



HOUSE DOCTOR ORIENTATION

SEPTEMBER 6, 2024

Agenda

Welcome by Fatima Razzaq, Bureau Director

Navigating the House Doctor Program

- Designer Contract, Planning and Design – Shan Li
- Project Management – Avalon McClaren
- Bidding and Construction Procurement – David McClave
- Construction Management – Tom Mulvey
- Sustainability – Greg Abbe
- Data and Systems – Stacey Reiling
- Documents and Guidelines

Closing/Q & A

Welcome, House Doctors! – Fatima Razzaq

EOHLC Overview

- EOHLC's Division of Public Housing is split into two main Bureaus: Housing Management and Housing Development and Construction
- The Bureau of Housing Development and Construction is made up of the following units, which work with the House Doctors to implement capital improvement projects at the LHAs:
 - Project Management
 - Architects and Engineers
 - Construction Advisors

Regional Capital Assistance Teams (RCATs)

- LHAs with under 500 state-aided public housing units may be a part of the RCAT program
- RCATs deploy an additional team to assist LHAs with implementing their capital projects under \$100,000
- There are 3 RCAT teams that each cover their own geographic area

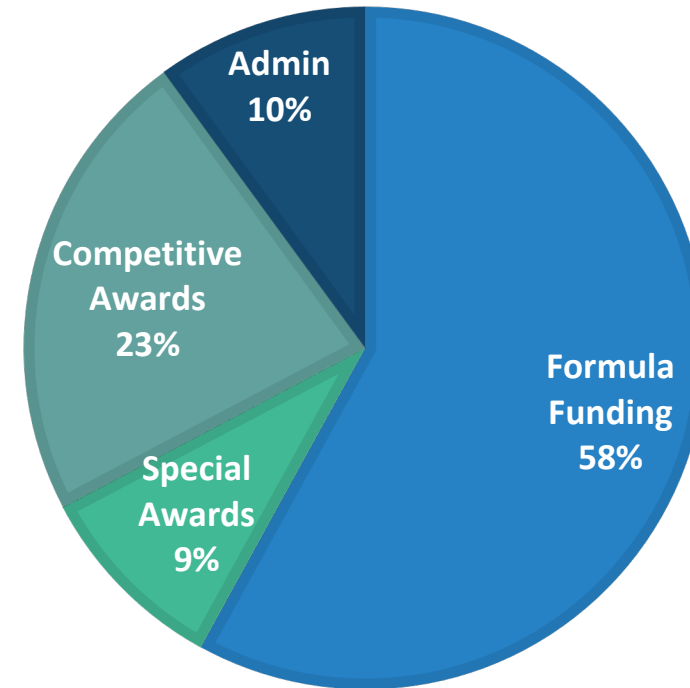
Project Pipeline and Funding

PIPELINE

- We have a large pipeline of about 3,500 active projects statewide at any given time.
- About half of those will require us to work with a House Doctor for design
 - These projects represent estimated construction values between \$50,000-multi-millions

FUNDING: ~\$155M Annually

■ Formula Funding ■ Special Awards ■ Competitive Awards ■ Admin





NAVIGATING THE HOUSE DOCTOR PROGRAM

Project Planning and Design

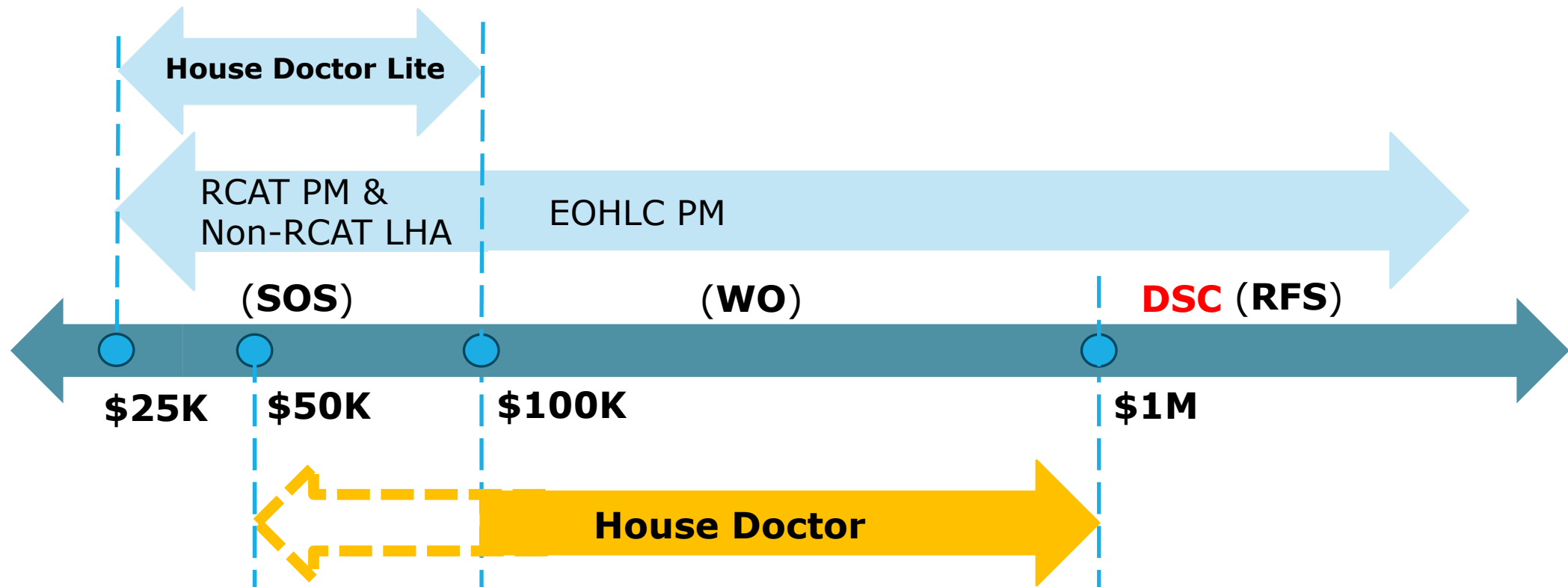
Legislated Developments of the Commonwealth

- 200 Family/
- 667 Elderly & Special Needs
- 705 Family/
- 689 Special Needs

The State-aided public housing portfolio: 80,000 residents in 1,430 developments, 45,300 apartments.



Working on LHA Projects



AESU Team

Architecture Engineering Sustainability Unit

Shan Li, Assistant Director, AESU

James McCurdy, Supervising Architect

Juliet Borja, Staff Architect

David Cann, Staff Architect

John Olsen, Staff Architect

William Koetteritz, Supervising Engineer

Marcel Dumitrescu, Staff Sustainability Engineer

Howard Gerber, Staff Electrical Engineer

Ben Oxender, Staff Site Engineer

Frank Bossi, Staff Mechanical Engineer

House Doctor Contract

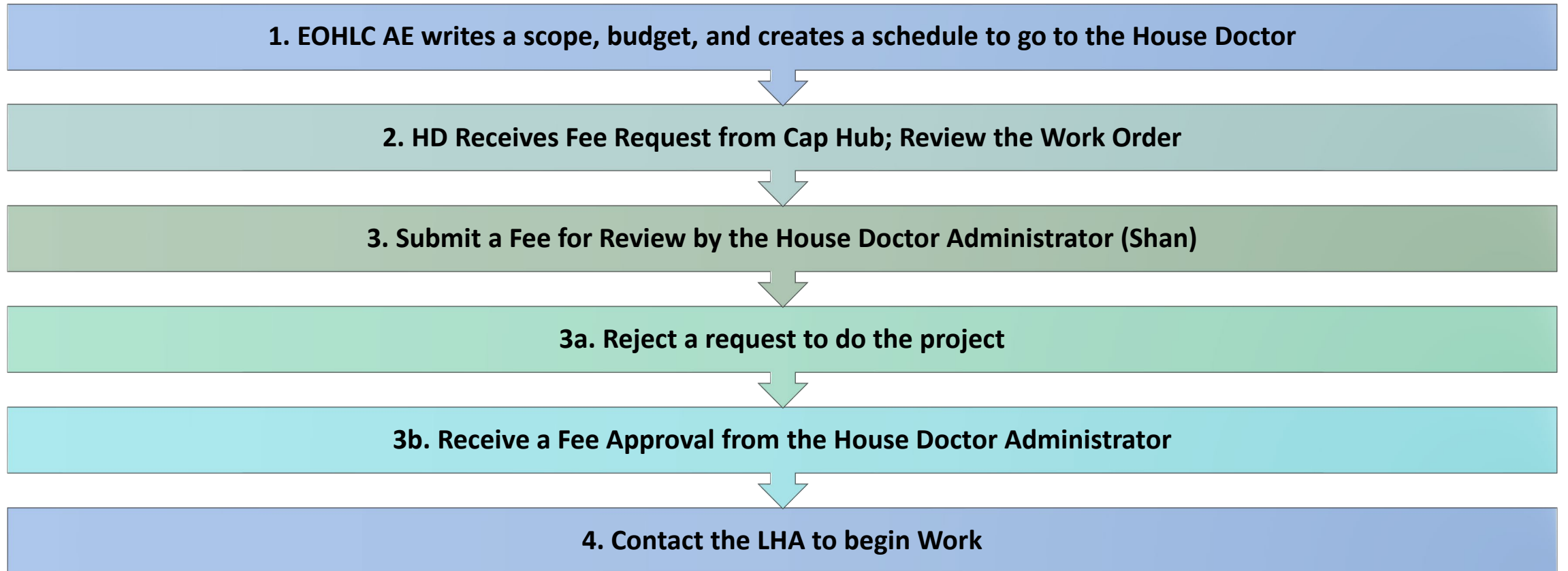
- The RFS 056189- HD2020 with Amendment-1 to Add Design Consultants_ services contract

On the web: [EOHLC \(formerly DHCD\) House Doctor Contract RFS 2024 DHCD HD 2020 w Amend.1](#)

- The WO or SOS for a specific project

The conditions, requirements, and scope of services in the RFS plus the specific project related scope and requirements set forth in a WO or SOS constitute the Designer Contract for a project.

Work Order and Fee Submittal – Planning Phase & Tab



Work Order and Fee Submittal – Planning Phase & Tab

1. The EOHLC AE writes a scope, budget, and creates a schedule to go to the House Doctor.
The factors we consider for selection are:

Geography

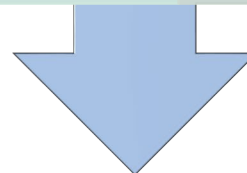
Current
workload

Cumulative workload

Phased Projects

LHA Preference

DHCD staff
selection



2. HD Receives Fee Request from Cap Hub; Review the Work Order

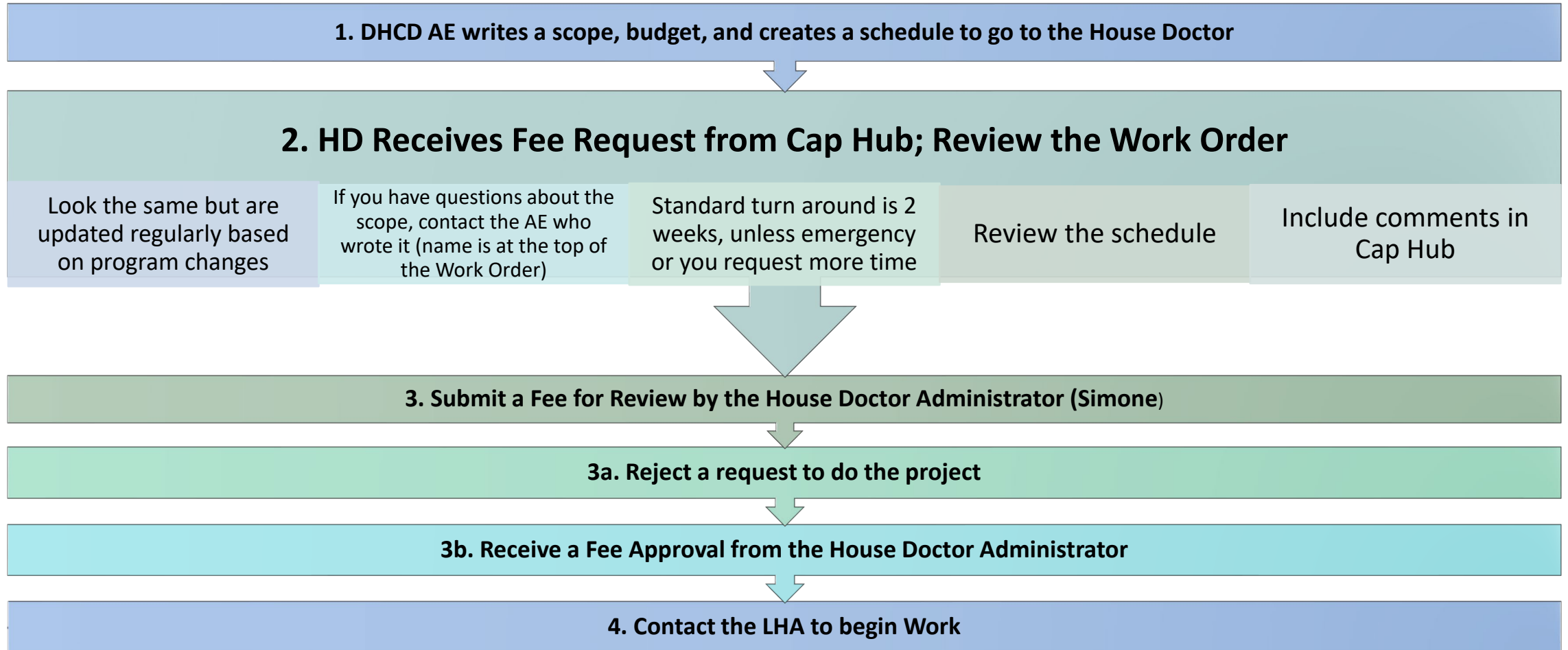
3. Submit a Fee for Review by the House Doctor Administrator (Shan)

3a. Reject a request to do the project

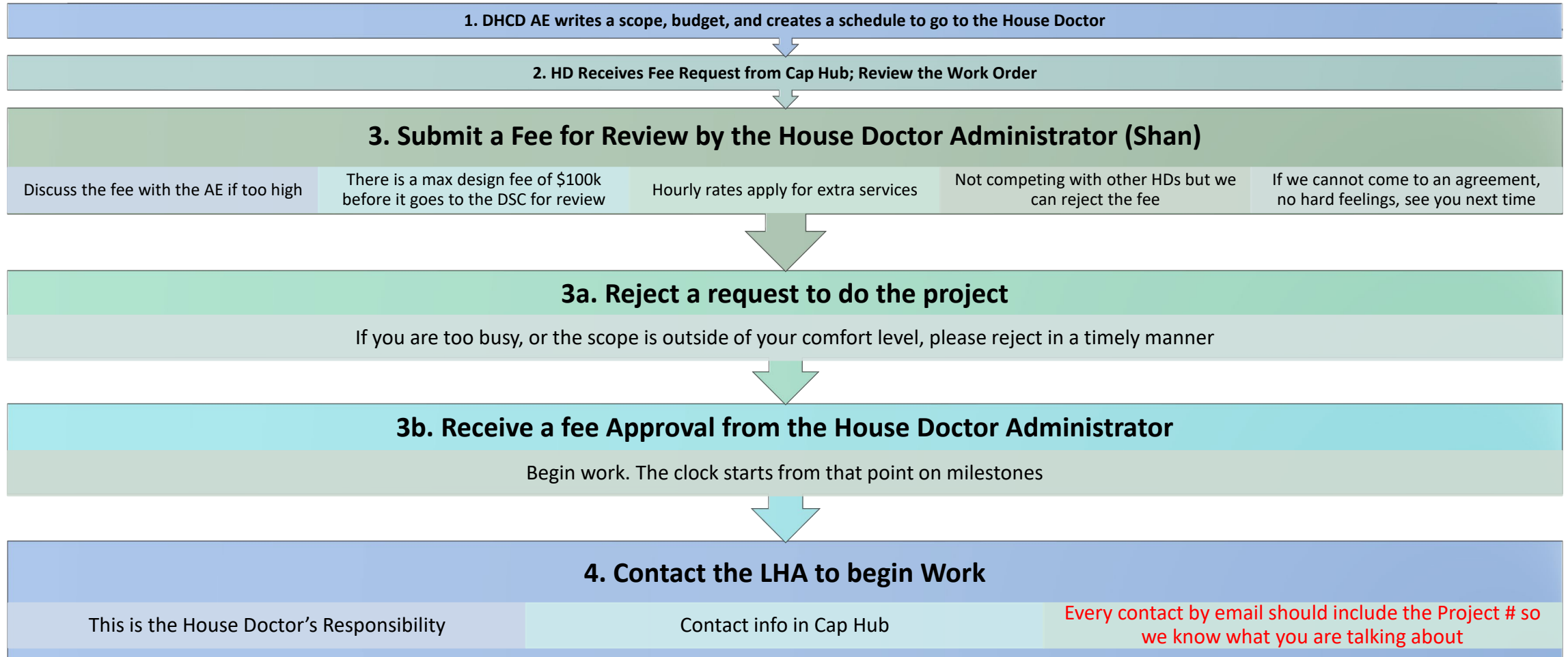
3b. Receive a Fee Approval from the House Doctor Administrator

4. Contact the LHA to begin Work

Work Order and Fee Submittal – Planning Phase & Tab



Work Order and Fee Submittal – Planning Phase & Tab



Design and Review – Design Phase



Contact the LHA to begin work

Walk-thru

Gather Documents

Review the Related Guidelines

Develop Concept/Schematic design

Find existing drawings at our archive with Biddocs or in the back room of the LHA



Submit the Design into Cap Hub **ALWAYS**

Paper copy as needed

If the correct phase is not showing, ask PM to have it fixed

Include a transmittal for both digitally and hard copy so we know that all the parts are included

If you will be late, let the team know so the schedule can be revised



Assigned DHCD AEs will review the documents and provide a review memo

Recommending Approval, Incomplete, or Rejection



Reasons you won't be approved:

The project is over budget and there has not been a suggestion to get to budget

The design is not defined and quantifiable

Missing parts of the submittal, i.e. the estimate

The design does not meet the design guidelines

You are using the incorrect front end



PM will initiate a Phase Approval once the review of the phase are complete

Notice out of Cap Hub

Only after a phase is approved can you bill/invoice for that particular phase



Approval to Bid and you will receive instructions from cap hub on how to proceed

All our bidding is electronic apart from BHA

Bid Docs & Project Dog
Procurement Specialist – Dave McClave will guide your way

Project Management

Project Management Team – Avalon McClaren

- DHCD Project Managers are here to help move the project forward, making sure all parties are on the same page
- Most frequently that means managing the project **schedule, budget, and invoices**
- Helpful hints:
 - Please communicate any changes to the Work Order (changes in scope, schedule or budget) as early in the process as possible
 - All changes to the budget need to be approved by the Housing Authority, DHCD Architect or Engineer, and the Project Manager

Changes to Schedule, Budget, or Scope

- Keep us informed of any changes as soon as they happen.
- Budget changes and schedule changes impact our forecast, so accuracy is critical for our processes.
- Changes in scope that require fee amendments can be submitted in CapHub. When submitting an amendment, include a description and the change and a breakdown of any additional fee.
- We're here to help! Give us a call if you have any questions.

DHCD and RCAT Project Managers

- There are two kinds of Project Managers - RCAT and DHCD
- RCAT PMs handle jobs between \$10K- \$100K
- DHCD PMs handle jobs over \$100K
- For more information about the RCAT program, go to:
<https://www.mass.gov/service-details/regional-capital-assistance-team-rcat-program>

Bidding and Construction Procurement

Bidding and Construction Procurement

- After receiving approval to bid, the Project Manager will assist the Designer and the Housing Authority in placing the various ads in a timely fashion
- The Designer will post the bidding documents on one of our two e-hosting / e-bidding vendor's website
- The Designer will respond to any questions posed by potential bidders
- David McClave will review the bids and determine if the low bidder is "eligible"
- The Housing Authority, with input from the Designer, determines if the lowest eligible bidder is "responsible."
- Once Low Bid Approval is issued, David McClave prepares the construction contract documents and shepherds them to final execution
- The project is now ready for the pre-construction meeting and Notice To Proceed

Construction Management

Construction Tips for New Design Consultants – Tom Mulvey



Always refer to the DHCD Guidelines & Standards.



Be diligent about initial investigative work required in the scope of services.



If there is a question about full access to any area of concern to be reviewed, please contact Construction Advisor



If there are questions about code compliance, check with the local inspector before materials are ordered and work begins.



The director is the "owner", and the comfort, safety and consideration of the tenants must come first.



Post meeting minutes in a timely manner so the team has time to review them prior to the next meeting.



Submittals should be reviewed and returned as quickly as possible to keep the project moving.



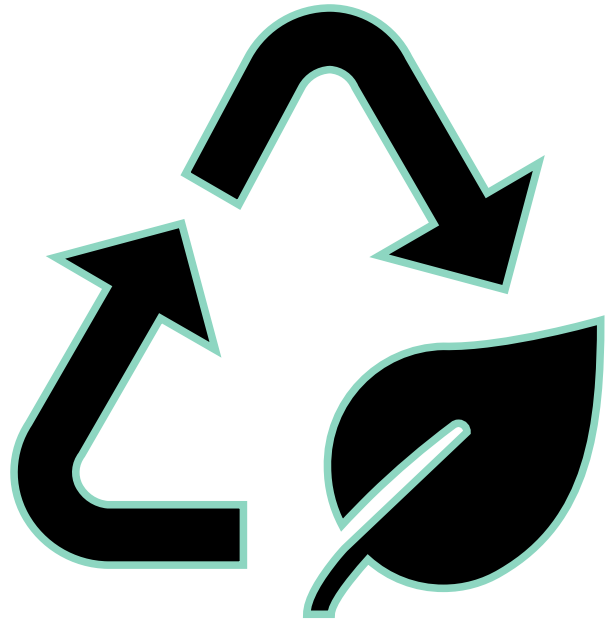
Always include a cover letter with change orders.

This should be written so the director and his or her board can easily understand the need for the change.



Designers should defer to their responsibilities listed in the scope of services.

Site visits should still be made by the designers to review the work.



SUSTAINABILITY AND RESILIENCY

General Overview – Greg Abbe

WHY CARE ABOUT SUSTAINABILITY?

- MA committed to net-zero GHG emissions by 2050
- As a State agency, EOHLC must Lead by Example
- The impacts of climate change are felt disproportionately by vulnerable populations, many of whom live in public housing
- With capital projects occurring all the time, can't afford to miss opportunities

HIGH LEVEL

- Focuses on reducing GHG emissions, increasing resiliency, and improving IAQ
- EOHLC capital funds may not be used to install new fossil fuel-fired equipment, with exceptions

Program Offerings

DECARBONIZATION

- LHA's complete an application for SUST funding
- Eligible projects include, but not limited to:
 - Weatherization (air-sealing/insulation)
 - Weatherstripping of doors
 - Electrification of HVAC
 - LED Lighting & Controls
 - Refrigerators
 - Shade Trees
- Sustainability adders to other projects
 - Replacing a roof = check for insulation & bath fans
 - Kitchen or bath rehab = check for range hood/bath fans
 - Replacing siding = check for insulation

RESILIENCY

- LHAs complete an application for SUST funding
- Developments made more resilient to flooding (rainfall & SLR/SS) and extreme heat
- Many project types
 - When in doubt, ask:
 - "Is this development vulnerable? Can this project help?"

INDOOR AIR QUALITY

- Bath fans and range hoods

Program Offerings

- EOHLC Sustainability Website:

<https://www.mass.gov/service-details/public-housing-sustainability-resilience-and-healthy-building-environments>

- Greg Abbe, Sustainability Program Developer, Gregory.abbe@mass.gov
- Gemma Wilkens, Sustainability Program Coordinator, gemma.wilkens@mass.gov

Data and Systems

Upcoming Training

Date	Time	Link to Register
Monday, September 9th	9 AM to 12 PM	Registration is full for this session
Tuesday, September 10th	9 AM to 12 PM	https://zoom.us/meeting/register/tJcpceigqz8oG9G5_pkmfH9sF9PgDdr-P_qb#/registration

Note: The link to attend will be provided by Zoom via email just after you register

CapHub Access

An automatic email will be send to you from CapHub with the following information:

Username: Email Address

Temporary Password: Dhcdcaphub1

**Note: You will be asked to change the password to a more secure one.*

URL link to CapHub:

<https://caphub.azurewebsites.net/Dashboard>

Add New Design Consultant

E-mail Address/Username *

Password : Dhcdcaphub1

First Name* Last Name*

House Doctor Status
☐ Regular ☐ Lite

MBE/WBE Architect/Engineer Last Brochure Date
MM/DD/YY

☐ Is Eligible

Website

Add New Discipline

Discipline	Remove
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Comment

Company

Add New Design Consultant

Comment

Company

☐ Primary User for Company ☐ Suspend Company From New Projects

Company Name FEIN #

Changing Company Name ☐

Name	Date	FEIN #	Date
No name change history available.		No FEIN # history available.	

Company Address Line 1

Company Address Line 2

City State Postal Code

Company Phone Number

CapHub Technical Support

Technical Support Requests:

- Please email technical support requests for CapHub to the main contacts listed.
 - Include the name of Local Housing Authority
 - Include the CapHub project #
 - Include screenshot of error / issue
 - Urgency level – Critical, High, Medium, Low
- Please use self service options available in CapHub:
 - 1 Primary per firm
 - Primary User adds new Design Consultants
 - Primary User adds DCs to specific projects

Main Contacts:

Stacey Reiling

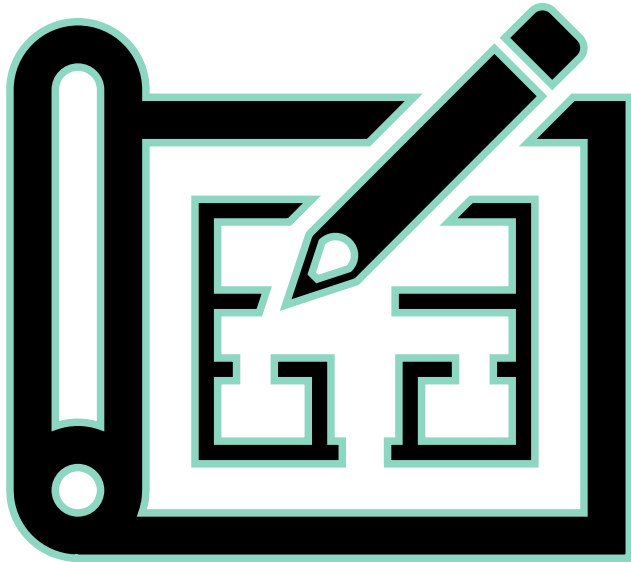
Capital Data & Systems

Stacey.reiling@mass.gov

Nick Monllos

Capital Data & Systems

Nick.monllos@mass.gov



Documents:

PROJECT GUIDES & REQUIREMENTS

Public Housing Modernization Page

<https://www.mass.gov/public-housing-modernization-documentation>

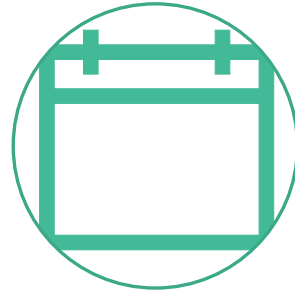


Design Guidelines

- Roughly by CSI category
- Not Specs, do not refer to them in your spec sections
- Sustainability and Resiliency wrapped into the guidelines
- Aging in Place Checklist
- Multifamily New Construction for Special BHCD initiative

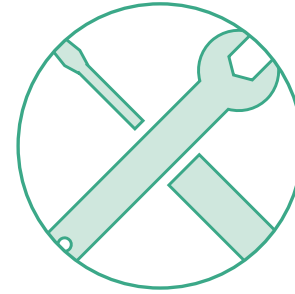


Public Bidding Info



Front End Documents

- Also part of Smart Spec
- At varied procurement levels based on ECC



Construction Handbook



Sustainability and Resiliency

Other Guidelines - MAAB



Developments are looked at as a whole, not an individual building



Compliance funding available to some housing authorities



Sometimes able to defer to other developments within the LHA which exceed the unit count requirement



It was signed into law Affordable Homes Act included a policy provision for EOHLC to provide the MAAB with replacement values for the state-aided public housing portfolio on an annual basis. As of August 6, 2024, the state-aided public housing portfolio is no longer held to the \$73/square foot figure. Please see attached replacement values to be used for the remainder of fiscal year 25.

EOHLC Replacement Value FY25

Building Type	Replacement Value Per Square Ft
Wood Frame/Wood or Other Siding Enclosure (1-4) floors)	\$606
Wood Frame/Masonry Enclosure (1-3 floors)	\$571
Concrete Frame/Concrete Panel Enclosure (1-3 floors)	\$551
Steel Frame/Concrete Panel Enclosure (4-7 floors)	\$537
Concrete Frame/Masonry Enclosure (8-20 floors)	\$530
Steel Frame/Masonry Enclosure (8-20 floors)	\$516
Concrete Frame/Concrete Panel Enclosure (8-20 floors)	\$514
Steel Frame/Concrete Panel Enclosure (1-3 floors)	\$506
Concrete Frame/Masonry Enclosure (1-3 floors)	\$500
Concrete Frame/Concrete Panel Enclosure (4-7 floors)	\$494
Concrete Frame/Masonry Enclosure (4-7 floors)	\$487
Steel Frame/Metal Panel Enclosure (4-7 Floors)	\$480
Steel Frame/Masonry Enclosure (4-7 floors)	\$471
Steel Frame/Masonry Enclosure (1-3 floors)	\$451



CLOSING/ QUESTIONS