

Questions and Answers as of January 8, 2024, CHFA 268-Request for Proposals (“RFP”) for Property Management Services:

Question: Is there an incumbent? If so, please provide name?

Answer: RM Bradley has been providing the services since November 2023.

Question: Please provide the following information:

- ***2023 YE Expense Statement (Actuals) or 2023 Budget***
 - Please see attached.
- ***2024 Budget***
 - Please see attached.
- ***Floorplans***
 - Please see attached.
- ***List of Mechanical Equipment***
 - Please see attached
- ***Current contractors/contractors by service***
 - Please see list of building contractors which may not necessarily be the complete list. Depending on the services required, CHFA may request other quotes and/or utilize a state contract.
 - CHFA enters into approximately 300 contracts a year. If you are interested in further details about a CHFA contract and/or contractor, please contact Amy Stoto at amy.stoto@chfa.org.
- ***Any major projects (last 5 years)***
 - There have been no major projects over the last five years.
- ***Proposed major projects (next 5 years)***
 - CHFA anticipates replacing the HVAC units, the boiler, the cooling units in the server room and the building management system in the near future.
 - CHFA is in the process of finalizing a capital improvement plan. However, CHFA does not have specific plans at this time for other major projects.
- ***Claims for the past 3 three years***
 - CHFA has had no claims related to the building for the past three years.

Question: Please provide a list of those who attended the walkthrough on January 3, including the companies they represented.

Answer: Please see attached list.

Question: Please provide a copy of the current management agreement.

Answer: Interested firms are encouraged to submit fees based on their own judgment and experience. If you would like a copy of the current contract with RM Bradley, please contact Amy Stoto at amy.stoto@chfa.org.

Question: Please provide year-end financial statements for the past three years.

Answer: CHFA's financial statements can be found on its website:

<https://www.chfa.org/about-us/bonds-reports-disclosures/>

Question: Please provide a list of any tools and equipment owned by CHFA and located at the building.

Answer: CHFA does not have an inventory of tools and equipment. Any tools or equipment needed for minor repairs which CHFA does not own can be purchased by CHFA.

Question: Please provide management reports from the last 12 months.

Answer: CHFA has been utilizing the services of a management company for approximately two months. Reports for November and December are attached.

Question: Will the property manager be responsible for any accounting services such as bill paying, bookkeeping, financial statements, etc.?

Answer: The property manager will not be responsible for any accounting, bill paying, bookkeeping or financial statements.

Question: Will the maintenance contracts with various building vendors be with the property manager or CHFA?

Answer: The maintenance contracts will be between CHFA and the building vendors.

Question: When will the contract award be made and when will the new contract term commence?

Answer: CHFA anticipates deciding and entering a contract by March 1, 2024.

Question: What is the term of the contract?

Answer: The contract term will be up to three years.

Question: Does this contract fall under Connecticut standard wage with respect to the requested Maintenance staff? If so is there a required classification that all bidders should supply such as "General Maintenance Worker?"

Answer: The standard wage requirements do not apply.

Question: What holidays are observed by CHFA, and which holidays will normal maintenance services not be required?

Answer: CHFA observes the following holidays:

New Year's Day, Martin Luther King Day, President's Day, Good Friday, Memorial Day, Juneteenth, Independence Day, Labor Day, Indigenous Peoples' Day, Veterans' Day, Thanksgiving, Friday after Thanksgiving, and Christmas.

Maintenance services should follow holiday schedule for awardee.

Question: How is the purchase of maintenance supplies handled?

Answer: CHFA handles all purchases.

Question: How is the property currently staffed?

Answer: CHFA staff is working a hybrid schedule.

Question: Is there a maintenance office or shop on site for use by the general maintainer?

Answer: Yes, there is an office/space at CHFA available for the general maintainer.

Question: Is a real estate broker license required?

Answer: No.

Attachments to Questions/Answers for CHFA 268: RFP for Property Manager:

- 1) Attendance for January 3, 2024 Walkthrough
- 2) List of Building Contractors
- 3) Floor Plans
- 4) List of Mechanical Equipment
- 5) Summary of Management Reports for November/December 2023
- 6) 2023 Operating Budget and Projected Actual and 2024 Proposed Operating Budget

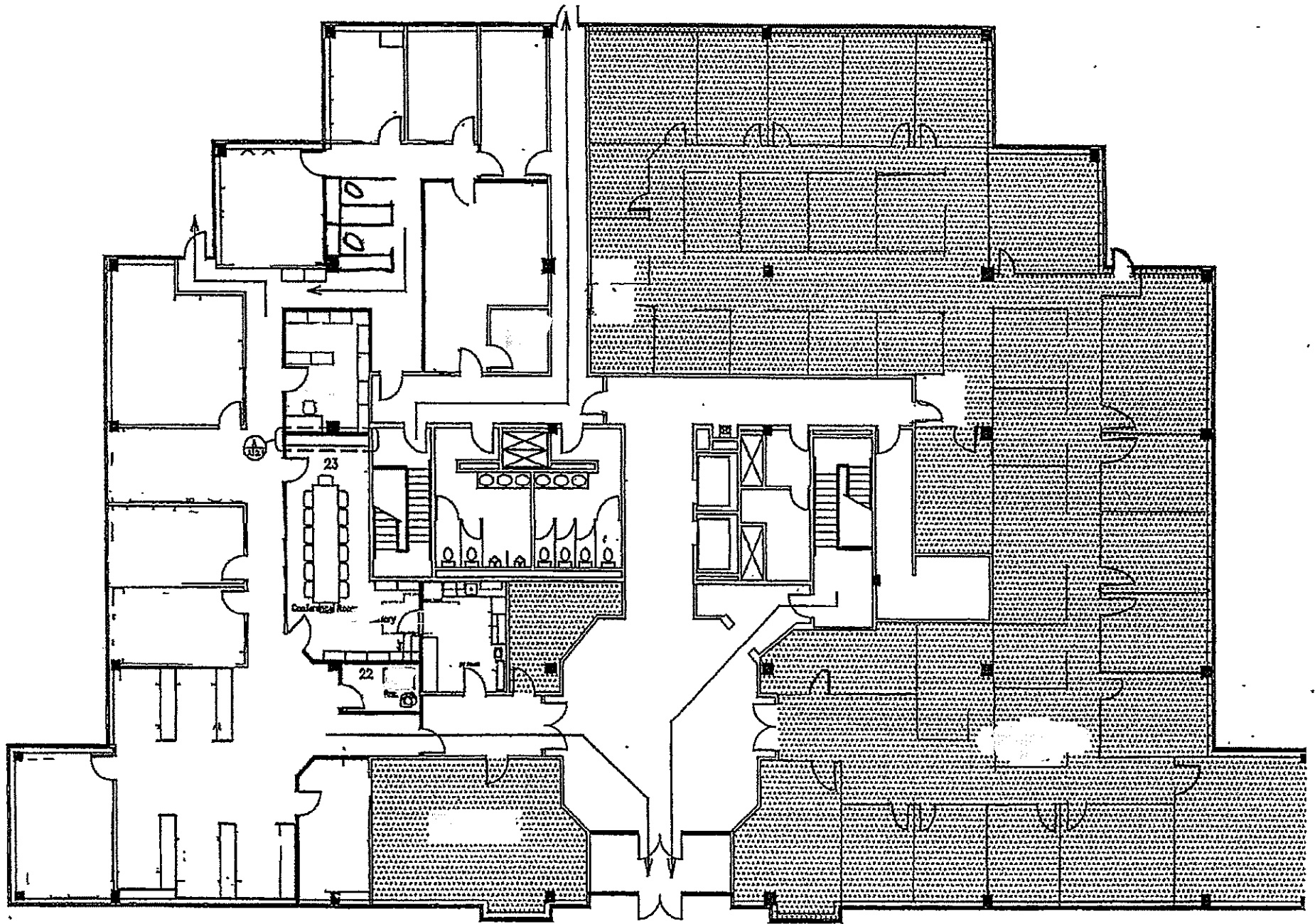
Property Management Services

Site Visit: January 3, 2024, 10:00 a.m.

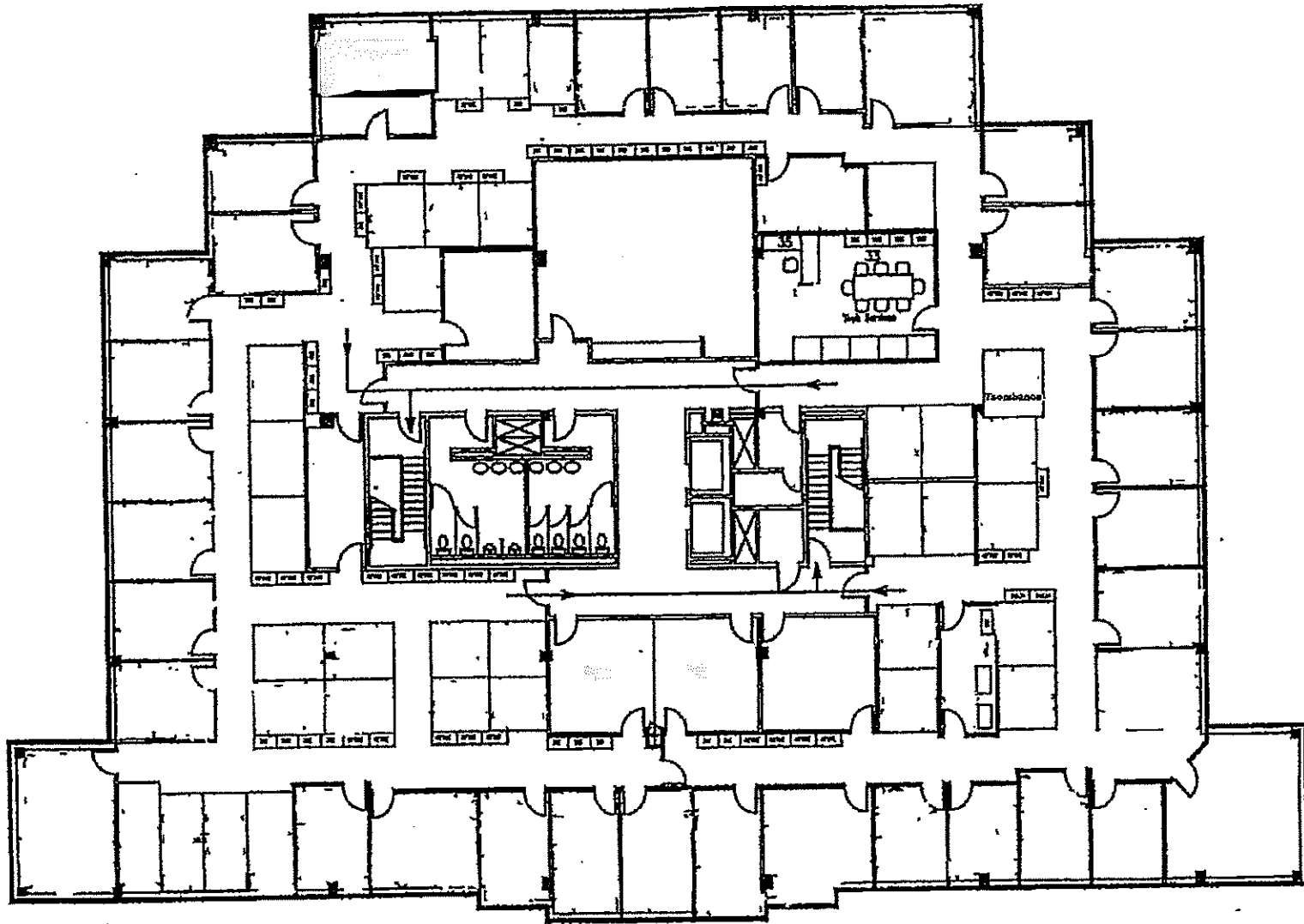
Company Name	Individual Name
ABM Industries	Pierre Cabrera and Nae Maclaud
Appleton Corporation	Matt Flink and Eileen Albano
Fusco Management Company	Teri Byrne and Keon Dickerson
Konover Management	Elizabeth Judd and Brian Nicknair
RM Bradley	Jeff Davis
BCE Solutions	John Perry

Building Contractors

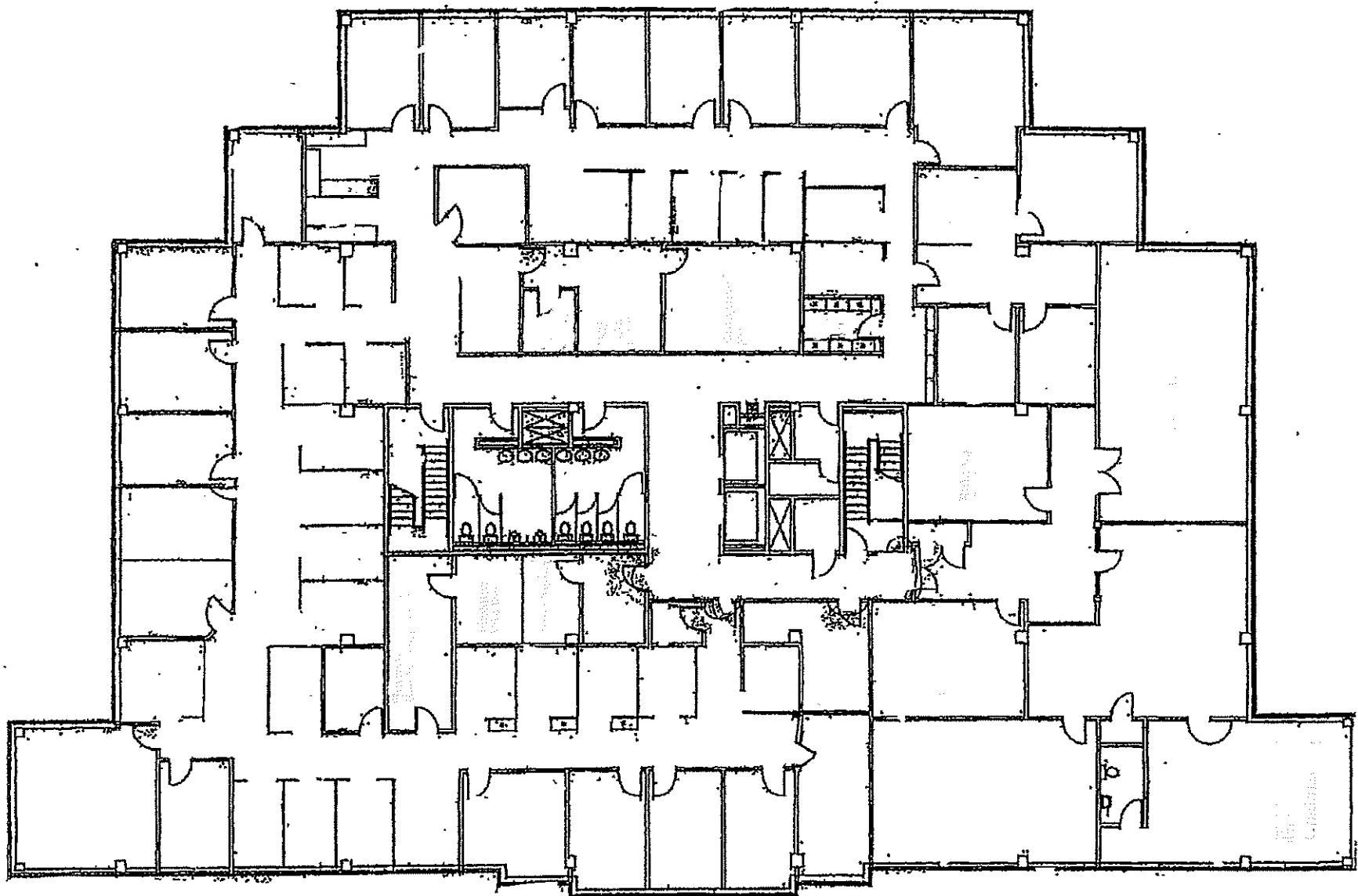
Service	Contractor
Carpet Cleaning	Felix Martinez, Jr. d/b/a Ameri-Best Carpet Cleaning
Electrical	J.H. LaPierre, Jr. & Son, LLC
Electrical	Newington Eletric Co., Inc.
Elevator Maintenance	Kone, Inc.
HVAC	Action Air Systems, Inc.
Janitorial Services	CT Community Nonprofit Alliance, Inc.
Landscaping	Primary Landscaping, LLC
Life Safety Services	Tyco Fire & Secruity Management Inc. dba Johnson Controls
Pest Control	Total Pest Control, LLC
Property Management	RM Bradley Corporation
Rug Maintenance	MagnaKleen Services LLC
Security	Sonitrol Security System of Hartford, Inc.
Shredding	Infoshred
Snow Maintenance	B&W Paving & Landscaping, LLC
Trash & Recycling	Paine's Inc.



Floor 1



Floor 2



Floor 3

Exhibit A

**CONNECTICUT HOUSING FINANCE AUTHORITY
HVAC EQUIPMENT INVENTORY**

QTY	SYSTEM COMPONENTS	MANUFACTURER	MODEL	RATING	LOCATION
2	PACKAGE ROOFTOP HVAC UNITS	TRANE	SXHC-750	75 TONS	ROOF
1	HOT WATER BOILER	H.B.SMITH	28 MILLS		PENTHOUSE
5	EXHAUST FANS	LOREN COOK			ROOF/ELE.MACHINE ROOM
1	AIR COMPRESSOR	QUINCY	QR03008D00 026		PENTHOUSE
1	AIR DRYER	SPEEDO			PENTHOUSE
2	HUMIDIFIERS	DRI STREAM	VPC-8-8		RTU'S
1	WATER HEATER	A.O. SMITH	CYCLONE100		PENTHOUSE
2	HOT WATER PUMPS	B&G	1510		PENTHOUSE
2	HOT WATER UNIT HEATERS	TRANE			1 ST FLOOR
91	VAV BOXES	TRANE			ALL FLOORS
3	DUCTLESS SPLIT A/C SYSTEM	SANYO		1.5 TONS	1 ST & 3 RD FLOOR
1	DDC CONTROL SYSTEM	JOHNSON	COMPANION		3 RD FLOOR, ELEC. CLOSET
3	CHANENGER 3000 CONTROL SYSTEM	LIEBERT	BU067A-CAEI	5 TONS	3 RD FLOOR COMP. ROOM
3	95 F AMBIENT FAN SPEED CONTROL CONDENSER	LIEBERT	DCSF083-9	208/230 VOLTAGE 1 PHASE 60HZ	ROOF

BUILDING COMMENTARY

December

Completed inspection of the building with emphasis on shutoffs for all water locations. We worked with the plumber who services the building and found that the main shut off to the building does not work. Some time in the past a secondary shut off was added next to the restrooms 1st floor. We discovered with the plumber that all the individual restroom shut offs do not function and need to be replaced. We recommend doing this on the next state holiday so that the building occupants will not be impacted. At some point the main original shut off for the building should be replaced as well.

For the month we had our full maintenance staffing 5 hours per day. We have included at no charge an extra hour per day for our maintenance technician to be on site . Our onsite technician completed a number of work requests and Preventative maintenance for the month as follows:

Hung Calendar for I Diaz

Replace water filters third floor cooler

More and modify cubicle and credenza M Lipila

Remove nails patch and paint office third floor Kelly long

Mount key box third floor janitors closet

Remove chairs for pick up from brown conf room

Inspected all Emergency lights found 3 of the exit sign type with batteries and notified the client. In addition we inspected the ceiling flush mounted emergency lights and found the 30 not working . We assume the batteries on these units are bad and have asked to order replacements.

Exterior lighting checked in the parking lot and found a couple of lights out i=on the poles but over all good lighting .

Restroom inspection completed and found numerous issues to include changing the traps under sinks.

Door inspection: all interior common doors were inspected and one door closer was replace . We will need keys for the exterior door alarms to complete and inspection of those.

Cleaned and organized all electrical rooms, cleaning closets and sprinkler room.

November 2023

Toured building and noted warm areas in the offices and several stained tiles near VAVs on all floors. Returned to the building with Todd our HVAC technician and

accessed the roof and found one of the two RTUs that serve the building to be off. Our understanding is that each unit serves half of the building. With the unit off, perhaps for a few days, there was no air flow in the front half of the building. This would explain the warm areas that we found such as the front conference room on the first floor. The interface on the RTU indicated there were multiple alarms on the unit one of which was space pressure. Reset unit and returned it to operation.

Recommended having the HVAC service contractor inspect the unit and replace the sensors if required. In speaking with the front desk attendant she indicated that the lack of air flow was a going problem and the maintenance person would go to the roof when this happened. Once the unit was reset air flow was restored.

We inspected the penthouse area and found it in need of some housekeeping. Also noted that the boiler appears to have the original burner. The outer skin of the boiler looks newer with one rear section showing signs of past distress.

It appears that perhaps two exhaust fans were not running however these may have been interlocked with the RTU that was off on alarm. We will have to check the fans again while everything is up and running.

11/09 late in the day received an email of a leak in an office on the first floor. Spoke with Shelly and made arrangements to return the next day with our HVAC tech Todd.

11/10 Returned to the building with our HVAC specialist and met Maura to inspect the area with the leak. Found that the VAV in the office had a small leak. We secured the leak so that no damage would occur and recommended replacing the failed actuator and valve. When the boiler was turned on and the hot water used to heat the building is circulated to the VAVs small leaks appear seasonally. Judging by the staining it appears that some of these areas leaked previously.

We were able to access the EMS computer. There are no graphics that we were able to see as the program is an older JCI control program. There does not appear to be an occupancy schedule in the program, meaning that the system runs 24 /7 rather than having a occupied schedule with night setbacks. Further evaluation will be needed to see what the system capabilities are. I would like to suggest having the controls company come in and see if there are any alarm capabilities so that critical alarms could be sent to maintenance.

As a side note I recommended that it should be verified with the landscaper that the irrigations system had been properly winterized to avoid any freeze concern.

11/14 returned to the building and received 2 access cards and a master key.

Inspected building with Shelly and looked for potential stained tiles from Vav leaks.

Identified a number of them on all floors with the majority being on the 3rd floor.

Also noted some stained tiles near windows that might indicate some leakage.

11/16 Received a call from Shelly at 4:45 that the exterior doors in the front of the building were not closing and there were security concerns. As the building was empty by 5pm and the cleaners would be onsite my recommendation was to have the cleaners make sure they secured the doors when leaving and emptying trash. My thought was that the RTU that serves the front was causing the over pressuring because of the bad sensors. I spoke with Todd our HVAC technician and he concurred. I scheduled Todd to stop by the next morning and check the system.

11/17 8:00am Met Todd at building. Checked building and found that the air seemed normal. Checked units and they were performing as intended. Todd surmised that with the warm temperatures the unit with the bad sensor was over pressurizing when using outside air to cool. Advised Shelly of what we found and recommended follow up call to the HVAC contractor on when the repairs will be.

11/27 met with Eduardo Sosa our new maintenance tech at the building and completed a tour of the building.

Connecticut Housing Finance Authority

Proposed 2024 Operating Budget

Summary of CHFA Permanent Full-Time Positions

2023 Approved Budget - 148

2024 Proposed Budget - 148

EXPENDITURE CATEGORY	APPROVED 2023 BUDGET	2023 PROJECTED ACTUAL	2024 PROPOSED BUDGET	VARIANCE from 2023 BUDGET to 2024 BUDGET		
				\$'S	%	
PERSONNEL-						
SALARIES - CHFA	15,977,010	14,658,101	17,014,127	1,037,117	6.5%	
SALARIES & BENEFITS - DOH	600,921	593,189	620,779	19,858	3.3%	
FRINGE BENEFITS	15,654,315	14,436,222	15,207,917	(446,398)	-2.9%	
TEMPORARY STAFF	109,000	105,920	55,000	(54,000)	-49.5%	
DEVELOPMENT & TRAINING (including related travel)	326,400	279,764	366,825	40,425	12.4%	
TOTAL PERSONNEL-	32,667,646	30,073,195	33,264,648	597,001	1.8%	
PROFESSIONAL SERVICES-						
LEGAL FEES & SETTLEMENT EXPENSES	350,500	279,050	532,500	182,000	51.9%	
LIHTC COMPLIANCE MONITORING	252,000	252,000	250,000	(2,000)	-0.8%	
HOMEOWNERSHIP COUNSELING FEES	700,000	696,403	700,000	-	0.0%	
OTHER PROFESSIONAL FEES	628,200	557,918	696,500	68,300	10.9%	
AUDIT FEES	107,000	107,000	110,400	3,400	3.2%	
TOTAL PROFESSIONAL SERVICES-	2,037,700	1,892,371	2,289,400	251,700	12.4%	
FACILITY & INFORMATION SYSTEMS-						
BUILDING MAINTENANCE/UTILITIES	693,683	617,021	693,683	-	0.0%	
INFORMATION SYSTEMS	1,421,500	1,309,593	1,380,300	(41,200)	-2.9%	
EQUIPMENT RENTAL	56,615	34,261	56,615	-	0.0%	
TOTAL FACILITY & INFO SYSTEMS-	2,171,798	1,960,876	2,130,598	(41,200)	-1.9%	
OFFICE EXPENSES-						
OFFICE SUPPLIES	62,000	44,422	62,000	-	0.0%	
POSTAGE/EXPRESS MAILINGS	38,790	21,822	35,000	(3,790)	-9.8%	
TELEPHONE	100,000	92,908	106,000	6,000	6.0%	
PRINTING	13,000	4,128	13,000	-	0.0%	
ARCHIVAL SERVICES	30,713	20,473	30,713	-	0.0%	
OTHER MISCELLANEOUS	11,500	4,279	22,000	10,500	91.3%	
TOTAL OFFICE EXPENSES-	256,003	188,031	268,713	12,710	5.0%	
OTHER EXPENSES-						
INSURANCE	376,401	273,542	322,904	(53,497)	-14.2%	
ADVERTISING/MARKETING/OUTREACH	378,000	278,480	466,000	88,000	23.3%	
MILEAGE REIMBURSEMENT	25,000	12,339	22,000	(3,000)	-12.0%	
DUES/SUBSCRIPTIONS SERVICES	189,721	163,704	170,762	(18,959)	-10.0%	
SGL FORECLOSURE/REO DISPOSITION COSTS	1,000,000	290,624	1,000,000	-	0.0%	
TOTAL OTHER EXPENSES-	1,969,122	1,018,688	1,981,666	12,544	0.6%	
	SUBTOTAL	39,102,270	35,133,161	39,935,025	832,755	2.1%
BOND RELATED EXPENSES-						
TRUSTEE FEES	599,203	513,808	539,498	(59,705)	-10.0%	
VARIABLE RATE BOND FEES	4,274,998	3,941,435	4,067,345	(207,652)	-4.9%	
BOND ADMIN COSTS	531,689	394,837	518,279	(13,410)	-2.5%	
TOTAL BOND RELATED EXPENSES-	5,405,890	4,850,080	5,125,122	(280,767)	-5.2%	
TOTAL OPERATING BUDGET-	44,508,159	39,983,241	45,060,148	551,988	1.2%	
LESS REIMBURSABLE EMAP PROGRAM EXPENSES ⁽¹⁾	(25,000)	(43,880)	(50,000)	25,000	-100.0%	
LESS REIMBURSABLE DOH & BENEFITS ⁽²⁾	(300,000)	(300,000)	(300,000)	-	0.0%	
NET OPERATING BUDGET	44,183,159	39,639,362	44,710,148	526,988	1.2%	

Connecticut Housing Finance Authority

Proposed 2024 Operating Budget

Summary of CHFA Permanent Full-Time Positions

2023 Approved Budget - 148

2024 Proposed Budget - 148

EXPENDITURE CATEGORY	APPROVED 2023 BUDGET	2023 PROJECTED ACTUAL	2024 PROPOSED BUDGET	VARIANCE from 2023 BUDGET to 2024 BUDGET	
				\$'S	%
CAPITAL BUDGET					
BUILDING MAINTENANCE/UTILITIES	300,000	N/A	1,500,000	1,200,000	400.0%
INFORMATION SYSTEMS	625,000	N/A	1,500,000	875,000	140.0%
TOTAL CAPITAL BUDGET	925,000	N/A	3,000,000	2,075,000	224.3%
TOTAL OPERATING & CAPITAL BUDGET	45,108,159	39,639,362	47,710,148	2,601,988	5.8%

⁽¹⁾ Expenses related to the state funded Emergency Mortgage Assistance Payment (EMAP) program are partially reimbursed from program funds at a rate of 10% of total loan advances.

⁽²⁾ Expenses related to 3 DOH CAN employees currently on CHFA's payroll are partially reimbursed by DOH.

FOR REPORTING ONLY

CAPITAL BUDGET	BEGINNING BALANCE PREVIOUSLY APPROVED	CURRENT YEAR EXPENDITURE	FUTURE EXPENDITURE	NEW FUNDING	REMAINING FUNDS
	BUILDING MAINTENANCE/UTILITIES	1,185,641	-	1,185,641	1,500,000
INFORMATION SYSTEMS	926,556	926,556	-	1,500,000	1,500,000
TOTAL CAPITAL BUDGET	2,112,197	926,556	1,185,641	3,000,000	4,185,641