

Jacksonville Housing Authority

REQUEST FOR QUALIFICATIONS (RFQ) No. PS-006-22

Developer Partner



REQUEST FOR QUALIFICATIONS (RFQ) No. PS-006-22, Developer Partner

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INTRODUCTION

The Jacksonville Housing Authority (hereinafter, “the Agency”) is a public entity that was formed to provide federally subsidized housing and housing assistance to low-income families in the Duval County, Baldwin, and Jacksonville Beach areas. The Agency is headed by a President / CEO and is governed by a seven-person board of commissioners and is subject to the requirements of Title 24 of the Code of Federal Regulations (hereinafter, “CFR”), Florida Statute Chapter 287, and the Agency’s procurement policy.

In keeping with its mandate to provide efficient and effective services, the Jacksonville Housing Authority (JHA) is now soliciting proposals from qualified, licensed, and insured independent contractors to provide the noted services outlined in this solicitation for all Public Housing properties at the Jacksonville Housing Authority. All proposals submitted in response to this solicitation must conform to all the requirements and specifications outlined within this document and any designated attachments in its entirety.

RFQ INFORMATION AT A GLANCE

[Table No. 2]

JHA CONTACT PERSON (NOTE: Unless otherwise specified, any reference herein to “Contracting Officer” or CO” shall be a reference to the Agency contact person listed)	Colene Orsini Telephone: (904) 366-6078 Email: corsini@jaxha.org
HOW TO OBTAIN THE RFP DOCUMENTS ON THE EPROCUREMENT MARKETPLACE	1. Access ha.internationaleprocurement.com (no “www”). 2. Click on the “Login” button in the upper left side. 3. Follow the listed directions. 4. If you have any problems in accessing or registering on the Marketplace, please call customer support at (866)526-9266.
PRE-BID MEETING TIME & LOCATION	April 27th, 2022 @ 2:00 p.m. EST Due to current restrictions related to COVID-19, a pre-bid meeting will only be held via Microsoft Teams. If you are interested in attending, email the Contact Person, and request a meeting invite be forwarded that contains all the necessary information to join.
WRITTEN INQUIRIES SUBMITTAL DEADLINE	May 16th, 2022 at 12:00 p.m. (Noon) EST
HOW TO FULLY RESPOND TO THIS RFP BY SUBMITTING A PROPOSAL SUBMITTAL	All Proposals must be clearly labeled and denote the above RFP number and submitted in a sealed envelope to 1300 Broad Street N. Jacksonville, FL 32202 and include the items outlined in Section 3.0. It must include one (1) original and four (4) copies of your full submittal package.
PROPOSAL SUBMITTAL RETURN & DEADLINE	Proposal Due: May 31st, 2022 at 3:00 p.m. EST Jacksonville Housing Authority 1300 Broad Street N. Jacksonville, FL 32202

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- 1.0 THE AGENCY’S RESERVATION OF RIGHTS.** The Agency reserves the right to
- 1.1 Right to Reject, Waive, or Terminate the RFQ.** Reject any or all proposals, to waive any informality in the RFQ process, or terminate the RFQ process at any time if deemed by the Agency to be in its best interests.
 - 1.2 Right to Not Award.** Not to award a contract pursuant to this RFQ.
 - 1.3 Right to Terminate.** Terminate a contract awarded pursuant to this RFQ, at any time for its convenience upon 10 days’ written notice to the successful proposer(s).
 - 1.4 Right to Determine Time and Location.** Determine the days, hours, and locations that the successful proposer(s) shall provide the services called for in this RFQ.
 - 1.5 Right to Retain Proposals.** Retain all proposals submitted and not permit withdrawal for a period of 60 days subsequent to the deadline for receiving proposals without the written consent of the Agency Contracting Officer (CO).
 - 1.6 Right to Negotiate.** Negotiate the fees proposed by the proposer entity.
 - 1.7 Right to Reject any Proposal.** Reject and not consider any proposal that does not meet the requirements of this RFQ, including but not necessarily limited to incomplete proposals and/or proposals offering alternate or non-requested services.
 - 1.8 No Obligation to Compensate.** Have no obligation to compensate any proposer for any costs incurred in responding to this RFQ.
 - 1.9 Right to Prohibit.** At any time during the RFQ or contract process to prohibit any further participation by a proposer or reject any proposal submitted that does not conform to any of the requirements detailed herein. By accessing the eProcurement Marketplace (hereinafter, a.k.a. “the Marketplace”) and by downloading this document, each prospective proposer is thereby agreeing to abide by all terms and conditions listed within this document and within the eProcurement Marketplace, and further agrees that he/she will inform the CO in writing within 5 days of the discovery of any item listed herein or of any item that is issued thereafter by the Agency that he/she feels needs to be addressed. Failure to abide by this timeframe shall relieve the Agency, but not the prospective proposer, of any responsibility pertaining to such issue.
 - 1.10 Right to Reject – Obtaining Competitive Solicitation Documents.** The eProcurement Marketplace is the only official and appropriate venue to obtain the competitive solicitation documents (and any other information pertaining to the competitive solicitation such as addenda). Accordingly, by submitting a response to this competitive solicitation the respondent thereby affirms that he/she obtained all information on the eProcurement Marketplace. Any other group such as a proposal depository that informs potential respondents of the availability of such competitive solicitations are hereby instructed to not distribute these documents to any such potential respondents, but to instruct the potential respondents to visit the eProcurement Marketplace to obtain the documents. The Agency will reject without consideration any response submitted from a firm that has not obtained the documents from the eProcurement Marketplace.

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2.0 SCOPE OF WORK/TECHNICAL SPECIFICATIONS. The Agency is seeking proposals from qualified, licensed, and bonded entities to provide the Agency with the following Developer Partner services.

2.1 General Background

2.1.1 The Jacksonville Housing Authority (the "Authority") requests firms or individuals interested in serving as Developers to the Authority to submit qualifications for consideration. The Jacksonville Housing Authority is a public housing (P.H.) entity established in September 1994 pursuant to the Authority under the U.S. Housing Act of 1937 and Chapter 421 of the Florida Statutes.

The Jacksonville Housing Authority desires to provide additional housing opportunities to extremely low and low to moderate-income residents in Duval County, located in northeast Florida. The Authority has public housing (A.C.C.) capacity and administers the Section 8 Housing Choice Voucher Program sponsored by the United States Department of Housing and Urban Development (HUD). The Authority desires to revitalize its communities, vacant lots, and existing units through a public/private partnership with a qualified Developer. As of the issuance of this solicitation, JHA. owns 2,837 public housing units and administers over 8,302 vouchers under the Housing Choice Voucher and similar programs. The JHA. anticipates placing some of its public housing portfolios on the RAD. Waitlist.

The selected Developer would serve in a full-service capacity, advising the Authority as needed on all financings and programs of work involving the acquisition and development of affordable housing assets designed to improve and expand the availability of affordable housing in Jacksonville, Duval County, Florida.

The Authority will consider utilizing multiple debts and equity instruments, including tax-exempt bonds, low-income housing tax credits, mortgage financing, limited partnerships, HOME funds, SHIP funds, and public/private collaborations, as its principal forms for funding and development of existing assets and the creation of additional affordable housing. From time to time, the Authority may use proprietary funds for credit enhancements, development loans, or other purposes to provide affordable housing in Duval County, Florida. A significant role of the selected Developer will be to identify adequate development funds from these and other sources.

2.2 Request for Qualifications

2.2.1 The Authority is requesting proposals from experienced Developers to participate in the development activities described herein. The Authority's development activities may utilize a mixed-finance methodology resulting in a

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viable mixed-income residential community containing affordable housing, which may include elderly and family units.

The Authority is considering redevelopment, rehabilitation, preservation activities, or new construction of its properties and vacant lots.

The Authority may elect to self-develop any phases should funding become available from HUD or other sources that do not require a developer. The Authority further reserves the right to procure for one (1), two (2), all, or none of the sites or may look at new sites not currently owned by the Authority. The Authority reserves the right to choose whether or not to utilize a Developer or a Developer partner for any of its anticipated projects or to utilize the same Developer/Developer for multiple projects. The Authority reserves the right to use any JHA-owned affiliated entities for its anticipated projects.

The Authority wishes to encourage a high-quality architectural design for all work that will revitalize the area. The developments will provide amenities commensurate with market-rate properties according to state and local ordinances and any requirements of applicable funding applications, including a clubhouse, pool, business center, laundry facilities, etc.

The Authority seeks to incorporate Green Building techniques, increase community safety through environmental design, and provide ample green space and parking.

The Authority is requesting proposals from interested Developers to undertake the redevelopment or rehabilitation of the Development(s).

2.3 Pertaining to the Successful Proposer. Hereinafter, when talking about the "selected successful proposer," the Agency may utilize any of the following terms (or any combination of the terms):

2.3.1 "Successful Proposer" or "Successful Proposer(s);"

2.3.2 "Selected Firm" or "Selected Firm(s);"

2.3.3 "Developer" or "Developer(s);" or

2.3.4 "Developer Partner" or "Developer Partner(s)."

2.3.5 The terms may be utilized in the "singular" form because the Agency reserves the right to at any time during the ensuing contract period(s) to select one firm only to provide the services: or

2.3.6 The terms may be utilized in the "plural" because the Agency reserves the right at any time during the ensuing contract period(s) to select more than one firm to provide services.

2.3.7 Whenever the term is utilized in the "singular," such requirement may also be applied as if the term has been used in the "plural," meaning all requirements herein shall apply to any Developer Partner that the Agency may choose to do work.

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2.3.8 Anywhere (including within the Attachments listed within the following Table No. 4), the term "Contractor" is utilized unless specific reference is made to a "construction contractor," such term may also mean the same as the terms identified within the preceding Sections 2.3.1 through 2.3.4 herein. It is the responsibility of the prospective or actual proposers to request in writing clarification when there is any doubt as to the application of this requirement (or any other requirements herein).

2.4 Anticipated General Scope of Services. The Agency anticipates that the firm(s) chosen will be an experienced development firm that will direct the revitalization of the public housing sites identified by the Jacksonville Housing Authority. The successful proposer(s) will be considered the Developer Partner. The Agency intends that this Developer Partner will direct all development activities under the oversight of the Agency. The Agency intends that, under a newly created, non-profit affiliate/instrumentality, the Agency will maintain an ownership interest in any redeveloped housing. The Agency recognizes that it does not currently possess the development expertise to carry out the revitalization but seeks a Developer Partner that will assist the Agency in building capacity in the development and property management areas. The Developer Partner will evaluate the identified developments. A revitalization/redevelopment plan shall be implemented to delineate the proposed demolition and new multi-phased, multi-unit, mixed-income residential housing. The Agency envisions the reintegration of the sites into the fabric of adjoining neighborhoods through several general phases of development.

2.5 Background Information.

2.5.1 RAD applications may be submitted to the Department of Housing and Urban Development (HUD) for specific developments. They may be incorporated into the redevelopment financing options accordingly, contingent upon Agency and HUD approval of the same.

2.5.2 If appropriate and as JHA. proceeds, a RAD. Physical Conditions Assessment is in process and will be made available to the Development Partner.

2.6 The Role of the Selected Developer Partner. The Developer Partner shall be responsible for the following:

2.6.1 Be expected to refine this preliminary work in the Strategic Plan and undertake additional studies as necessary to submit a high-quality 9% LIHTC application in 2023.

2.6.2 Work closely with the City of Jacksonville and other community groups and stakeholders who have expressed an interest in redeveloping the areas surrounding the public housing sites. Indicate a clear understanding of your approach to the general planning process. The Agency or an instrumentality/affiliate of the Agency will serve as the Developer for the revitalization effort and intends to be actively involved in the development process.

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- 2.6.3** As the Agency's goal is to have the revitalization efforts proceed as expeditiously as possible, responses that demonstrate an ability to complete the revitalization on the earliest possible, realistic schedule will be favorably received by the Agency. It is fully expected that the Developer Partner shall submit a 2023 LIHTC application to Florida Housing Finance Group. The Developer shall confirm its ability to start work immediately and propose a staffing plan that describes the existing time commitments of the staff assigned to the project.
- 2.6.4** This RFQ is intended to retain a comprehensive Developer Partner for revitalization. Respondents shall present a complete team to the Agency, including architectural, legal, financial, general construction, and property management services. The Developer Partner shall not be allowed to hold an interest in the selected general contractor firm or the property management firm unless said firms are acceptable and approved by both the Agency and HUD at closing.
- 2.6.5** The JHA. is interested in playing a role in property management, subject to investor approval, and the Developer respondent must describe how the JHA. and its current staff might participate in and develop experience managing mixed-income and tax credit communities over time.
- 2.6.6** Will be an integral partner with the Agency in the effort to develop a mixed-income community that is integrated with the surrounding neighborhoods. The Developer Partner will be required to work closely with the Agency and any appropriate neighborhood or community organization.
- 2.6.7** Oversee and implement redevelopment effort. Provide the necessary staffing, expertise, supervision, and guarantees to implement all aspects of the redevelopment fully and expeditiously as required by the ensuing contract.
- 2.6.8** Hire and manage consultants and contractors necessary to implement the development; procure other consultants and contractors and coordinate all tasks required to assist in developing the Master Site Plan and implement the development(s) according to the ensuing contract. At a minimum, the Developer's team will need to include consultants appropriate to cover the architectural, environmental review, market analysis, geotechnical studies, civil, mechanical, and electrical engineering, construction, property management, and any other activities deemed necessary by the Developer and the Agency. Proposers are strongly encouraged to demonstrate participation on their team of local expertise in areas of relevance to the development process, including LIHTC financing and construction matters.
- 2.6.9** Serve as the Developer Partner with the Agency to revitalize and convert the identified public housing sites as may be assigned throughout the Master Development Agreement.
- 2.6.10** Assist with a working partnership with the residents, the Agency, and other stakeholders to promote the community vision and comprehensive master plan.
- 2.6.11** Assist with linkages between the development(s) and the surrounding neighborhood.
- 2.6.12** Prepare a Revitalization Plan that shall include:

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- 2.6.12.1** A timetable with milestones for completion.
- 2.6.12.2** Market study sufficient to identify the need to build additional housing units, and if so, unit type (elderly; assisted living; mixed-income; etc.), how many units, where they should be located, and when they should be built.
- 2.6.12.3** Plan for demolition and relocation of residents, as necessary, so as not to disrupt the fiscal operation and financial integrity of the Agency.
- 2.6.12.4** Review the current physical needs assessment reports recently conducted by The Nelrod Company, property condition reports, and related Agency reports.
- 2.6.12.5** Identify available funding sources for each proposed action, including traditional and alternative financing options.
- 2.6.12.6** Develop a management plan, including a transition plan back to the Agency for property management.
- 2.6.12.7** Obtain approvals as may be required to garner City, state, federal, or HUD approvals required to initiate any proposed projects.
- 2.6.12.8** Plan for public relations that ensures resident, community, and local government support for any redevelopment activities.
- 2.6.12.9** Communication with key affordable housing program administrators such as the FHFC.
- 2.6.12.10** Review local housing inventory to determine and make recommendations for any potential acquisitions of existing single-family or multi-family housing within the redevelopment areas.
- 2.6.13** Coordinate the environmental and geotechnical testing and an analysis of the condition of existing utilities at the sites at each phase of development.
- 2.6.14** Ensure provision of genuine training and employment opportunities to Section 3 individuals.
- 2.6.15** Provide a suitable, realistic plan for participation by MWBE and Section 3 firms throughout the development.
- 2.6.16** Oversee the development of a market study for each site and phase of development, as required.
- 2.6.17** Develop a construction strategy and a development implementation schedule and maintain a detailed schedule predicated on financing deadlines that include predevelopment activities, construction start, project stabilization, and permanent loan close, including a Critical Path Schedule for all phases of construction, lease-up, and stabilization.
- 2.6.18** Work with the Agency to develop detailed development and operating budgets. The Developer Partner will be required and responsible for expanding and updating the development budget.
- 2.6.19** Secure firm commitment letters from all lenders and funding sources and prepare and submit all funding applications, including low-income housing tax credit (LIHTC) application(s).
- 2.6.20** Prepare a financing plan acceptable to the Agency and HUD

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- 2.6.21** Develop the ownership structure mutually agreeable to both the Developer Partner and the Agency.
- 2.6.22** Maintain communication with the Agency and the Agency residents regarding development progress.
- 2.6.23** Provide regular monthly reports to the Agency on the progress of the development efforts, including work completed, associated costs, schedule, and budgetary requirements.
- 2.6.24** Work with the Agency and its legal team to create an ownership structure for the development, including an instrumentality or affiliate of the Agency as a general partner.
- 2.6.25** Oversee the construction contractor and provide construction project management to ensure units are delivered within the timeline prescribed by the Investor.
- 2.6.26** Negotiate favorable operating and financing guarantees to the equity investor and other lending institutions.
- 2.6.27** Assist in obtaining all required building permits and zoning approvals.
- 2.6.28** Implement quality assurance and control measures to ensure effective performance by all parties in all aspects of the program and ensure the Phases are constructed with the highest quality materials and quality.
- 2.6.29** Assist the management company in developing the marketing and lease-up plan.
- 2.6.30** Foster community involvement in development implementation.
- 2.6.31** Provide the community and supportive services plan.
- 2.6.32** Assist with resident relocation plan, timeframe, and efforts as may be required.
- 2.6.33** Oversee asset management functions as required through lease-up and conversion to permanent financing.
- 2.6.34** **Financing.**
 - 2.6.34.1** Produce an Overall Financing Plan. Produce a viable financing plan for the overall Mixed-Income Communities Initiative. The comprehensive financing plan will be developed in conjunction with the plan, market analysis, and availability of public sector funding. The plan shall reflect the realities of the financing plan and market analysis, while the financing plan will reflect the plan's goals. The financing plan must demonstrate a sensitivity and approach to using Agency funds most efficiently and maximizing leveraging the HUD funds to the greatest extent possible.
 - 2.6.34.2** Financing Application(s). Under the ensuing contract, the Developer Partner will be required to pursue diligently and use best efforts to obtain all financing necessary to implement the plan quickly. This could include but is not limited to CDBG funding, tax credits, tax-exempt bonds, state and local funds, and private debt. Time is of the essence for replacement public housing units, so careful attention should be paid to upcoming funding opportunities and meeting those deadlines. The Developer will be expected to submit an initial low-income tax credit application in 2023.

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- 2.6.34.3** Maximize the Leveraging of Public and Private Resources. Under the ensuing contract, maximize the leveraging of public and private resources by pursuing all reasonable sources of financing and utilizing a variety of partners and partnerships. Take full responsibility for securing all financing sources in a timely fashion. Coordinate discussion and negotiations with financial institutions and private partners. All financing terms are subject to review and approval by the Agency.
- 2.6.34.4** Obtain Equity Investment. Obtaining equity financing commitments on the best terms currently available as required by the ensuing contract.
- 2.6.34.5** Guarantees. Under the ensuing contract, provide all guarantees required for the successful financing of the Development, including completion guarantees, operating deficit guarantees, and tax credit adjuster or recapture guarantees and guarantees of performance under the ensuing contract. The Agency will require that the Developer demonstrate financial ability to honor the guarantees and indicate how they intend to honor the guarantees if necessary.
- 2.6.34.6** Operating Feasibility. As required in the ensuing contract, structure such reserves and other devices as will reasonably guarantee the long-term operating feasibility of the Development, utilizing no more subsidy than committed to by the Agency.
- 2.6.35** Retain Qualified General Contractors and Oversee Construction Activities. During construction, the Developer Partner shall provide oversight and management, as deemed necessary, of construction activities by coordinating with all development team members and attending job-site meetings to ensure the expeditious implementation of construction activities.
- 2.6.36** Facilitate Necessary Site Improvements. Under the ensuing contract, the Developer Partner shall initiate and complete site work and infrastructure construction in collaboration with Agency.
- 2.6.37** Implement Development Program. Under the ensuing contract and the final plan approved by Agency, the Developer will develop all improvements associated with the development program, including multi-family and single-family units, community facilities, and any commercial space.
- 2.6.38** Mixed-income, Mixed-use, Mixed-tenure. Create new, economically viable mixed-income communities that include residential and, if feasible, non-residential uses. The communities should consist of affordable and market-rate rental and homeownership units as determined to be viable and advantageous through the master planning process. The different affordability types should be mixed across all building types and located throughout all sites.
- 2.6.39** Public Housing Units. Provide the replacement units for the existing public housing as affordable units in the new mixed-income communities. The bedroom mix will be based on the household sizes of returning residents, Agency waiting lists, and market studies conducted by the Developer.

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- 2.6.40** High-Quality Design. Create sustainable new communities of high-quality design that meet or exceed industry standards and are LEED-certifiable. Design the new communities to be respectful of the architectural vernacular of the area and in accordance with flood elevation requirements.
- 2.6.41** Neighborhood Integration. Integrate the development program into the City's other redevelopment plans and physically integrate the new mixed-income communities into the fabric of the surrounding neighborhoods, respecting existing street patterns and the context and character of the existing architecture. Incorporate acquired properties and acquire properties surrounding each site to the extent feasible to develop a larger community that addresses needs based on market conditions and long-term sustainability.
- 2.6.42** Economic Development. Due to market conditions and availability of funding and in cooperation with the Agency and the City, incorporate non-residential program elements (i.e., retail facilities, high-quality schools, community centers, etc.) into the development program to strengthen the area's economic vitality. Maximize economic development opportunities for public housing residents, other Jacksonville residents, and women- and minority-owned businesses. Promote the Agency's Section 3 goals and objectives in constructing, developing, and operating the new communities.
- 2.6.43** Physical Needs Assessments are underway for all properties, which identify significant physical improvements that must be completed. This information will be made available to the successful Developer.
- 2.6.44** Throughout the redevelopment of the public housing units in mixed-income communities, the Developer Partner will work closely with Agency staff, residents, Agency consultants, and the City of Jacksonville and its consultants. The Developer Partner will ensure that the final plan is approved, financed, and implemented. The final plan must create the pathway for thriving, stable, diverse, safe, attractive, and sustainable mixed-income communities. In general, the plan's goal shall be to ensure that all units are produced in a manner that renders the public housing units indistinguishable from those targeted to other income groups.
- 2.6.45** Procurement. Consistent with 24 C.F.R. Subpart F, specifically §941.602(b)(2), whereas the Agency will exercise "significant functions within the owner entity with respect to managing the development of the proposed units," the requirements of 2 C.F.R. §200.317 - §200.326 will be complied with when either the Agency or the Developer Partner is conducting any procurement activities pertaining to any units developed as a result of the aforementioned ensuing contract (NOTE: Though 24 C.F.R. §85.36 is identified within the relevant portions of 24 C.F.R. §941, according to somewhat recent HUD-issued revisions it is now replaced by 2 C.F.R. §200.317 through §200.326).

2.7 Developer's Anticipated Qualifications/Experience/Expertise. The Selected Firm shall possess, or within its team provide, the following qualifications and experience (and the following detailed tasks shall also be the responsibility of the Developer Partner):

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- 2.7.1** Developing tax credit properties with Florida Housing Finance Corporation (FHFC). According to FHFC and any future Qualified Allocation Plan, the Developer must have demonstrated experience to receive the maximum points under Developer Experience to receive the maximum points allowed for developers in the scoring criteria. Firms that do not have this experience must clearly demonstrate how they intend to overcome this requirement in order to submit a competitive low-income housing tax credit application on behalf of the Agency.
- 2.7.2** Redevelopment or revitalization of affordable housing and neighborhoods.
- 2.7.3** Experience with public housing mixed-finance development, RAD, development, and working with PHAs.
- 2.7.4** Leveraging various financing vehicles, including private and public sources, including CDBG funds, HOME funds, Federal Home Loan Bank funds, Florida Trust Funds, and FHA financing.
- 2.7.5** Experience as a general contractor in developing housing, especially affordable housing; experience as an architect, property manager, and attorney in developing residential, esp. affordable housing.
- 2.7.6** Expertise in housing developments incorporating tax credit and affordable housing financing, including project-based vouchering.
- 2.7.7** Expertise in regulatory compliance issues.
- 2.7.8** Developing a strategy for fostering Section 3 employment, training, and contracting opportunities throughout the redevelopment process consistent with the requirements of Section 3 of the Housing and Urban Development Act of 1968, as amended (12 U.S.C. 1701u) with the Agency Section 3 Plan.
- 2.7.9** Taking all necessary affirmative steps to ensure that minority and women's business enterprises ("MWBs") are used to the greatest extent feasible in compliance with Presidential Executive Orders 11625, 12138, and 12432 promulgated in 2 C.F.R. §200.317 - §200.326.
- 2.7.10** Expertise with local government authorities, which regulate the permits and utilities necessary for the revitalization.
- 2.7.11** Expertise in Commercial and Mixed-use development. The Developer Partner must possess or have team members with solid experience in commercial and mixed-use development and affordable housing. Agency expects that at least some commercial and mixed-use development may be included in the redevelopment of these sites.
- 2.7.11** Developing a Homeownership Plan. In cooperation with the Agency and per HUD requirements prepare a detailed plan for any subsidized and non-subsidized homeownership opportunities proposed for public and non-public housing residents as may be requested.
- 2.7.12** Obtaining Environmental Clearances. In collaboration with the Agency, procure the necessary consultants and prepare the documents required to obtain environmental clearances from all interested agencies.
- 2.7.13** Plans and Specifications. The Developer Partner will prepare the infrastructure and building plans and specifications following industry standards for market-rate housing. Plans and specifications will be subject to Agency review. PLEASE NOTE: The plans and specifications may be physically prepared by

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a third-party architect selected by the Developer (with input or comment from the Agency).

2.8 Role of the Agency. The Agency will play the following roles in the planning and implementation of the Mixed-Income Communities Initiative:

- 2.7.1** HUD Contact. The Agency will manage and take responsibility for ALL communication with HUD, and the preparation and submission of program documents and evidentiary and obtain all HUD approvals, including but not limited to demolition/disposition approval and mixed-finance approval. However, to the extent any such documents or evidentiary are within the particular knowledge or responsibility of the Developer Partner, the Agency will expect the Developer Partner to prepare or assist in preparing such documents and evidentiary as the Agency may direct.
- 2.7.2** Local Partner. The JHA. will act as a local partner with the selected Developer in meetings with City, County, and State Departments and, to the extent needed, assist with the approval processes and garner political support for the project.
- 2.7.3** Provider of Operating Subsidies. The Agency will make financial contributions toward the cost of operating the revitalized development in the form of federal operating subsidies for the public housing units. The Agency will not provide the Developer Partner any amount larger than Agency receives from HUD, less an amount it will retain for its monitoring and asset management functions. The provision of the operating subsidies will be contained in a Regulatory and Operating Agreement, which will be negotiated between the Agency and the selected Developer Partner and approved by HUD
- 2.7.4** Property Management. The JHA is interested in playing a role in property management, subject to investor approval. The Developer respondent must describe how the JHA and its current staff might participate in and develop experience managing mixed-income and tax credit communities over time.
- 2.7.5** Landowner. The Agency intends to enter into long-term ground leases with the Owner Entities of the new mixed-income communities. The Developer Partner shall develop the public housing units in a manner that will qualify them for a Payment in Lieu of Taxes ("PILOT") and any related Cooperation Agreements with the City of Jacksonville as authorized by law if the Agency determines it will be in the best interest of the development.
- 2.7.4** Relocation. The Developer Partner will be responsible for managing and scheduling the moves of all displaced public housing residents who are eligible for return to the redeveloped communities per the Admissions and Continued Occupancy Policy (ACOP).
- 2.7.5** Asset Manager. The Agency will continue to have asset management responsibilities related to the public housing units and all other units in which the Agency or its affiliate has an ownership interest. The Agency will monitor and enforce the terms of its lease(s) and the Regulatory and Operating Agreements with the Developer Partner and require that all housing units be managed following applicable local, state, and federal requirements.

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- 2.9 Full Disclosure.** The Agency requires full disclosure of who is involved in a proposed tax credit development. Following are the rules of disclosures for this category:
- 2.8.1** Agency requires complete disclosure of all entities and individuals in the Project team organizational structures.
 - 2.8.2** Agency may require complete disclosure of all real estate and commercial loans for the project team by submitting a complete and accurate real estate properties disclosure.
 - 2.8.3** Any relationship between individuals or entities of the Project team that could constitute a conflict of interest or identity of interest between the parties must be disclosed.
 - 2.8.4** Complete organizational charts must be submitted for the Owner and Developer entity that clearly show all principals down to individuals involved in the ownership and development of the project. Please note that no change to the project owner/developer structure can be made without the express consent of the Agency.
 - 2.8.5** All Development fee-sharing arrangements must be disclosed. Agency considers all individuals or entities that receive a portion of the Development fee to be part of the Development structure.
 - 2.8.6** All Guarantor agreements must be disclosed. Agency may determine that a Guarantor is a real party in interest to either the General Partner or Developer entities.
 - 2.8.7** All consulting agreements—direct or indirect, paid or unpaid—shall be disclosed. Agency will review the amount of consulting fee to determine if a consultant is a real party in interest to either the General Partner or Developer entities.
 - 2.8.8** Any Project team member that has withdrawn or been involuntarily removed from a HOME or Tax Credit project in the last thirty-six months must disclose this information to Agency as part of its eligibility submission.
 - 2.8.9** All pending litigation.
 - 2.8.10** Significant non-performance in a government program must be disclosed.
 - 2.8.11** Any Project team member with an adverse credit history, including but not limited to a default in the payment of any commercial or personal loan, must disclose that information.
 - 2.8.12** *Principal* shall generally be defined as an individual who has at least a direct ownership interest in the general partner or developer entity and materially participates in the project's ownership, development, and operation through regular, continuous, and substantial involvement. For a non-profit entity, Agency will consider the executive director as a principal.
- 2.10 Previous/Current Contractor(s).** The Agency has not recently retained a contractor for these services.

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3.0 PROPOSAL FORMAT.

3.1 Tabbed Proposal Submittal. The Agency intends to retain the Contractor pursuant to a “Best Value” basis, not a “Low Bid” basis (“Best Value,” in that the Agency will, as detailed within the following Section 4.0, consider factors other than just cost in making the award decision). Therefore, so that the Agency can properly evaluate the offers received, all proposals submitted in response to this RFQ must be formatted in accordance with the sequence noted within the table below. Each category must be separated by numbered index dividers (which number extends so that each tab can be located without opening the proposal) and labeled with the corresponding tab reference also noted below. None of the proposed services may conflict with any requirement the Agency has published herein or has issued by addendum.

[Table No. 4]

(1) RFQ Section	(2)Tab No.	(3) Description
3.1.1	1	Form of Proposal. This Form is attached hereto as Attachment A to this RFQ document. This 2-page form must be fully completed, executed where provided thereon, and submitted under this tab as a part of the proposal submittal.
3.1.2	2	form HUD-5369-C (8/93), <i>Certifications and Representations of Offerors, Non-Construction Contract.</i> This Form is attached hereto as Attachment B to this RFQ document. This 2-page form must be fully completed, executed where provided thereon, and submitted under this tab as a part of the proposal submittal.
3.1.3	3	Profile of Firm Form. The Profile of Firm Form is attached hereto as Attachment C to this RFQ document. This 2-page form must be fully completed, executed, and submitted under this tab as a part of the proposal submittal.
3.1.4	4	Proposed Services. The proposer shall place under this tab documentation further explaining the proposer’s services and showing how the proposer intends to fulfill the requirements of the preceding Section 2.0 herein, including, but not limited to:
3.1.4.1		As detailed within Section 4.1, Evaluation Factor No. 1, herein, Demonstrated Evidence of ABILITY to PERFORM THE WORK , including, but not limited to: (a) Qualifications, experience, and expertise of each team member assigned to the project (principals and primary staff); and (b) Current project load and capacity of the team to effectively manage this project.

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<p>3.1.4.2</p>		<p>As detailed within Section 4.1, Evaluation Factor No. 2, herein, Demonstrated Evidence of PAST SUCCESSFUL EXPERIENCE with mixed-income development and construction of projects of similar scope and size, including, but not limited to:</p> <ul style="list-style-type: none"> (a) Past or current affordable housing projects for a variety of income levels utilizing a variety of housing programs, grant sources (HUD, Choice Neighborhoods, etc.), funding sources such as RAD, LIHTC, HTC, and HUD programs such as Section 18 demolition/disposition; (b) Experience in developing land and mixed-income housing units that utilized innovative and creative approaches; (c) Experience in re-positioning public housing; (d) Past performance in the quality of work, cost control, and compliance with performance schedules and regulatory requirements; and (e) Experience and Knowledge of the local housing market, regulations, and codes, familiarity with federal and local affordable housing programs and the local agencies that administer these programs, including Jacksonville Housing’s Low-Income Housing Tax Credits, Tax-Exempt Bonds, and related state and city agencies (f) Client Listing.
<p>3.1.4.3</p>		<p>As detailed within Section 4.1, Evaluation Factor No. 3, herein, the Degree to which the proposer illustrates the OVERALL VISION for the project, including, but not limited to:</p> <ul style="list-style-type: none"> (a) Evidence the proposer understands the project and the Agency’s goals, whether from experience with similar projects or from preparatory research; (b) The proposer’s proposed project approach addresses the project issues and indicates a good understanding of the Agency’s objectives, the local funding challenges, and resident protections; (c) Business terms proposed by the Developer. (d) Proven ability to work with stakeholders whose interests and redevelopment objectives may differ. (e) Evidence that the proposed team has experience in providing for meaningful resident and community participation throughout the planning and implementation of the development program, including the team’s experience with issues and obstacles related to meaningful resident and community participation.

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3.1.4.4		<p>As detailed within Section 4.1, Evaluation Factor No. 4, herein, the proposer team’s Documented ABILITY to OBTAIN FINANCIAL COMMITMENTS from:</p> <p>(a) Federal, state, and local agencies, private investors, and banks including competitive LIHTC in Florida; and (b) A proven track record of creative and viable financial plans that do not rely principally on the Agency’s funds. (c) Proven ability to maximize private sector participation in the financing of complex residential projects. (d) The advantage of the Business Terms proposed.</p>
3.1.4.5		Provide a detailed property management transition plan to allow the Agency to manage the property within 5 years of the development achieving stabilization.
3.1.4.6		Detail the approach to the division of work listed above and within the preceding Section 2.0 herein and the team members responsible for the same. Please provide an organizational chart.
3.1.4.7		Place hereunder full detail as to how the firm, if chosen, will address any of the requirements detailed within the preceding Section 2.0 herein.
3.1.4.8		How will property management staff be retained, screened, trained, and monitored?
3.1.4.9		The proposed quality assurance program.
3.1.4.10		An explanation and samples of forms that will be used during both the development and property management phases and reports that will be submitted and the method of such reports (i.e., written; fax; internet; etc.).
3.1.4.11		A complete description of the products and services the firm provides.
3.1.5	5	<p>Managerial Capacity/Financial Viability/Staffing Plan. The proposer entity must submit under this tab a concise description of its managerial and financial capacity to deliver the proposed services, including brief professional resumes for the persons identified within areas (5) and (6) of Attachment C, <i>Profile of Firm Form</i>. Such information shall include the proposer’s qualifications to provide the services; a description of the background and current organization of the firm (including a current organizational chart). Please provide two years of financial statements.</p>
3.1.6	6	<p>Client Information. The proposer shall submit a listing of former or current clients, including Public Housing Authorities, for whom the proposer has performed similar or like services to those being proposed herein. The listing shall, at a minimum, include:</p>
3.1.6.1		The client’s name;
3.1.6.2		The client’s contact name;
3.1.6.3		The client’s telephone number and e-mail address;
3.1.6.4		A brief narrative description and scope of the service(s) and the dates the services were/are provided.

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3.1.7	7	Equal Employment Opportunity/Supplier Diversity. The proposer must submit under this tab a copy of its Equal Opportunity Employment Policy and a complete description of the positive steps it will take to ensure compliance, to the greatest extent feasible, with the regulations detailed within the following Section 3.6 herein pertaining to supplier diversity (i.e., small, minority-, and women-owned businesses).
3.1.8	8	Subcontractor/Joint Venture Information (Optional Item). The proposer shall identify hereunder whether or not he/she intends to use any subcontractors for this job, if awarded, and/or if the proposal is a joint venture with another firm. Please remember that all information required from the proposer under the proceeding tabs must also be included for any major subcontractors (10% or more) or from any joint venture.
3.1.9	9	Other Information (Optional Item). The proposer may include hereunder any other general information that the proposer believes is appropriate to assist the Agency in its evaluation.
3.1.10	10	Business Terms. A fully completed copy of Attachment H, Business Terms, attached hereto.
3.1.11	11	Proposed Percentages and Incentives. <i>Each proposer shall submit, unfolded within a separate sealed envelope</i> , the following: As the Agency is vested in the development activities as a Developer, the Agency is therefore keenly interested in a financial structure that provides a stream of income for the development activities. Accordingly, the developer shall include the proposed financial aspects that address: (1) How predevelopment costs will be handled; (2) How developer fees will be shared (including the responsibility of deferred fees); and (3) Any other financial incentives to the Agency. NOTE: As detailed within the 1 st sentence of this Section, this information will not actually be submitted under a "Tab No. 11." Failure on the part of a proposer to not submit this information as instructed shall allow the Agency to not consider such proposer to be responsive (such decision shall be at the Agency's discretion).
3.1.12	No Information Placed under a Tab. If no information is to be placed under any of the above noted tabs (especially the "Optional" tabs), please place there under a statement such as "NO INFORMATION IS BEING PLACED UNDER THIS TAB" or "THIS TAB LEFT INTENTIONALLY BLANK." <u>DO NOT</u> eliminate any of the tabs.	
3.1.13	Proposal Submittal Binding Method. It is preferable and recommended that the proposer bind the proposal submittals in such a manner that the Agency can, if needed, remove the binding (i.e., "comb-type" etc.) or remove the pages from the cover (i.e. 3-ring binder; etc.) to make copies, then conveniently return the proposal submittal to its original condition.	

3.2 No Fees Proposed. No fees shall be discussed or proposed, either verbally or in writing, during the RFQ competitive solicitation process. The Agency will, as detailed within the following Sections 4.0 and 5.0 herein, negotiate such fees with the top-rated proposer. As may be detailed herein, if the Agency makes an award to one firm only, in such case the Agency does not guarantee any minimum or maximum amount of work as a result of any award ensuing from this RFQ but will reserve the right to award any amount of work on an as-needed basis.

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3.2.1 No Deposit/No Retainer. The Agency will NOT pay any deposits or retainer fees as a result of an award of the ensuing contract. This means that the Agency will pay the successful proposer(s) for actual work performed only.

3.3 Proposal Submission. All pricing must be entered, where provided for within the Marketplace and all “hard-copy” proposals must be submitted and time-stamped received in the designated Agency office by no later than the submittal deadline stated herein (or within any ensuing addendum). A total of 1 original signature copy (marked “ORIGINAL”) and 3 exact copies, marked as “COPIES” (each of the 4 separate proposal submittals shall have a cover and extending tabs) of the “hard copy” proposal submittal, shall be placed unfolded in a sealed package and addressed to:

**Jacksonville Housing Authority
Attention: Colene S. Orsini, Procurement Supervisor
1300 Broad St. N. Jacksonville, FL 32202**

3.3.1 Labeling Proposal Package. The package exterior must clearly denote the above-noted RFQ number and must have the proposer’s name and return address. Proposals received after the published deadline will not be accepted.

3.3.2 Submission Conditions. DO NOT FOLD OR MAKE ANY ADDITIONAL MARKS, NOTATIONS, OR REQUIREMENTS ON THE DOCUMENTS TO BE SUBMITTED! Proposers are not allowed to change any requirements or forms contained herein, either by making or entering onto these documents or the documents submitted any revisions or additions; and if any such additional marks, notations, or requirements are entered on any of the documents that are submitted to the Agency by the proposer, such may invalidate that proposal. If, after accepting such a proposal, the Agency decides that any such entry has not changed the intent of the proposal that the Agency intended to receive, the Agency may accept the proposal and the proposal shall be considered by the Agency as if those additional marks, notations, or requirements were not entered on such. By accessing the eProcurement Marketplace, registering, and downloading these documents, each prospective proposer that does so is thereby agreeing to confirm all notices that the Agency delivers to him/her as instructed, and by submitting a proposal, the proposer is thereby agreeing to abide by all terms and conditions published herein and by addendum pertaining to this RFQ.

3.3.3 Submission Responsibilities. It shall be the responsibility of each proposer to be aware of and to abide by all dates, times, conditions, requirements, and specifications set forth within all applicable documents issued by the Agency, including the RFQ document, the documents listed within the following Section 3.7 herein, and any addenda and required attachments submitted by the proposer. By virtue of completing, signing, and submitting the completed documents, the proposer is stating his/her agreement to comply with all conditions and requirements set forth within those documents. Written notice from the proposer not authorized in writing by the CO to exclude any of the

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Agency requirements contained within the documents may cause that proposer to not be considered for award.

3.4 Proposer’s Responsibilities — Contact with the Agency. It is the responsibility of the proposer to address all communication and correspondence pertaining to this RFQ process to the CO only. Proposers must not make inquiries or communicate with any other Agency staff member or official (including members of the Board of Commissioners) pertaining to this RFQ. Failure to abide by this requirement may be cause for the Agency to not consider a proposal submittal received from any proposer who may not have abided by this directive.

3.4.1 Addenda. All questions and requests for information must be addressed in writing to the CO. The CO will respond to all such inquiries in writing by an addendum to all prospective proposers (i.e., firms or individuals that have obtained the RFQ Documents). During the RFQ solicitation process, the CO will NOT conduct any *ex parte* (a substantive conversation— “substantive” meaning, when decisions pertaining to the RFQ are made—between the Agency and a prospective proposer when other prospective proposers are not present) conversations that may give one prospective proposer an advantage over other prospective proposers. This does not mean that prospective proposers may not call the CO—it simply means that other than making replies to direct the prospective proposer where his/her answer has already been issued within the solicitation documents, the CO may not respond to the prospective proposer’s inquiries but will direct him/her to submit such inquiry in writing so that the CO may more fairly respond to all prospective proposers in writing by addendum.

3.5 Proposer’s Responsibilities — Equal Employment Opportunity and Supplier Diversity. Both the Contractor and the Agency have, pursuant to HUD regulation, certain responsibilities pertaining to the hiring and retention of personnel and subcontractors.

3.5.1 Within 2 CFR §200.321 it states:

3.5.1.1 Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms.

3.5.1.2 (a) The non-federal entity must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

3.5.1.3 (2) Affirmative steps must include:

3.5.1.3.1 (1) Placing qualified small and minority businesses and women's business enterprises on solicitation lists;

3.5.1.3.2 (2) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;

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- 3.5.1.3.3 (3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority business, and women's business enterprises;
- 3.5.1.3.4 (4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;
- 3.5.1.3.5 (5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and
- 3.5.1.3.6 (6) Requiring the prime contractor if subcontracts are to be let, to take the affirmative steps listed in paragraphs (1) through (5) of this section.

3.5.2 Within **HUD Procurement Handbook 7460.8 REV 2** it states:

- 3.5.2.1 **Section 15.5.A, Required Efforts.** Consistent with Presidential Orders 11625, 12138, and 12432, the [Agency] shall make every effort to ensure that small businesses, MBEs, WBEs, and labor surplus area businesses participate in [Agency] contracting.
- 3.5.2.2 **Section 15.5.B, Goals.** [The Agency] is encouraged to establish goals by which they can measure the effectiveness of their efforts in implementing programs in support of . . . contracting with disadvantaged firms. It is important to ensure that the means used to establish these goals do not have the effect of limiting competition and should not be used as mandatory set-aside or quota, except as may otherwise be expressly authorized in regulation or statute. Some localities have adopted minority contracting set-aside policies or geographic limitations, which may be in conflict with Federal requirements for full and open competition.

3.5.3 Within our **Agency Procurement Policy** it states that our Agency will:

- 3.5.3.1 **Assistance to Small and Other Business, Required Efforts:**
 - 3.5.3.1.1 Including such firms, when qualified, on solicitation mailing lists;
 - 3.5.3.1.2 Encouraging their participation through direct solicitation of proposals or proposals whenever they are potential sources;

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- 3.5.3.1.3 Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by such firms;
- 3.5.3.1.4 Establishing delivery schedules, where the requirement permits, which encourage participation by such firms;
- 3.5.3.1.5 Using the services and assistance of the Small Business Administration, and the Minority Business Development Agency of the Department of Commerce;
- 3.5.3.1.6 Requiring prime contractors when subcontracting is anticipated, to take the positive steps listed above.

3.5.4 Requirements. Accordingly, please see Section 3.1.7 within Table No. 4 herein which details the information pertaining to this issue that the proposer must submit in response to this proposal showing compliance, to the greatest extent feasible, with these regulations.

3.6 Pre-proposal Conference. The scheduled pre-proposal conference identified on Table 2 of this document, pursuant to HUD regulation, is not mandatory but highly suggested. Many prospective proposers have previously responded to an RFP with a multi-tabbed submittal and feel comfortable in doing so without attending the pre-conference. Typically, such conferences last 1 hour or less, though such is not guaranteed. The purpose of this conference is to assist prospective proposers to have a full understanding of the RFP documents so that he/she feels confident in submitting an appropriate proposal; therefore, at this conference the JHA will conduct a brief overview of the RFP documents, including the attachments. Prospective proposers may also ask questions, though the CO may require that some such questions are delivered in writing prior to a response being delivered. Whereas the purpose of this conference is to review the RFP documents, attendees should bring a copy of the RFP documents to this conference; the JHA will not distribute any copies of the RFP documents at this conference.

3.7 Recap of Attachments. It is the responsibility of each proposer to verify that he/she has downloaded the following attachments pertaining to this RFQ, which are hereby, by reference, included as a part of this RFQ:

[Table No. 5]

(1) RFQ Section	(2) Documen t No.	(3) Attachment	(4) Attachment Description
3.7.1	1.0		This RFQ Document
3.7.2	2.0	A	Form of Proposal
3.7.2.1		A1	Florida E-Verify Affidavit
3.7.3	3.0	B	form HUD-5369-C (8/93), <i>Certifications and Representations of Offerors, Non-Construction Contract</i>
3.7.4	4.0	C	Profile of Firm Form

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3.7.5	5.0	D	Section 3 Explanation
3.7.6	6.0	E	form HUD-5369-B (8/93), <i>Instructions to Offerors, Non-Construction</i>
3.7.7	7.0	F	<i>Supplemental Instructions to Proposers & Contractors (SIPC)</i>
3.7.8	8.0	G	Sample Contract Form (please note that this contract and the listed appendices are being given as a sample only—the Agency reserves the right to revise any clause herein and/or to include within the ensuing contract any additional clauses that the Agency feels it is in its best interests to do so)
3.7.8.1	8.1	G1	Sample Contract Appendix No. 1: form HUD-5370-C (01/2014), <i>General Conditions for Non-Construction Contracts Section I (With or without Maintenance Work)</i>
3.7.8.2	8.2	G2	Sample Contract Appendix No. 2: form HUD 50071 (01/14), <i>Certification of Payments to Influence Federal Transactions</i> (NOTE: This form will only be completed and included as a part of the ensuing contract if the Agency anticipates that total awards pursuant to the ensuing contract may or will exceed \$100,000.)
3.7.8.3	8.3	G3	Sample Contract Appendix No. 3: Standard Form LLL (Rev. 01/14), <i>Disclosure of Lobbying Activities</i> (NOTE: This form will typically only be completed and included as a part of the ensuing contract if the Contractor designates an affirmative answer to Item No. (2) within the immediate identified form 50071.)
3.7.9	9.0	H	<i>Business Terms</i>

4.0 PROPOSAL EVALUATION.

4.1 Evaluation Factors. The following factors will be utilized by the Agency to evaluate each proposal submittal received; the award of points for each listed factor will be based upon the documentation that the proposer submits within his/her proposal submittal and online (specifically, the pricing submitted online):

[Table No. 6]

(1) No.	(2) Max Point Value	(3) Factor Type	(4) Factor Description
1	20 points	Subjective (Technical)	Demonstrated Evidence of ABILITY to PERFORM THE WORK , including, but not limited to:

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			<p>(a) Qualifications, experience, and expertise of each team member assigned to the project (principals and primary staff); and</p> <p>(b) Current project load and capacity of team to effectively manage this project.</p>
2	30 points	Subjective (Technical)	<p>Demonstrated Evidence of PAST SUCCESSFUL EXPERIENCE with mixed-income development and construction of projects of similar scope and size, including, but not limited to:</p> <p>(a) Past or current affordable housing projects for a variety of income levels utilizing a variety of housing programs, grant sources (HUD, Choice Neighborhoods, etc.), funding sources such as RAD, LIHTC, HTC, ad HUD programs such as Section 18 demolition/disposition;</p> <p>(b) Experience in developing land and mixed-income housing units that utilized innovative and creative approaches;</p> <p>(c) Experience in re-positioning public housing;</p> <p>(d) Past performance in quality of work, cost control, and compliance with performance schedules and regulatory requirements; and</p> <p>(e) Experience and Knowledge of the local housing market, regulations and codes, familiarity with federal and local affordable housing programs and the local agencies that administer these programs, including Florida Housing’s Low Income Housing Tax Credits, Tax Exempt Bonds, and related state and city agencies</p> <p>(f) Client Listing.</p>
3	20 points	Subjective (Technical)	<p>Degree to which the proposer illustrates the OVERALL VISION for the project, including, but not limited to:</p> <p>(a) Evidence the proposer understands the project and the Agency’s goals, whether from experience with similar projects or from preparatory research;</p> <p>(b) The proposer’s proposed project approach addresses the project issues and indicates a good understanding of the Agency’s objectives, the local funding challenges, and resident protections;</p> <p>(c) Business terms proposed by the Developer.</p> <p>(d) Proven ability to work with stakeholders whose interests and redevelopment objective may differ.</p> <p>(e) Evidence that the proposed team has experience in providing for meaningful resident and community participation throughout the planning and implementation of the development program, including the team’s experience</p>

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			with issues and obstacles related to meaningful resident and community participation.
4	20 points	Subjective (Technical)	The proposer team's Documented ABILITY to OBTAIN FINANCIAL COMMITMENTS from: (a) Federal, state, and local agencies, private investors, and banks including competitive LIHTC in Florida; and (b) A proven track record of creative and viable financial plans that do not rely principally on the Agency's funds. (c) Proven ability to maximize private sector participation in the financing of complex residential projects. (d) The advantage of the Business Terms proposed.
5	10 points	Subjective (Technical)	The OVERALL QUALITY, ORGANIZATION, and PROFESSIONAL APPEARANCE of the PROPOSAL SUBMITTED , based upon the opinion of the evaluators.
	100 points		Total Points (other than preference points)
*NOTE: Points will be awarded for each Subjective Factor by each of the appointed evaluation committee members based on his/her opinion after a thorough review of the information submitted by each proposer within his/her proposal.			

4.2 Evaluation Method. The eventual award will occur based on the following detailed brief procedures.

4.2.1 Initial Evaluation for Responsiveness. Each proposal received will first be evaluated for responsiveness (i.e. meets the minimum of the requirements). NOTE: Please reference Section 3.1 herein.

4.2.2 Evaluation Packet. An evaluation packet will be prepared for each evaluator, typically including the following documents:

- 4.2.2.1** Instructions to Evaluators;
- 4.2.2.2** Proposal Tabulation Form;
- 4.2.2.3** Written Narrative Form for each proposer;
- 4.2.2.4** Recap of each proposer's responsiveness;
- 4.2.2.5** Copy of all pertinent RFQ documents.

4.2.3 Evaluation Committee. The Agency anticipates that it will select a minimum of a three-person committee to evaluate each of the responsive "hard copy" proposals submitted in response to this RFQ. PLEASE NOTE: No proposer shall be informed at any time during or after the RFQ process as to the identity of any evaluation committee member. If, by chance, a proposer does become aware of the identity of such person(s), he/she SHALL NOT make any attempt to contact or discuss with such person anything related to this RFQ. As detailed within Section 3.4 of this document, the designated CO is the only person at the Agency that the proposers shall contact pertaining to this RFQ. Failure to abide

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by this requirement may (and most likely will) cause such proposer(s) to be eliminated from consideration for award.

4.2.4 Evaluation. The CO will evaluate and award points pertaining to Evaluation Factor No. 6 (the “Objective” Factor). The appointed evaluation committee, independent of the CO or any other person at the Agency, shall evaluate the responsive proposals submitted and award points pertaining to Evaluation Factors No. 1 through No. 5 (the “Subjective” Factors). Upon final completion of the proposal evaluation process, the evaluation committee will forward the completed evaluations to the CO.

4.2.4.1 Points Awarded Range. Pertaining to the Subjective Factors, please note the following range of points awarded (points pertaining to this RFQ are shaded—please also see the Evaluation Factors detailed within the preceding Section 4.1):

[Table No. 7]

Points Awarded Range						
Classification*	Rating	%	10	20	30	100**
Acceptable	Excellent	95%/+	10	19-20	19-20	95-100
Acceptable	Very Good	90%/+	9	18	18	90-94
Potentially Acceptable	Good	80%/+	8	16-17	16-17	80-89
Potentially Acceptable	Average	70%/+	7	14-15	14-15	70-79
Unacceptable	Poor	<70%	0-6	0-13	0-13	0-69
*Pursuant to Section 7.2.N.3 of HUD Procurement Handbook 7460.8 REV 2.						
**Total available points to be awarded, including cost points, minus preference points.						

4.2.5 Potential "Competitive Range" or "Best and Finals" Negotiations. The Agency reserves the right to, as detailed within Section 7.2.N through Section 7.2.R of HUD Procurement Handbook 7460.8 REV 2, conduct a “Best and Finals” Negotiation, which may include oral interviews, with all firms deemed to be in the competitive range. Any firm deemed not to be in the competitive range shall be notified of such in writing by the Agency in as timely a manner as possible, but in any case within no longer than 10 days after the beginning of such negotiations with the firms deemed to be in the competitive range.

4.2.6 Determination of Top-ranked Proposer. Typically, the subjective points awarded by the evaluation committee will be combined with the objective points awarded by the CO to determine the final rankings. If the evaluation was performed to the satisfaction of the CO, the final rankings may be forwarded to the Housing Authority Board of Commissioners (BOC) at a scheduled meeting for approval. Contract negotiations may, at the Agency's option, be conducted prior to or after the BOC approval.

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4.2.6.1 Minimum Evaluation Results. To be considered to receive an award a proposer must receive a total calculated average of at least 70 points (of the 115 total possible points detailed within Section 4.1 herein).

4.2.6.2 Ties. In the case of a tie in points awarded, the award shall be decided as detailed within Section 6.12.C of HUD Procurement Handbook 7460.8 REV 2, by “drawing lots or other random means of selection.”

4.2.7 Notice of Results of Evaluation. If an award is completed, all proposers will receive by e-mail a Notice of Results of Evaluation. Such notice shall inform all proposers of:

4.2.7.1 Which proposer received the award;

4.2.7.2 Where each proposer placed in the process as a result of the evaluation of the proposals received;

4.2.7.3 The cost or financial offers received from each proposer;

4.2.7.4 Each proposer’s right to a debriefing and to protest.

4.2.8 Restrictions. All persons having familial (including in-laws) and/or employment relationships (past or current) with principals and/or employees of a proposer entity will be excluded from participation on the Agency evaluation committee. Similarly, all persons having ownership interest in and/or contract with a proposer entity will be excluded from participation on the Agency evaluation committee.

5.0 CONTRACT AWARD.

5.1 Contract Award Procedure. If a contract is awarded pursuant to this RFQ, the following detailed procedures will be followed:

5.1.1 By completing, executing and submitting a proposal, the “proposer is thereby agreeing to abide by all terms and conditions pertaining to this RFQ as issued by the Agency, either in hard copy or on the Marketplace” including the contract clauses already attached as Attachments G and G-1 through G-3, each attached hereto. Accordingly, the Agency has no responsibility to conduct after the submittal deadline any negotiations pertaining to the contract clauses already published.

5.2 Contract Conditions. The following provisions are considered mandatory conditions of any contract award made by the Agency pursuant to this RFQ:

5.2.1 Contract Form. The Agency will not execute a contract on the Contractor’s form—contracts will only be executed on the Agency form (please see Sample Contract, Attachments G and G-1 through G-3, each attached hereto), and by submitting a proposal the Contractor agrees to do so (please note that the

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Agency reserves the right to amend this form as the Agency deems necessary). However, the Agency will during the RFQ process (prior to the posted question deadline) consider any contract clauses that the proposer wishes to include therein and submits in writing a request for the Agency to do so; but the failure of the Agency to include such clauses does not give the Contractor the right to refuse to execute the Agency's contract form. It is the responsibility of each prospective proposer to notify the Agency, in writing, prior to submitting a proposal, of any contract clause that he/she is not willing to include in the final executed contract and abide by. The Agency will consider and respond to such written correspondence, and if the prospective proposer is not willing to abide by the Agency's response (decision), then that prospective proposer shall be deemed ineligible to submit a proposal.

5.2.1.1 Mandatory HUD Forms. Please note that the Agency has no legal right or ability to (and will not) at any time negotiate any clauses contained within ANY of the HUD forms included as a part of this RFQ.

5.2.2 Assignment of Personnel. The Agency shall retain the right to demand and receive a change in personnel assigned to the work if the Agency believes that such change is in the best interest of the Agency and the completion of the contracted work.

5.2.3 Unauthorized Sub-contracting Prohibited. The Contractor shall not assign any right, nor delegate any duty for the work proposed pursuant to this RFQ (including, but not limited to, selling or transferring the contract) without the prior written consent of the ED. Any purported assignment of interest or delegation of duty, without the prior written consent of the ED shall be void and may result in the cancellation of the contract with the Agency, or may result in the full or partial forfeiture of funds paid to the Contractor as a result of the proposed contract; either as determined by the ED.

5.3 Contract Period. The Agency anticipates that it will initially award a contract for the period of 1 year with the option, at the Agency's discretion, of 4 additional one-year option periods, for a total maximum contract period of 5 years.

5.4 Licensing and Insurance Requirements. Prior to award (but not as a part of the proposal submission) the successful proposer will be required to provide:

5.4.1 Workers Compensation Insurance. An original certificate evidencing the proposer's current industrial (worker's compensation) insurance carrier and coverage amount (NOTE: Workers Compensation Insurance will be required of any Contractor that has employees other than just the owner working on-site to provide the services);

5.4.2 General Liability Insurance. An original certificate evidencing General Liability coverage, naming the Agency as an additional insured, together with the appropriate endorsement to said policy reflecting the addition of the Agency as an additional insured under the said policy (minimum of \$1,000,000 each

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occurrence, the general aggregate minimum limit of \$1,000,000, together with damage to premises and fire damage of \$50,000 and medical expenses any one person of \$5,000), with a commercially reasonable deductible (i.e., “commercially reasonable,” meaning not greater than 1% of the “general aggregate minimum” of the policy, with a maximum deductible amount of \$50,000);

5.4.3 Professional Liability Insurance. An original certificate showing the proposer's professional liability and/or "errors and omissions" coverage (minimum of \$1,000,000 each occurrence, general aggregate minimum limit of \$1,000,000), with a commercially reasonable deductible (i.e., “commercially reasonable,” meaning not greater than 1% of the “general aggregate minimum” of the policy, with a maximum deductible amount of \$50,000);

5.4.4 Automobile Insurance. An original certificate showing the proposer's automobile insurance coverage in a combined single limit of \$1,000,000. For every vehicle utilized during the term of this program, when not owned by the entity, each vehicle must have evidence of automobile insurance coverage with limits of no less than \$50,000/\$100,000 and medical pay of \$5,000.

5.4.5 City/County/State Business License. If applicable, a copy of the proposer’s business license allowing that entity to provide such services within the City of Lynchburg and/or the State of Florida.

5.4.6 Profile of Firm Form. The requested related information shall also be entered where provided for on the Profile of Firm Form (DO NOT ATTACH SUBMIT COPIES WITHIN THE PROPOSAL SUBMITTAL—we will garner the necessary certificates from the Contractor prior to contract execution).

5.5 Contract Service Standards. All work performed pursuant to this RFQ must conform and comply with all applicable local, state, and federal codes, statutes, laws, and regulations.

5.6 Prompt Return of Contract Documents. Any and all documents required to complete the contract, including contract signature by the successful proposers, shall be provided to the Agency within 10 workdays of notification by the Agency.

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