



Lee County

Human &  
Veteran Services

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# ***Contractor's***

# **Guidelines**

# **and**

# **Information**

# **Packet**

Effective Date: 09/6/2023

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## *Contractor* Guidelines and Information Packet

Thank you for choosing to work with the Lee County Human and Veteran Services (HVS) in assisting low-income families in Lee County. HVS currently accepts bids for repairs and rehabilitation of homes in Lee County.

All information necessary to bid on and successfully complete jobs with the Lee County HVS is listed in this packet. Please carefully review all information featured below and keep this packet for reference.

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## Funding

The Lee County Human and Veteran Services receives funding from federal and state grant programs to aid income qualified homeowners and homebuyers. Each individual program has a specific set of guidelines and requirements.

### Neighborhood Stabilization Program (NSP)

The Neighborhood Stabilization Program purchases foreclosed/abandoned homes in target areas throughout Lee County and utilizes general contractors to rehabilitate each home. Once completed, these homes are then sold to qualified NSP buyers.

### Owner Occupied Rehabilitation

The Owner Occupied Rehab program aids income qualified homeowners in making necessary repairs to their homes. Emergency repairs are also considered under the owner occupied rehab program; bids for these repairs are opened on an annual basis.

## Bidding

### Bid Specifications

Invitations and Bid Specifications will be posted on the “Open Bids” page of the Lee County HVS website or may also be picked up from the HVS office. Please contact our office so that specifications may be printed for you.

1. Pre-bid meetings are held at the discretion of the Rehabilitation Specialist assigned to the job.
  - a. If a pre-bid meeting is held, an invitation will be posted on the “Open Bids” page of the Lee County HVS website:  
<https://www.leegov.com/dhs/partner/openbids>
  - b. Contractors must attend the pre-bid meeting to bid on the job.
2. If NO pre-bid meeting is held, bid specifications will be posted on the “Open Bids” page of the Lee County HVS website: <https://www.leegov.com/dhs/partner/openbids>

## Submitting a Bid

1. Each bid must be submitted in an individual sealed envelope
  - a. Do not place multiple bids in one envelope
2. The following must be clearly displayed on the outside of each envelope:
  - a. Homeowner's name and property address
  - b. Business name and address
  - c. Bid opening date and time and
  - d. "Sealed Bid"
3. A bid will be considered non-conclusive/non-responsive if it is incomplete, received late, incorrectly calculated, lines are left blank, etc.
4. All bids must be completed in ink

## Lowest Bidder

Florida Statutes require HVS to award to the lowest, most responsible, responsive bidder. If a contractor is not performing and there is sufficient documentation to that effect, the award may go to the second lowest bidder.

## Bid Opening

1. Bids are due on the date written on the Job Specification, usually 7-10 days from the date that the bid was posted to the website for major rehabs, usually 3-5 days for emergency-major systems repairs.
2. Bids are always due by 3pm the day of opening. No exceptions. - If there is a line in the lobby contact a housing staff member.

## Awarded a Job

### Notice of Award

You will be notified via email, hand delivery, or mail, with a Notice of Award (*Attached*) within 45 days after the bid opening if you have been awarded a job. Awarded contractor must accept award, in writing, within seven (7) days of receipt of Notice of Award. If a contractor wishes to decline a bid award they must notify HVS in writing within seven (7) days of receipt of the Notice of Award. They must state that they wish to withdraw their bid, and their reasoning for doing so. HVS will evaluate the reason for withdrawal and determine if the contractor will be allowed to withdraw the bid. Contractors with three (3) open rehabilitation contracts will not be eligible to receive a bid award until one or more of the open contracts has been satisfactorily completed. Bids received from contractors with three (3) open rehabilitation contracts will be ineligible for award.

## Notice to Proceed

1. Notice to Proceed must be signed within seven (7) calendar days after receiving notification that it is ready
2. Do not begin work until the Notice to Proceed has been executed by all parties
3. The timeline for job completion can be found on the job specifications, the contract, and the Notice to Proceed.

## Permits

1. You must apply for permits within fourteen (14) calendar days from date of Notice to Proceed
2. All permits, governmental fees and licenses necessary for the proper execution and completion of the work must be obtained prior to the commencement of all work required by job specifications, copies of such licenses and permits shall be provided to the Rehab Specialist upon receipt.
3. Each contractor will submit, to the Rehab Specialist, an official, stamped copy of job specifications that have been signed off by the building department certifying that all permits applicable to the work required have been applied for.

## Change Orders

1. If changes to the original specifications are necessary, you must:
  - a. Submit an estimate to the Rehab Specialist
  - b. Wait for a change order to be approved before you begin work on those changes.
2. Photo documentation is required for all wood rot replacement. Photos should:
  - a. Be clear as to the site where work is taking place
  - b. Illustrate work area before and after replacement
  - c. Be correctly date stamped
3. If any additional permits are required due to changes in the scope of work, those permits must be applied for within seven (7) calendar days after the written approval of the changes. Contractor shall furnish copies of all licenses and permits to Lee County Human and Veteran Services (Housing).

## Invoicing

Invoices may be submitted when all work or a percentage of work has been completed (varies by program). Upon submission of an invoice the Rehab Specialist assigned to the job will inspect the work for completion and workmanship, and either approve or deny payment of the invoice.

Invoices may only be submitted once the work listed on the invoice has been completed. Failure to complete work prior to submitting an invoice for that work will result in delayed payment of that invoice.

If a final permit inspection is required (i.e., roof replacement, HVAC replacement), the inspection must be completed prior to Rehab Specialist approval.

1. The following must be clearly displayed on each original invoice:
  - a. Business Name and Address,
  - b. Date
  - c. Purchase Order Number
  - d. Homeowner's Name and Property Address
  - e. Invoice Number
  - f. Description of Work Completed
  - g. Amount being invoiced
  - h. Retainage
  - i. Work Complete "From – To" Dates
2. Only Original Invoices will be Accepted - No fax, email or copies will be accepted.
3. If you have a "remit to" address (i.e. a P.O. Box) that is different than your business/mailing address you must display both the business/mailing address and the "remit to" address on each invoice.

### **Draws**

1. Multiple draws may be allowed for some jobs, as per contract
2. Should you need more draws please contact the Rehab Specialist
3. Invoicing for permitted work must have final inspection

### **Final Invoice (Retainage)**

1. All work must be completed
2. Warranties – must be completed and given to Housing Finance Counselor
3. Lien Waivers – Required
4. Owner Approval & Acknowledgement Form – must be signed by homeowner prior to payment
5. Permits – all final inspections must be completed

## Standards of Work

### Subcontractors/Employees

1. Subcontractors and employees should be closely supervised
2. Smoking, Drinking, and substance abuse is strictly prohibited on Lee County property
  - a. Contractor's must adhere to Lee County BoCC Policy 103 (Tobacco Free Workplace) and 205 (Drugs and Alcohol in the Workplace);  
<http://www.leegov.com/hr/policies>
  - b. Violation of this policy will result in disciplinary action, as noted in each contract

### Job Site

1. Jobs sites must be left in excellent condition; all trash, dust, materials, equipment, etc. must be cleared from worksite
2. Homes must be secured every time the job site is left unattended. I.e. Lock Doors, Set thermostat to proper temperature, Secure all equipment and materials.
3. HVS does not recommend leaving any materials, equipment, or tools on site.

### Completing Work

1. All work must be completed:
  - a. According to the specifications
  - b. In a workman like manner
  - c. On Time
    - i. Late Fees will be enforced per the contract agreement
    - ii. The timeline you have to complete the job can be found on the job specifications, the contract, and the Notice to Proceed
2. No deviation from specifications is allowed without written approval from HVS in the form of a change order
3. Up-selling clients is strictly prohibited

### Termite Inspections

Termite Inspections must be completed and the report must be sent to the Rehab Specialist at the beginning of the job.

### Color and Materials Selection

1. Contractor must obtain written verification of client's color and material selection on jobs that allow for client's to make such selection.
2. Written verification must be signed by client and given to the Rehab Specialist before installing materials.



## Communication with Homeowners/HVS

1. Communication with homeowners and Rehab Specialists is required throughout every job. Any issues with clients, materials, specs, subcontractors or otherwise need to be reported immediately and in writing to the Rehab Specialist.
2. Appointments need to be made with homeowners. Ensure that all appointments are kept and attended in a prompt manner. If you are unable to keep a scheduled appointment contact the homeowner as soon as you are aware of an issue.
3. Always respect the homeowner, their property, and their possessions.

## DHS Contact Information

Name	Title	Email	Phone
Brian Bissell	Rehab Specialist	<a href="mailto:bbissell@leegov.com">bbissell@leegov.com</a>	239-533-7943
George Effing	Rehab Specialist	<a href="mailto:geffing@leegov.com">geffing@leegov.com</a>	239-533-7959
Debbie Curran	Housing Finance Counselor	<a href="mailto:dcurran@leegov.com">dcurran@leegov.com</a>	239-533-7938
Diane DeGuzman	Housing Finance Counselor	<a href="mailto:ddeguzman@leegov.com">ddeguzman@leegov.com</a>	239-533-7953
Joann Santana	Housing Finance Counselor	<a href="mailto:jsantana3@leegov.com">jsantana3@leegov.com</a>	239-533-7926
Susan Sarazen	Administrative Specialist	<a href="mailto:ssarazen@leegov.com">ssarazen@leegov.com</a>	239-533-7982
Stacy Sherlock	Community Impact Supervisor	<a href="mailto:ssherlock@leegov.com">ssherlock@leegov.com</a>	239-533-7931

### Physical Address:

Lee County Human and Veteran Services  
Housing Services  
2440 Thompson St  
Fort Myers, FL 33901

### Mailing Address:

Lee County Human and Veteran Services  
Housing Services  
PO Box 398  
Fort Myers, FL 33902

**Main Phone:** 239-533-7930

**Fax:** 239-533-7955

**Website:** [www.leegov.com](http://www.leegov.com)

## Contractor Suspension

HVS reserves the right to suspend a contractor for good cause or other grounds under applicable law, regulation, County policy, or for other legally sufficient reasons, according to the procedures outlined in this Section. A suspended contractor will not be awarded any jobs during the term of the suspension. For purposes of this section, the term “good cause” includes, but is not limited to, the following grounds:

1. Failure to execute work in a timely manner or failure to supply proper documentation in a timely manner;
2. Failure to execute work or re-execute any work that, in the opinion of HVS, fails to conform to the requirements of the contract during the progress of the work;
3. Failure to remedy any defects due to faulty materials or workmanship that appear within a period of one (1) year from the date of completion of the project;
4. Failure to honor any warranty items within the applicable warranty period(s);
5. Failure to pay subcontractors and/or material suppliers within thirty (30) days;
6. Collusion or appearance of collusion with, or coercion of, property owners and/or other contractors;
7. Inadequate supervision of employees or other workers on job sites;
8. Evidence of use of alcohol or drugs on job sites, or evidence that work has been performed while under the influence of alcohol or drugs (which shall be grounds for termination of the contract, disqualification, or denial of further participation in all HVS housing improvement programs);
9. Failure to remove hazardous materials and/or debris from job sites in order to prevent injuries;
10. Being placed on the U. S. HUD list of debarred contractors; or
11. Complaints filed against the contractor by vendors, homeowners, other contractors or third parties.

If one or more of the above or any other issues arise a contractor may be placed on 30 day probation. HVS will identify the issues that need to be remedied by the contractor during the probationary period. At the end of the 30-day probation period, if these issues have not been resolved to the satisfaction of HVS, the contractor will be notified in writing that they are being suspended from further participation in HVS projects or jobs for ninety (90) days. During the 90-day suspension, no bids will be accepted from the contractor.

HVS reserves the right to decide whether to award future jobs to a suspended contractor. In the event that the issues leading up to the suspension remain unresolved at the expiration of the suspension period, or for other good cause shown. HVS reserves the right to extend the suspension period for a reasonable period of time, not to exceed two (2) years, depending upon the circumstances.

## Section 3/ DBE Contractors

### Section 3

Section 3 is a provision of the Housing and Urban Development Act of 1968. Section 3 is intended to ensure that when employment or contracting opportunities are generated because a covered project or activity necessitates the employment of additional persons or the awarding of contracts for work, preference must be given to low- and very low-income persons or business concerns residing in the community where the project is located.

For more information and to become a certified Section 3 business, please contact:

**The Housing Authority of the City of Fort Myers**  
**4224 Renaissance Preserve Way**  
**Fort Myers, FL 33916**  
**Phone: 239-334-3220**

### DBE/MBE

Disadvantaged and Minority Businesses may apply for certification through the state of Florida. For more information and assistance with the application process, please contact:

**FGCU Small Business Development Center**  
**Florida Gulf Coast University**  
**College of Business**  
**Sugden Hall, 2nd Floor**  
**10501 FGCU Blvd, S.**  
**Ft. Myers, FL 33965**  
**Phone: (239) 745-3700**  
**Fax: (239) 745-3710**  
**E-mail: sbdc@fgcu.edu**

## Notice of Award Form

### NOTICE OF AWARD

**Date:** \_\_\_\_\_

\_\_\_\_\_  
**Contractor Name**

\_\_\_\_\_  
**Contractor Address**

**Re:** \_\_\_\_\_

Dear Contractor:

This letter is to inform you that your company has tentatively been chosen to complete the rehabilitation work on the above referenced property. This is not an agreement or contract.

Please be aware that you are not authorized to proceed with the work until a contract has been executed and a written notice to proceed has been issued. Lee County will do everything possible to insure a notice to proceed is ready within forty-five (45) calendar days from the date of this award.

If you are not already an approved Lee County vendor, or if any of your documentation on file has expired, you have ten (10) days from the date on this document to establish or update your records with Lee County Procurement Management. Please contact that office directly about any vendor questions or comments at 239-533-8881.

Once you are contacted by our office that the notice to proceed is ready, you will have seven (7) calendar days to come to our office to execute the notice to proceed and contract documents. Otherwise, the job will be passed to the next eligible bidder.

**NOTE: You will have \_\_\_\_\_ calendar days to complete this project once the Notice to Proceed has been executed by both parties. Time will start as of the date of the Notice to Proceed (not from the date permits are received). If the rehab is not completed within the agreed upon time-frame, a penalty of \$50.00 per calendar day may be charged to the contractor for every day over the rehab time-frame. This penalty will be strictly enforced.**

Lee County Department of Human and Veteran Services will contact you when the notice to proceed and contract documents are ready.

Sincerely,  
Lee County Department of Human and Veteran Services