strategic plan for addressing the needs of each development within the financial constraints of each development. The plan must include spreadsheets and narratives describing the work to be done, presenting estimated costs, and describing the rationale for the priorities and recommendations given. The plan must include an annual capital expenditure budget and the annual level of reserve deposit necessary to meet the long-term capital needs of each development. LHA has existing 20-year plans which were prepared in 2017 for developments 1-18, and 21-23 listed above. These plans may be used for reference by the contractor.
7. For the HUD Public Housing Developments (#7-13 in Part A above), the contractor must conduct the assessment in accordance with HUD guidance for the Green Physical Needs Assessment (GPNA) Tool and the Physical Needs Assessment and Energy Audit Requirements as published in 24 CFR Part 905. In addition to the development level reports the final GPNA level reports must be rolled into two AMP level reports that can be used for completing the GPNA Tool and CFP planning.
 - Amp 2 - Hall, Hansen, Larson, Pederson, P30 (#7-11 in Part A above);
 - Amp 3 - A12 & F39 (#12-13 in Part A above).

C. Target Work Deadlines:

1. A preliminary report for all developments to be completed by June 1, 2026 for LHA review and comment.
2. A final report for all developments must be completed by September 1, 2026.

D. Proposal Requirements:

1. Describe experience of the firm in conducting on-site physical needs assessments and long-term capital needs assessments of rental property.
 - a. Describe experience and specify years of experience of firm conducting on-site physical needs assessments of rental property.

- b. Describe experience and specify years of experience of the firm conducting long term capital needs assessments and producing 20 year plans.
 - c. Provide project list for assessments completed. Specify number and types of properties assessed by company.
 - d. Provide at least three references from list of projects above.
- 2. Describe experience with affordable/low-income housing projects. Describe specific experience with Public Housing and other HUD programs. Specify experience in preparing Comprehensive Needs Assessments/Physical Needs Assessments for HUD insured or public housing properties, experience and knowledge conducting HUD's Uniform Physical Condition Standards (UPCS) or National Standards for the Physical Inspection of Real Estate (NSPIRE) inspections, and experience and knowledge completing HUD's Green Physical Needs Assessment and Energy Audit.
- 3. Describe experience and background of principal staff members of the company. Identify all personnel, as well as any sub-contractors, to be assigned to this project. Describe experience of the key personnel in conducting on-site physical needs assessments and long-term capital needs assessments of rental property. Demonstrate how the skills, knowledge and experience of those persons relate to the work to be undertaken. Provide resumes for all personnel identified to work on this project.
- 4. Provide a plan describing your overall approach and methodology to completing this project. At a minimum include the following:
 - a. Describe your system/protocol for conducting needs assessments. Provide the proposed inspection forms and formats to be used.
 - b. Specify any proposed sampling method for inspecting dwelling units at each of the properties.
 - c. Describe your methodology for determining the long-term needs, including the standards you use to determine the remaining useful life of major systems and components.
 - d. Describe your methodology for estimating the costs of work to be done. Include your methodology for determining inflation factors. Provide evidence of accuracy of cost estimates from previous projects of similar scope.
 - e. Provide a proposed timetable for completing major tasks. Specify dates. Specify amount of time to be spent on-site for each development.
 - f. Specify the format and information to be provided in LHA's plans. Provide a sample of a completed capital needs assessment and plan prepared by your company. Describe the differences and similarities between the sample plan and your proposal for LHA's plans. In addition to paper versions, LHA would like the plans in an electronic version for future updating. Describe computer format/program in which plan would be generated.
- 5. Price. Provide proposed fees to complete the project. Provide breakdown of fees for each of the developments along with a total fee cost. Explain the basis for establishing the fees. Fees

should include cost to provide 10 copies of each plan to LHA, and an electronic PDF version of each report.

6. Please attach a one page index directing the reviewers to the specific page in your proposal where each requirement in Section D (1-5) has been addressed.

E. Evaluation Factors

You must demonstrate in your proposal your understanding of the requirements set forth in this solicitation. You are advised that a proposal may not merely offer to provide services in accordance with this solicitation, but must describe a definitive approach.

- 20% Experience of Company conducting long term capital planning & experience and expertise of key personnel to be assigned to this project
- 20% Experience of Company with HUD affordable housing programs and GPNA requirements
- 20% Price
- 40% Proposed approach to LHA project and quality of sample plan.

LHA will award to the responsive and responsible offeror whose offer conforms to the solicitation and is most advantageous to LHA, price and other factors considered. The proposed price must be considered reasonable and must reflect the proposed approach. LHA reserves the right to reject proposals if it deems the price to be unreasonable. LHA reserves the right to award to other than the lowest priced offer. LHA reserves the right to reject all offers and to make no award if it is in the best interest of the LHA to do so.

All proposals shall remain in effect and may not be modified, withdrawn or cancelled for a period of 60 calendar days after the scheduled closing time for the receipt of bids.

The Lincoln Housing Authority reserves the right to reject any or all bids, and to waive any informalities in any bid received.