

REQUEST FOR PROPOSALS



Development of Affordable Housing in Phoenix Heights, Tucker Hill and Other Sites

RFP# RVS/17-025
REQUEST FOR PROPOSALS

ISSUE DATE: May 16, 2017

TITLE: Development of Affordable Housing in Phoenix Heights, Tucker Hill and Other Sites

DUE: June 15, 2017, no later than 2:00 PM EST

ISSUING OFFICE: City of Ocala Procurement Department, Maria Tomlin, Senior Buyer, 110 SE Watula Avenue, 3rd Floor, Ocala, Florida, 34471, mtomlin@ocalafl.org.

The City will receive submittals until the time and date cited above. Only submittals received electronically on www.bidocala.com by the correct time and date will be recorded. Proposer is to upload one (1) electronic, complete submittal package on www.bidocala.com for evaluation use.

Anti-Collusion Statement/Public Domain

I, the submitting Proposer, have not divulged, discussed, or compared this Request for Proposals with any other Proposer and have not colluded with any other Proposer in the preparation of this proposal in order to gain an unfair advantage in the award of this contract. I acknowledge all information contained herein is part of the public domain as defined in the Public Records Act, Chapter 119, F.S.

1. GENERAL INFORMATION

- 1.1 This is a Request for Proposals to the City of Ocala.
- 1.2 The City of Ocala is seeking proposals from for-profit and non-profit developers/organizations to design and build attached, or detached, rental housing units for low income households in the Phoenix Heights and Tucker Hill neighborhoods, as well as other City-Owned properties as they come available. The developer/organization shall be responsible for managing the rental units for a minimum of 20 years.
- 1.3 The firm selected shall enter into an agreement with the City for the items noted in the scope of work.

- 1.4 All terms and conditions of this request, any addenda, proposer's submissions and future negotiated terms are incorporated into the contract by reference as set forth herein.
- 1.5 All dates and information contained herein may be extended, changed, or updated within the listing at www.bidocala.com. **Proposers are responsible for verifying all listing information before submitting a proposal to the RFP.**

2. INSTRUCTIONS TO RESPONDING FIRMS:

- 2.1 All proposals must be uploaded no later than **2:00 p.m.** on **June 15, 2017**, at www.bidocala.com under the appropriate listing.
- 2.2 The City will not accept proposals sent by U.S. Mail or private couriers.
- 2.3 Any proposals received after the stated time and date will not be considered.
- 2.4 Proposers are encouraged to submit a proposal by the Proposal Deadline. The proposal will note the responsible office for the proposer with contact person, phone and email address.
- 2.5 **Selection may be made directly from the Request for Proposals.** Some, or all, of the responding firms may be requested to provide written or oral technical proposals, or both, for the ranking process. After the ranking of the proposers, the contract will be negotiated in accordance with Florida Statutes. Funding on all projects is subject to approval.
- 2.6 Proposer should become familiar with any local conditions which may, in any manner, affect the services required. The proposer is required to carefully examine the Scope of Services and to become thoroughly familiar with any and all conditions and requirements that may in any manner affect the work to be performed under the contract. No additional allowance will be made due to lack of knowledge of these conditions.
- 2.7 Proposals not conforming to the instructions provided herein will be subject to disqualification at the sole option of the City.
- 2.8 All materials submitted as response to this RFP shall become the property of the City.

3. TIME SCHEDULE

3.1 The City will attempt to use the following time schedule which will result in selection of a Proposer.

Description	Date
Mandatory Pre-Proposal Meeting at 2:00 PM	June 1, 2017
All written questions and inquiries are due by 5:00 PM EST	June 9, 2017
Proposals due no later than 2:00 PM EST	June 15, 2017
Evaluation Committee Meeting	TBD
Shortlisted Firms- Interviews/Presentations	TBD, if necessary
City Council Approval Date	TBD

NOTE: These dates are estimated dates only and subject to change.

3.2 Mandatory Pre-Proposal Meeting

There will be a pre-proposal meeting and site visit scheduled for this project on **June 1, 2017 at 2:00 p.m.** at the City of Ocala Customer Service Center Training Room, located at 201 SE 3rd Street, 2nd Floor, Ocala, FL 34471.

- A. This is a **mandatory** meeting and site visit therefore; proposal submission will be contingent upon attendance at this meeting and the subsequent site visit.
- B. Questions and requests for clarification regarding this Request for Proposal must be submitted electronically via www.bidocala.com. Responses will be made electronically and posted online. It is the responsibility of the proposers to check for updates.

3.3 Proposers to this request or persons acting on their behalf may not contact, between the release of the request and the end of the five (5) day protest period following the agency posting the notice of intended award, excluding Saturdays, Sundays and state holidays, any employee or officer of the City concerning any aspect of this solicitation, except in writing to the procurement officer or as provided in the solicitation documents. Violation of this provision may be grounds for rejecting a proposal.

4. AWARD

4.1 The City reserves the right to accept or reject any or all proposals.

4.2 The City reserves the right to waive any irregularities and technicalities and may, at its sole discretion, request a clarification or other information to evaluate any or all proposals.

- 4.3 The City reserves the right, before awarding the contract, to require the proposer to submit evidence of qualifications or any other information that may be deemed necessary.
- 4.4 The City reserves the right, prior to City Council approval, to cancel the contract or portions thereof, without penalty.
- 4.5 The City reserves the right to negotiate with the highest rated proposer. If an agreement cannot be reached with the highest rated proposer, the City reserves the right to negotiate and recommend award to the next highest proposer or subsequent proposer until an agreement is reached.

5. INQUIRIES

- 5.1 Any questions concerning conditions and specifications must be submitted electronically via www.bidocala.com and received no later than close of business, June 9, 2017. Questions received within the required timeframe will be answered via www.bidocala.com.
- 5.2 If necessary, an addendum will be posted on the www.bidocala.com website.
- 5.3 It is our standard policy that no addendum will be issued later than three (3) calendar days prior to the date for receipt of proposals, except an addendum withdrawing the request for proposals or one which includes postponement of the date for receipt of proposals.
- 5.4 No verbal or written information which is obtained other than by information in this document or by addendum to this request will be binding on the City.

6. LOBBYING

- 6.1 PROPOSERS ARE HEREBY ADVISED THAT CONTACT IS NOT PERMITTED WITH ANY CITY PERSONNEL OR BOARD MEMBER RELATED TO, OR INVOLVED WITH THIS REQUEST. ALL ORAL OR WRITTEN INQUIRIES MUST BE DIRECTED THROUGH THE ASSIGNED PROCUREMENT PERSONNEL.
- 6.2 LOBBYING IS DEFINED AS ANY ACTION TAKEN BY AN INDIVIDUAL, FIRM, ASSOCIATION, JOINT VENTURE, PARTNERSHIP, SYNDICATE, CORPORATION, AND ALL OTHER GROUPS WHO SEEK TO INFLUENCE THE GOVERNMENTAL DECISION OF A CITY COUNCIL MEMBER OR ANY CITY PERSONNEL AFTER ADVERTISEMENT AND PRIOR TO THE CITY COUNCIL VOTE ON THE AWARD OF THIS CONTRACT.

- 6.3 ANY PROPOSER WHO IS ADVERSELY AFFECTED BY THE RECOMMENDED AWARD MAY FILE A PROTEST WITHIN THE TIME PRESCRIBED IN CITY POLICY. FAILURE TO POST BOND WITH THE CITY OR TO ADHERE STRICTLY TO THE REQUIREMENTS OF STATUTES AND CITY OF OCALA RULES PERTAINING TO PROTESTS WILL RESULT IN SUMMARY DISMISSAL BY THE CHIEF FINANCIAL OFFICER FOR THE CITY.
- 6.4 ANY PROPOSER OR ANY INDIVIDUALS THAT LOBBY ON BEHALF OF PROPOSER DURING THE TIME SPECIFIED WILL RESULT IN REJECTION / DISQUALIFICATION OF SAID REQUEST FOR PROPOSALS.

7. **PREPARATION AND SUBMISSION**

Proposer's response shall be **no more than thirty (30) pages**, *excluding* front covers, a cover letter of up to two (2) pages, required statements and response forms, qualification letters, and certificates. Proposals failing to provide sufficient information and assurances of performance to accurately assess each category of the required services which fail to comply with the requirements and conditions of the Request for Proposals will not be given further consideration.

At a minimum, the proposal shall include the following sections:

- A. **Proposer Information and Contact:** Name of the Proposer, address, Project Manager, telephone, email address and taxpayer ID number. Include a brief history of the firm.
- B. **Project Approach and Financing Plan:** This section provides the Proposer's teams approach and financing plan for providing services. Include an organization chart showing proposed relationship among Proposer staff as well as any other parties that may have significant role in the delivery of this project. For Phoenix Heights, show how the proposed development will address streets, open space and surrounding development. Describe how long the units will remain income restricted. Indicate your plan of work, recommended schedules, and suggested responsibility assignments. Outline your plan for management and marketing of the rental units for the duration of the 20-year period of affordability.
- C. **Proposed Project Schedule:** Include your proposed project schedule, identifying any critical paths, to accomplish the Scope of Work.
- D. **Design and Materials:** Elevations or renderings of exteriors and interiors of buildings. Outline the proposed design, materials to be used, and density. Include any proposed energy improvements and accessibility features.

- E. **Feasibility and Cost:** Discuss the estimated project cost, revenue/funding sources, and value. Expand on the feasibility aspects of the project including: public purpose; readiness of project to proceed; timeframe; and risk.
- F. **Qualifications and Experience:** Provide qualifications, resumes, and experience of the team in developing and operating/managing affordable housing projects. Emphasize the specific qualifications and experience from successfully completed and operated projects similar to this project for the key team members. Qualifications and experience should include: construction and development of affordable housing project; detailed management experience; familiarity with funding sources; background in financing affordable housing; references; and project descriptions. List any awards or recognition received on housing projects, if applicable.
- G. **References:** Submit a minimum of three (3) references with names, titles, mailing addresses, email addresses, telephone numbers, and the project description. References should be from recent work performed similar to what is being proposed.
- H. **Staffing Plan:** Discuss staffing plan, workload, both current and anticipated, for all key team members, and their capacity to perform the requested services according to the proposed schedule. Discuss the Firm's/Team's approach for completing the services required for this project within the estimated budget/cost and schedule. Specify the names of the persons who will be authorized to give and support information, both in writing and oral presentation, for your company. Provide their titles, addresses and telephone numbers.
- I. **Quality Control and Assurance:** Discuss quality assurance and quality control proposed for the design phase of this project, including compliance with federal and state requirements.
- J. **Additional Relevant Information:** Please include any other information your company believes to be relevant in performance of this project.

8. PROPOSAL EVALUATION PROCESS

- 8.1 The Selection Committee will be comprised of, at a minimum, three (3) members from various and appropriate City departments.
- 8.2 All proposals received by the submission deadline will be reviewed by the Buyer or designee for responsiveness. Proposals will be distributed to the Selection Committee members for review.

8.3 The committee members will independently score and rank each responsive proposal received in accordance with the evaluation criteria in Section 9.0 below. During the Selection Committee meeting, the committee members will review the proposals and will submit their rankings of all proposals to the Buyer for compilation of the overall ranking to determine a shortlist or intended awardee.

At that time, dates will be set for conducting interviews with those firms remaining on the short list if there is not a clear #1 ranking. If shortlisted, firms will be notified either by email and/or telephone of the date and time. Presentation to the selection committee shall be made by the Proposer's project manager and any others who will be directly involved in the development of these projects. Examples of work shall be submitted for review by the committee, and the outline of the oral presentation is requested for better consideration of each firm.

8.4 The Selection Committee will assign ratings in the evaluation and recommendation process in accordance with the evaluation criteria listed in Evaluation Criteria.

8.5 The Selection Committee reserves the right to interview any or all proposers and to require a formal presentation with the key people who will administer and be assigned to work on the contract before recommendation of award. This interview is to be based upon the written letter received.

8.6 The Selection Committee reserves the right to negotiate further terms and conditions, with the highest ranked proposer. If the Selection Committee cannot reach a mutually beneficial agreement with the first selected proposer, the Committee reserves the right to enter into negotiations with the next highest ranked proposer and continue this process until agreement is reached.

8.7 The City has the option to award or reject any or all proposals or contracts resulting from this Request for Proposals.

9. EVALUATION CRITERIA

9.1 The Selection Committee shall rank all proposals received, by ordinal rankings, which meet the submittal requirements. The following factors will be considered in ranking the responsive proposals received. The Committee will select the highest scoring firm to enter into negotiations for a final contract.

Approach, Capability and Track Record**Weight 30%**

- Developer/organization's track record, including whether the developer/organization has successfully completed a similar type project or a project of similar scope and size.
- Capacity to undertake new or additional projects.
- Ability to secure construction financing.
- The developer/organization's approach, plan of work, recommended schedules, and suggested responsibility assignments.
- For Phoenix Heights, show how the proposed development will address streets, open space and surrounding development.
- Indicate your plan of work, recommended schedules, and suggested responsibility assignments.
- Outline your plan for management and marketing of the rental units for the duration of the 20-year period of affordability.

Property Management Experience**20%**

- Property management experience shall include the number of units managed; years of experience; and the number of affordable units managed.

Project Design/Materials**20%**

- Compliance with all requirements outlined in Scope of Work and consistency with the priorities and objectives outlined in this RFP.
- Proposed affordable housing with products/materials that are high quality and consistent with the West Ocala Community Plan and the Ocala 2035 Vision.
- Elevations or renderings of exteriors and interiors of buildings
- Quality of constructed rental units proposed.
- Contribution to the redevelopment efforts in the Phoenix Heights neighborhood as identified in the Ocala 2035 Vision and the West Ocala Community Plan.

Financial and Project Feasibility**20%**

- Individual component costs and revenue sources.
- Total project cost and value to be attained.
- Background in financing affordable rental units as well as committing other resources and opportunities to a community.
- The public purpose of the development, and anticipated time frame to complete the project.

- Familiarity of the various funding sources for housing development and rental subsidies.

Additional Desirable Criteria

10%

- Units that remain income restricted and/or affordable for longer than twenty (20) years.
- Energy improvements that lead to lower, long-term utility costs for occupants of units.
- Features that meet the highest accessibility standards as defined by federal, state and local requirements.
- Leveraging other public and private funding sources.
- Inclusion and identification of the following business enterprises for this project: small businesses, disadvantaged businesses, women owned businesses, or minority owned businesses.

10. CONFLICT OF INTEREST

10.1 All proposers must disclose the name of any officer, director, or agent who is also an employee of the City. All proposers must disclose the name of any employee, from the aforementioned agency who owns, directly or indirectly, any interest in the Proposer's business or any of its branches.

10.2 All firms must list all and any affiliations they have with other firms.

10.3 The award hereunder is subject to the provisions of Chapter 112, Florida Statutes, as amended, governing conflict of interest. All Bidders must disclose with each bid the name of any officer, director or agent who is also a public employee. Further, all Bidders must disclose the name of any public employee who owns directly or indirectly an interest of five percent (5%) or more in the Bidder's firm or any of its branches. City of Ocala municipal employees, appointed persons, and elected officials (herein referred to as "employees") may engage in outside activities and hold financial interests subject to the requirements of City of Ocala Employee Handbook regulations, state law, and federal regulations and law, if applicable. Every employee who is an officer, director, agent, employee, or owner of a substantial interest in any business entity which does or anticipates doing business with the City of Ocala ("City") must complete an "Officer and Employee Disclosure Statement" and file the statement with the required procurement documents submitted to the respective procurement staff member. A statement must be submitted with every procurement response if the proposer has a disclosure to document. This statement may

be obtained at http://www.ocalafl.org/uploadedFiles/CMO_Services/Purchasing/Officer-Employee-Disclosure-Statement.pdf

11. INDEMNIFICATION CLAUSE

The proposer shall indemnify and hold harmless the City of Ocala and their elected officials, employees and volunteers from and against all claims, damages, losses and expenses, including legal costs, arising out of or resulting from the performance of this contract, provided that any such claim, damage, loss or expenses is attributed to bodily injury, sickness, disease, personal injury or death, or to injury to or destruction of tangible property including the loss or loss of use resulting there from and is caused in whole or in part by any negligent act or omission of the proposer.

12. COST INCURRED IN RESPONDING

All costs directly or indirectly related to Request for Proposals preparation, representation or clarification shall be the sole responsibility of and be borne by the proposer.

13. FEDERAL DEBARMENT

By submitting a proposal, the proposer certifies that no principal (which includes officers, directors, or executives) is presently suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation on this transaction by any Federal Department or Agency.

14. PUBLIC ENTITY CRIMES

A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and may not transact business any public entity in excess of the threshold amount provided in s. 287.017 for CATEGORY TWO(\$35,000) for a period of 36 months following the date of being placed on the convicted vendor list.

15. E-VERIFY

The proposer shall utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired by the proposer during the term of the contract and shall expressly require any subcontractors performing work or providing services pursuant to the state contract to likewise utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired by the subcontractor during the contract term.

16. DAVIS BACON WAGE RATES

Developer/Organization must comply with Davis-Bacon Act. This Act requires contractors to pay their workers on this Project an hourly wage based on classification for the Ocala region. The Wage Determination for this Project can be found at www.wdol.gov/. The applicable county is Marion County, and the construction type is: Residential, FL115, 01/06/2017.

16. DISADVANTAGED BUSINESS ENTERPRISE (DBE), MINORITY BUSINESS ENTERPRISE (MBE); SMALL BUSINESS ENTERPRISE (SBE); AND WOMAN OWNED BUSINESS ENTERPRISE (WBE) PARTICIPATION

The City encourages DBE, MBE, SBE, and WBE firms to compete for projects, and also encourages non-DBE, MBE, SBE, and WBE proposers to use DBE, MBE, SBE, and WBE firms as sub-contractors. Use of DBE, MBE, SBE, and WBE sub-contractors is not mandatory, but preferred. Proposers are required to indicate and submit their intention regarding DBE, MBE, SBE, and WBE participation on **Exhibit F - Proposed Sub-Contractors for DBE, MBE, SBE, WBE Utilization**, contained in this procurement package.

17. AGREEMENT

A contract will be released, after award, for any work to be performed as a result of this request. This Request for Proposals, the submitted Consultant's proposal, all attachments, and any addendum released, agreement if applicable, and the corresponding contract will constitute the complete agreement between Consultant and the City. Should there be any conflict between the terms of this Request for Proposals, the submitted proposal, and the terms of the agreement (Contract), the terms of the Contract shall be final and binding. The Request for Proposals shall control where in conflict with the submitted proposal. If Consultant requires an additional

contract, then Consultant should include their sample contract as an attachment to the proposal submitted for review.

18. EXHIBITS

Exhibit A: Scope of Work

Exhibit B: Location Maps

Exhibit C: Aerial Map of Phoenix Heights

Exhibit D: Environmental Site Assessment

Exhibit E: Design Guidelines

Exhibit F: Proposed Sub-Contractors for DBE, MBE, SBE, WBE Utilization

Exhibit G: Project Sign