



Procurement & Contracting Department  
110 SE Watula Avenue, Third Floor  
Ocala, Florida 34471  
Telephone: (352) 629-8402  
[www.bidocala.com](http://www.bidocala.com)

**The City of Ocala is accepting sealed electronic submissions for:**

**Invitation to Negotiate (“ITN”) No.: [GRM/260683](#)  
for the Development of NW 7<sup>th</sup> Avenue – Tucker Hill – Section 2,  
Ocala, Florida**

**Official copies of all solicitation documents may be obtained via electronic  
download from the City of Ocala’s e-procurement portal located at:  
[www.bidocala.com](http://www.bidocala.com).**

**Copies of documents obtained from any other source are not considered  
official copies.**

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**Solicitation Issue Date:** **June 23, 2026**

**Deadline for Questions:** **August 6, 2026, at 5:00 p.m. (EST)**

All questions must be submitted to the Procurement Department electronically via [www.bidocala.com](http://www.bidocala.com). Responses will be made electronically and posted online. It is the responsibility of the proposers to check for updates. Any questions received after the deadline will not be considered. Any inquiries regarding this solicitation must be submitted via e-mail to the Buyer Contact identified below.

**Submission Deadline:** **August 26, 2026 at 2:00 p.m. (EST)**

Sealed electronic submissions shall be accepted via the e-procurement portal up to the submission deadline noted above. Submissions received after the deadline or transmitted to the City of Ocala outside of the e-procurement portal shall be rejected. Any submissions received after the stated time and date will not be considered.

**Buyer Contact:**

**DAVID WILLIAMS, BUYER**  
**E-Mail:** [dwilliams@ocalafl.gov](mailto:dwilliams@ocalafl.gov)  
**Phone:** (352) 629-8350

**THE CITY OF OCALA RESERVES THE RIGHT TO REJECT ANY AND  
ALL SUBMISSIONS**

## SECTION 1 BACKGROUND AND PROJECT OVERVIEW

### 1.1. **BACKGROUND**

The City of Ocala ("City"), through this Invitation to Negotiate ("ITN") GRM/260683, seeks proposals from interested and qualified developers, builders, partnerships and/or agencies interested in constructing a residential development on the subject parcels to include a mix of single-family detached residential homes and an open space area. **The City's intent is to use the property for the creation of Affordable Housing while maintaining quality construction and site design. The ITN will be awarded to a single developer, who will be solely responsible for completing the entire project.** The recent infusion of public and private investment, an improving economy, and the implementation of several innovative renovation grants has spurred additional private interest and investment in redevelopment aimed at providing new opportunities for Ocala. In addition to greatly enhancing the quality of life for its residents, these progressive and highly competitive steps have had a profound effect on making Ocala a "destination" location. The city now offers robust, regular entertainment, numerous cultural, retail and restaurant offerings that now consistently attract discretionary spending draw from a surrounding 75-mile radius. Since 1998, the City has made significant investments in the development of a series of master and sub-area plans for its Community Redevelopment Areas (CRA's), parks systems and cultural arts. To implement those plans, the City has purposely developed several economic development tools and policies to accelerate the growth and sustainability of the City.

The catalytic site proposed for redevelopment consists of multiple parcels (the "Property") with a total area of approximately 2.01 acres as evidenced in the map provided in **EXHIBIT A.1**. The targeted area of development for the intent of this ITN is 0.297 acres within the aforementioned site, hereby known as Section 2 as is outlined in the map provided in **EXHIBIT A.3**. This project site is in the West Ocala Community Redevelopment Area (CRA), as well as an Opportunity Zone, and Urban Job Tax Credit area. The goals for this project are ambitious and the City recognizes the potential investments it and a capable developer will need to make for this vision to become a reality.

The City intends to spur the redevelopment of a City-owned property, which will contribute to, and further accelerate, the transformational change in this area as well as the broader community. With the property located in an area identified for targeted redevelopment, the various tools afforded by this designation will be used, as justified; to assist proposers and the City achieve the desired goals. Per the West Ocala Vision and Community Plan, hereto attached as **EXHIBIT B**, infill development should include a variety of attached and detached housing types that connect homes to employment opportunities. The plan also emphasizes the creation of safe and accessible public parks, squares, and green spaces throughout the community, serving as focal points for neighborhood and community activities and events. Additionally, it advocates for establishing a connected network of parks, sidewalks, and trails. Proposers should carefully consider how the development will contribute to a vibrant neighborhood and a pedestrian oriented public realm. Each building should be aesthetically attractive and provide an accessible, safe environment.

To better understand the City's vision for this significant area in our community, respondents are encouraged to review the exhibits that are provided with this solicitation including **EXHIBIT C** – West Ocala Community Redevelopment Plan and **EXHIBIT B** - West Ocala Vision and Community Plan which was officially adopted into the City of Ocala Comprehensive Plan (2012). The site is located within Neighborhood Future Land Use designation and with parcels zoned R-2: Two- Family Residential (R-2). Respondents should address issues such as land use, density, walkability, connectivity and other elements common in New Urbanism environments in ways that are compatible with the City's zoning and future land use designation. The lots being presented for development by way of plat are to be developed for Single Family Residential Detached homes.

In 2024, Urban 3 completed a study titled Economics of Community Design, examining the land value economics, property and retail tax analysis, and community design of Ocala. The study provided a comprehensive analysis of opportunities for the city and considerations for future growth and fiscal policy. The City anticipates an increase in value once the vacant Property is developed and requires development concepts that achieve its highest and best use.

In order to be eligible for consideration, prospective developers, builders, partnerships and/or agencies must meet the minimum qualifications set forth in this ITN and demonstrate proven experience, financial resources, and professional expertise to develop, market, and rent and/or sell quality, residential units. The City reserves the right to request additional information or require execution of additional documentation as may be reasonably necessary to determine the financing of construction of the developed units.

The City's Selection Committee shall review all proposals, conduct interviews, and recommend one or more proposals to City Council based on the evaluation criteria set forth herein. City Council may accept any proposal that it deems to serve the public interest and reserves the right to reject any or all proposals.

The transfer of title to the Property shall not occur until all of the terms of the sale are complete. Language shall be included in the deed document to allow the title to revert to the City in the event that construction is not initiated within six (6) months of closing and any deposit or other funds paid by developer shall be forfeited to the City. For the purpose of this solicitation, construction is deemed to have commenced when site and building permits have been issued and the Proposer has broken ground on the property. Construction must be completed and a certificate of occupancy (CO) issued for all units no later than 18 months from the date of closing. City staff shall monitor the project and schedule progress meetings to ensure construction is complete in accordance with the Development Agreement.

Proposers are encouraged to communicate any questions regarding this ITN by the deadline set forth for questions herein. All questions should be sent in writing via e-mail to the Buyer Contact identified. Questions and answers will be communicated to all proposers by issuing an addendum posted to [www.bidocala.com](http://www.bidocala.com).

## 1.2. PROJECT OVERVIEW

The City desires a development at the project site which creates a vibrant residential area. The redevelopment project will contribute to the vision of West Ocala. City encourages creative and innovative ideas for the use, design and space, with the goal of creating a unique, dense, walkable, and connected development. This ITN is intended to support redevelopment activities that attain the highest and best use of the property taking into consideration concepts that are physically possible, legally permitted, financially feasible and vastly productive.

- This ITN is seeking New **Single Family Detached Residence(s)** that add to the area's diverse range of housing options.
- **No multifamily, duplexes, or single family attached residential development will be considered eligible projects for the purpose of this ITN.**

## 1.3. SITE DESCRIPTION AND CURRENT CONDITIONS

The following information is provided for the purpose of consolidating data relevant to the subject property. Prior to responding to the Solicitation, proposers are responsible for (a) examining the Solicitation thoroughly; (b) visiting the project site to become familiar with local conditions that may affect cost, progress, or performance; (c) studying and carefully correlating proposer's observations with the Solicitation; and (d) notifying the Buyer Contact of all conflicts, errors, or discrepancies found in the Solicitation.

- a. See *Aerial Map* and *Case Map* attached hereto as **EXHIBIT A.3**. The parcels indicated below will undergo a lot reconfiguration to provide the minimum 60' frontage required per City code. The Marion County Property Appraiser Property Identification Numbers are as follows:
  - i. 2840-020-104
  - ii. 2840-020-004
  - iii. 2840-020-204
- b. **Land Area:** 0.297 Acres (combined).
- c. **Ownership:** City of Ocala. See *Property Record Cards* attached hereto as **EXHIBIT D**.
- d. **Zoning Designation:** R-2: Two-Family Residential. **No multifamily, duplexes, or single family attached residential development will be considered eligible projects for the purpose of this ITN.** Lots may be reconfigured by City or proposer to create parcels that are consistent with the conceptual plan.
- e. **Off-Site Infrastructure/Utilities:** These parcels have off-site infrastructure and/or utilities adjacent to the property line.

#### 1.4. **PURPOSE AND OBJECTIVES OF THE PROJECT**

##### **A. PURPOSE**

By and through Resolution 2023-40, adopted by City Council on September 19, 2023, the City currently holds an inventory of vacant lots located throughout the city for which it intends to offer for sale to qualified for-profit and non-profit developers, builders, partnerships and/or agencies for the purposes of developing and constructing new affordable housing units.

This ITN is intended to support activities that increase the supply of safe and affordable housing available for rent and ownership within the city limits of Ocala, Florida and reduce the number of vacant and blighted properties on the City's surplus property list.

##### **B. OBJECTIVES**

The City's objectives for its affordable housing parcels include the following:

###### **(1) Affordable Housing Costs**

The City wishes to promote development of single-family or multi-family housing at rents and/or sales prices (inclusive of insurance, property taxes, and homeowners' association fees, where applicable) that accommodate a range of households and are affordable to income groups ranging from 30% to 120% of Marion County's Area Median Income (AMI). See **Exhibit J – 2026 Income Limits for Affordable Housing**.

**NOTE:** The HUD income limits are updated annually and are typically released between April - May each year. The latest income limits were just released. I attached both for comparison. Below is the definition per the code and an example that has been provided to us before by the HFA.

###### **Definition Per City Code of Ordinances (Chapter 106, Article IV, Sec. 106-102.)**

**"Affordability threshold means the maximum amount (including mortgage principal, interest, taxes, insurance, rent, and utilities) that a dwelling unit can be sold or rented for to be considered affordable housing. This threshold must be no greater than 30 percent of the income of a four-person, moderate-income household earning 120 percent of the median household income for the Ocala MSA. Rental units must be at or below Fair Market Rents for moderate-income households as established by the United States Department of Housing and Urban Development (HUD)."**

###### **Example for 2025 Income Limits provided by Housing Finance Authority (HFA) of Marion County.**

**The maximum sales price for a single-family unit to be considered affordable for an income qualified buyer, is \$255,000. This price is based upon a family of four (4) at 80% AMI. So, the sales price of \$255,000 would be lower for example, for a one (1) person household at 80% AMI but could be greater for example, for a four (4) family household at 120% AMI. They made assumptions on variables such mortgage principal, interest, taxes, insurance, and utilities.**

## (2) Long-Term Preservation of Affordable Housing Stock

The City desires to maximize public benefit by using development incentives and subsidies to provide a mix of affordable housing opportunities that are available to citizens of the City of Ocala for the longest affordability period possible. The desired minimum affordability period for both rental and for-sale housing units is twenty (20) years after the date of issuance of a certificate of occupancy for new construction projects in accordance with Section 106-105 of the Code of Ordinances, City of Ocala, Florida.

### 1.5. DEVELOPMENT OBJECTIVES

The City desires building plans with orientation and building design that are compatible with the surrounding uses, meet all applicable building codes, and integrate the *Design Guidelines and Minimum Project Specifications* outlined in **EXHIBIT H**. Finalized architectural plans must be approved by the City of Ocala's Growth Management Department prior to closing. The City will support plans that encourage sustainable development practices that compliment and create harmony among all adjacent uses. The redevelopment of the delineated project area should complement the City's master planning and visioning efforts. The City believes that the redevelopment of property can generate diverse job opportunities for its residents by utilizing a variety of skills and abilities. The Proposer is encouraged to make every effort to provide employment opportunities to residents of West Ocala and the broader Ocala community throughout the project's development. The following information is provided to assist Proposers with the preparation and refinement of their respective development proposals.

- A. **Land Acquisition Price (Purchase Price).** The project will provide affordable housing on the west side of Ocala and will convert undeveloped/vacant lots to new housing. The City of Ocala has the option to sell vacant lots to Developers at fair market value. See *Property Record Cards* attached hereto as **EXHIBIT D** for property additional information. The City may be deemed at closing, to have provided Developer with a City incentive in the amount of the fair market value of the property.
- B. **Site Control.** The City of Ocala is owner of the subject Property. The City intends to provide site control by fee-simple conveyance, subject to final approval by City Council. The Property will be sold to the successful developer pursuant to the terms and conditions of the Development Agreement. **The Property will be sold on an "as-is" basis.**
- C. **Permits.** The successful developer shall be required to obtain all required permits for construction. It shall be the responsibility of the proposers to diligently conduct additional research to verify permitting requirements for the project.
- D. **Incentives.** The City and the CRA are willing to consider development incentives if they are justifiably needed, subject to the availability of funding through the West Ocala CRA subarea. Suggested and required incentives must be identified and quantified by the respondent. The rationale for each incentive desired must be explained sufficiently to justify its need. The City/CRA will not consider incentives as compensation for risk. The City does not have the ability to provide short-term cash incentives. When necessary, respondents should carefully consider incentive options that would provide long-term benefit and win/win scenarios for the respondent and the City/CRA. At the full discretion of the City, fee incentives (waiver, deferment or reimbursement) may be available.

Possible incentives may include building permits, plumbing permits, electrical permits, gas permits, fire review fees, site plan review fees, site permit fees, fees to access city-owned drainage retention areas, water and sewer impact fees, water meter charges, infrastructure improvements, fire impact fees, education impact fees, transportation impact fees, and sanitation impact fees.

- E. **Development and Design Standards.** All proposals are required to adhere to the *Design Guidelines and Minimum Project Specifications*, attached hereto as **EXHIBIT H**. Architectural plans must be approved by the City of Ocala Growth Management Department prior to closing. Developer/Contractor shall be responsible for providing all labor, materials, and equipment necessary to perform the services as described in the solicitation documents and in strict accordance with the current Florida Building Code. If a conflict exists, the more stringent regulation/specification shall govern. Developer/Contractor shall immediately notify the City Project Manager of any conflict discovered. Architectural design should take into consideration the adjacent homes and represent a complementary architectural style.

These design guidelines aim to encourage creative building solutions while maintaining consistent design quality. They provide direction for the overall appearance of buildings, promoting harmonious elements and facades. All homes must include a garage and utilize a variety of materials, such as concrete block on the first floor, paired with durable exterior finishes.

One section of the property is being subdivided into seven (7) Single Family Detached Residential lots and a public park area. The conceptual subdivision plan for NW 7<sup>th</sup> Avenue Subdivision was approved by the City Council on September 1, 2020. The approved conceptual plans are attached hereto as **EXHIBIT E**. The remaining section features an additional six (6) Single-Family Detached Residential lots. The proposed project that will conform to the existing or appropriate zoning classification. **Proposals must address the entire project area as specified in the Section 2 EXHIBIT A.3 map provided, maximizing the developable area on each parcel, integrating quality landscaping, functional components, and high-quality finishes for individual units will be viewed favorably.** Building design and construction should prioritize longevity and adaptability, featuring simple forms and flexible floor plans. Architectural features should enhance visual appeal and create interest through thoughtful facade treatments. Building elevations that face a street must be considered primary facades.

**Proposers must specify the approximate square footage of units and outline the envisioned total development timeline for the site.** Submissions should include colored renderings of the site and detailed front, rear, and side elevations of the buildings.

Any deviation from the provided guidelines must include a detailed justification. The City reserves the right to reject any proposal or request modifications to ensure alignment with the City's vision for the project.

- F. **Construction Timeline.** Developer must provide a construction schedule, including time for building permits. The City reserves the right to implement certain deadlines and milestones to ensure the project remains on schedule. Construction of the entire project **must** be completed within **18 months** of closing date. Language shall be included in the deed document to allow title to revert to the City in the event that construction is not initiated within six (6) months of closing and any deposit or other funds paid by the

Developer shall be forfeited to the City. A [Schedule of Key Activities](#) is provided in **EXHIBIT F**.

- G. **Accessibility.** Proposers are required to design a project that is pedestrian friendly and accessible to persons with disabilities in compliance with the Americans with Disabilities Act (ADA).
- H. **Funding Commitments.** Developer must show evidence of funding commitment to complete construction such as a construction cost estimate and bank funding commitment letter, bank statement(s), and/or grant agreement(s) to support construction of the project. See *Financial Review Committee (FRC) Guidelines* attached hereto as **EXHIBIT G**.

### **1.6. ZONING AND DESIGN PRINCIPLES**

The site is zoned Residential-Two Family (R-2). This zoning district is intended primarily for residential uses. This zoning district allows for one-and two-family dwellings. Please refer to the Residential-Office District Regulations at Article V, Division 6, sections 122-371 through 122-378 of the [Zoning Code for the City of Ocala](#).

The development should improve the pedestrian environment through building orientation, attractive building facades and pedestrian amenities. The design principles call for activation along the street with ample street facing windows and visible customer entrances. Quality natural building materials are expected. Buildings are to respect the street context, form street walls and provide density. Parking should be contained on site in accordance with the Zoning Code. Building design and architecture shall incorporate elements of the Form Based Code as outlined in Appendix F.

### **1.7. DEVELOPMENT STRUCTURE**

The available parcel totals 0.297 acres; all parcels are owned by the City. The City will consider several site control options, including sale of the project site, or other arrangements to be negotiated with the selected developer. The cost(s) and terms will be negotiated with individual builders/developers.

This site falls within a designated Community Reinvestment Area (CRA) and/or may be eligible for tax incentives.

### **1.8. MINIMUM QUALIFICATIONS**

Responding developers, builders, partnerships and/or agencies shall be required to meet minimum qualifications at the time proposals are submitted. Proposals must clearly demonstrate that the developer, builder, partnership and/or agency meet the following qualifications:

- A. Have no less than five (5) years of relevant project experience involving the development and construction of mixed-use projects (i.e., yielding at least 3 completed residential dwelling units, subdivision , or some combination);
- B. Have principally developed and completed no less than three (3) separate mixed used projects;
- C. Have creditworthiness and a demonstrated capacity to secure the financial commitments proposed to complete the development;

- D. Be authorized to do business in the state of Florida and possess all required business and professional licenses;
- E. Be able to comply with the proposed or required performance schedule; and
- F. Have a satisfactory record of contractual performance.

**1.9. EXHIBITS.** Each of the following Exhibits are incorporated into and made a part of this ITN as if fully set forth herein.

**EXHIBIT A.1:** Comprehensive Project Area Aerial and Case Maps

**EXHIBIT A.3:** Section 3 Specific Aerial and Case Maps

**EXHIBIT B:** West Ocala Vision and Community Plan

**EXHIBIT C:** West Ocala Community Redevelopment Plan

**EXHIBIT D:** MCPA Property Record Cards

**EXHIBIT E:** Conceptual Subdivision Plans

**EXHIBIT F:** Schedule of Key Activities

**EXHIBIT G:** Financial Review Committee (FRC) Guidelines

**EXHIBIT H:** Design Guidelines and Minimum Project Specifications

**EXHIBIT I:** Sample Single Family Detached Residence Elevations

**EXHIBIT J:** 2026 Income Limits for Affordable Housing

**1.10. LOBBYING AND PROPOSER CONTACT**

- A. PROPOSERS ARE HEREBY ADVISED THAT CONTACT IS NOT PERMITTED WITH ANY CITY PERSONNEL OR BOARD MEMBER RELATED TO OR INVOLVED WITH THIS REQUEST. PROPOSERS ARE RESTRICTED FROM DISCUSSING THEIR SUBMITTALS AND THIS SOLICITATION WITH COMPETING FIRMS. ALL ORAL OR WRITTEN INQUIRIES MUST BE DIRECTED THROUGH THE ASSIGNED BUYER CONTACT.
- B. 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.
- C. CONTACT WITH OTHER SUBMITTING PROPOSERS IS RESTRICTED AFTER ADVERTISEMENT AND PRIOR TO THE CITY COUNCIL VOTE ON THE AWARD OF THIS CONTRACT.
- D. ANY PROPOSER OR ANY INDIVIDUALS THAT LOBBY ON BEHALF OF PROPOSER OR INTERACT WITH OTHER PROPOSERS AS DESCRIBED IN THIS SECTION DURING THE TIME SPECIFIED WILL RESULT IN REJECTION/DISQUALIFICATION OF THEIR PROPOSAL UNDER SAID SOLICITATION.

**END OF SECTION**

## INSTRUCTIONS TO PROPOSERS

The intent of this Section is to standardize the proposals to allow for ease of evaluation. It is not an attempt to limit the content of the proposals. Proposers may include any additional data or information deemed pertinent to the ITN.

Proposals should be prepared simply and economically, providing a clear and concise response to the requirements herein. Proposers are encouraged to describe those characteristics and services that make their respective organizations unique and best suited for selection. Proposals which fail to provide requested information and assurances of performance sufficient enough to accurately assess the evaluation criteria set forth herein will be rejected and shall not be given further consideration.

Proposals may be accepted and a contract awarded on the basis of the initial proposals received. Oral presentations and/or Best and Final Offers may not be requested or required if it is determined by the City's Selection Committee that a selection is capable of being made on the initial proposals submitted.

### 2.1 **SUBMISSION OF PROPOSALS**

- A. Proposer shall upload one (1) electronic submittal package on [www.bidocala.com](http://www.bidocala.com) for evaluation.
- B. All proposals must be electronically submitted by or before 2:00 PM, on the listing end date/bid close date cited on ProRFX at [www.bidocala.com](http://www.bidocala.com).
- C. Only submittals received electronically on [www.bidocala.com](http://www.bidocala.com) by the correct time and date will be recorded.
- D. Proposals may not be submitted by any other means other than as described in this Section. The City will not accept proposals sent by U.S. Mail, private couriers, facsimile, or e-mail.
- E. Proposers are required to carefully examine the ITN, all attached Exhibits, and any subsequently issued addenda to become thoroughly familiar with any and all conditions and requirements that may in any manner affect the work to be performed under the resulting contractual agreement. No additional allowances will be made due to Proposer's lack of knowledge of these conditions.
- F. Proposals failing to conform to the instructions provided in this ITN will be subject to disqualification in the sole discretion of the City.

### 2.2 **ORGANIZATION OF PROPOSAL**

Proposers shall construct their submittals in the following format with a tab separating each Section.

2.3 **Transmittal Letter.** A transmittal letter must accompany the submittal and must be signed by an individually legally empowered to represent the responding developer, builder, partnership and/or agency (referred to in this section as the “Developer”). The transmittal letter should include the following:

- (1) A statement identifying the legal name of the Developer and stating the entity type for the Developer and any joint developer(s) or subcontractor(s) (e.g. non-profit organization, or for-profit corporation, limited liability company, partnership, sole proprietor, etc.).
- (2) A statement identifying the person(s) and title(s) of the person(s) authorized to sign all legal documents on behalf of the Developer.
- (3) A statement acknowledging receipt and review of this ITN by the Developer, including its Exhibits and any and all addenda, and understanding that all terms and conditions contained herein may be incorporated into a resulting contract.
- (4) A statement that the Developer and its joint developer(s) or subcontractors:
  - (a) have no less than five (5) years of relevant project experience involving the development and construction of redevelopment projects;
  - (b) have principally developed and completed no less than three (3) separate mixed-use redevelopment projects;
  - (c) have creditworthiness and a demonstrated capacity to secure financial commitments proposed to complete the development; and
  - (d) are individually registered to do business in the state of Florida and that evidence of such registration shall be provided prior to contract award.

**TAB 1 – Development Team Composition, Roles, and Availability.**

- (1) Provide a brief narrative which provides a general description of the name, address, telephone number, and e-mail address of the Developer and any joint developer(s), subcontractor(s) or other key personnel (general contractor, architect, engineers, etc.) that will be committed to the Project.
- (2) For each Development Team member identified, describe their respective role and responsibilities as it relates to this Project and provide a resume depicting education, certifications, professional affiliations, licensure, and any other unique qualifications.
- (3) Identify the percentage of time that each Development Team member intends to devote to the entire Project and any other projects currently on-going or anticipated to be on-going during the timeframes noted in the Project Schedule.
- (4) If any member of the Development Team or subcontractor(s) are a Minority Business Enterprise certified by the state of Florida or qualifies as a Section 3 Business Concern, please provide a copy of said certification(s).

**TAB 2 – Experience and Qualifications of the Development Team.**

- (1) Provide a narrative overview of the Development Team’s experience and cohesion, as demonstrated by past experience working together on mixed-use projects of comparable size and complexity.

- (2) List the 3 qualifying mixed-use redevelopment projects and any other applicable projects in the last three (3) years where the Developer and any joint developer(s) or subcontractor(s) principally developed, constructed, and completed mixed-use projects. For each project submitted as proof of experience, please identify:
  - (a) Project location;
  - (b) Project description;
  - (c) Number and size of developments;
  - (d) Year completed; and
  - (e) Project cost.

### **TAB 3 – Development Concept and Project Summary.**

- (1) Provide a development concept that identifies the type of development and/or partnership the proposer envisions with the City (e.g., property purchase, long term lease, and/or build-to-suit) and summarizes the overall economic impact and tangible benefits for the redevelopment area and the City. The development concept must include, without limitation, the following:
  - A narrative of the proposed development which includes a description of how the development will meet the requirements and considerations of this ITN.
  - A narrative describing the development's short-term and long-term growth goals
- (2) Provide a schematic design of the overall area, including descriptive architecture and site design concepts, in plan and perspective views. See **EXHIBIT I** for example elevations.
- (3) Describe any unique design elements or other features that make the proposal a signature development which will enhance the versatility and appearance of the project site.
- (4) Provide the anticipated land use/building mix, including estimated square footage, number of dwelling units, by type of use.
- (5) Demonstrate the development's compatibility with the surrounding context and how it adds vitality to the surrounding area.
- (6) Preliminarily identify the major building materials. It is not necessary to fully identify the palette of materials and color at this time. Renderings that illustrate planning and design concepts at the urban, building, and pedestrian scale (from street perspective) are encouraged but not required.
- (7) Any proposal to purchase the property must include a minimum purchase price in an amount not less than the fair market value. City reserves the right to give preference to the proposal with the highest proposed purchase price

### **TAB 4 – Project Schedule, Costs, and Financial Projections**

- (1) Provide a timetable for each major phase of the project (if applicable), including estimated annual market value of each phase of development and an outline of the phasing strategy and associated costs.
- (2) Provide a projection depicting the schedule of events from project submittal to project completion.

- (3) Provide estimates for both hard and soft costs, including those for building contractors, and professional fees for architectural, legal, financial, and other professionals.
- (4) Explain the financial strategy by providing a preliminary development pro forma showing total development costs and proposed sources and uses of funds for the project; and demonstrating project feasibility and developer's ability to secure financing.
- (5) Complete the preliminary Term Sheet attached to this Solicitation as **Appendix I – Preliminary Term Sheet**
- (6) **APPENDICES:** Proposer may provide additional information in appendices to the proposal. Information in the appendices will not be considered for scoring purposes but will be considered after scoring for use in contract and Project execution.
  - **Appendix I – Preliminary Term Sheet.** Appendix I shall include information required to complete a preliminary Term Sheet for the Project.
  - **Appendix II – Exceptions to Sample Development Agreement Terms.** Appendix II shall include any potential exceptions to the City's Development Agreement. This list of exceptions will not be used for scoring. The list of exceptions from the winning Proposer will be submitted to the City's Attorney to begin review of the exceptions in an effort to advance Development Agreement negotiation process as quickly as possible.

#### 2.4. **EVALUATION CRITERIA AND PROCESS**

It is the intention of the City to award the contract for development rights to the subject Property to the most qualified, responsive, and responsible developer.

- A. Administrative Review of Proposals.** City Procurement and Contracting Department staff shall first review all proposals in detail to make a determination as to the responsiveness of each proposer.
  - (1) A proposal will be deemed responsive where it complies with the requirement as set forth in this ITN, including the submission of all required documentation as outlined herein.
  - (2) If a proposal is found to be inadequate with regard to any of the requirements set forth in this solicitation, the City's Procurement and Contracting Officer, in his/her sole discretion, shall make a determination as to whether or not the deficiency can fairly be corrected or if the proposal should be rejected and found to be non-responsive.
  - (3) Only those proposals found to be responsive shall be submitted to the Selection Committee.
- B. Selection Committee Preliminary Review (Pass/Fail).** Preliminary Review shall consist of the evaluation of proposal quality and clarity, as well as the proposer's understanding of the project and construction approach on a pass/fail basis. Selection Committee members will individually assess a pass or fail score for each of the evaluation criteria noted below. Proposals that do not receive a passing score from a majority of the Selection Committee members shall be rejected. Those proposals receiving a majority passing score shall be shortlisted and shall move forward to Financial Review.

PRELIMINARY EVALUATION CRITERIA	SCORING (PASS/FAIL)
Proposal Quality, Including Clarity and Understanding of Project and Objectives	Pass/Fail
Design and Construction Approach and Process	Pass/Fail

- C. Financial Review Committee Review.** A Financial Review Committee consisting of non-voting members will be formed for the purposes of reviewing specific portions of a proposal and requesting specific information and documentation necessary to determine project feasibility with regard to cost, financing, and proposer’s financial resources to perform the contract and provide the services. The Financial Review Committee’s findings will be provided to the Selection Committee for use in Final Scoring.
- D. Selection Committee Final Review.** Selection Committee Final Review shall consist of the evaluation of the proposals received only from those firms shortlisted during Preliminary Review against the evaluation criteria noted below. If oral interviews and presentations are determined to be necessary, final scoring will be conducted after the interviews.

EVALUATION CRITERIA	WEIGHT
<b>Experience and Capacity of Development Team.</b> <i>The successful experience of the development team in the planning and construction of residential or mixed-use projects of comparable size and complexity. Cohesion of the development team and demonstrated by their previous experience and past track record of completing similar projects on schedule and within budget.</i>	35
<b>Development Concept and Project Design.</b> <i>The degree to which the proposed development concept meets the City’s objectives. The degree to which the proposed site concept design utilizes the site effectively with regard to functional layout, accessibility, pedestrian improvements, street access, and connectivity to the surrounding area. The degree to which the proposed building design uses scale and architecture compatible with the applicable design standards and the extent to which building design incorporates innovations, energy efficiency, and green features.</i>	30
<b>Financing Plan.</b> <i>Feasibility of the financing plan for development as reflected in the development budget, pro forma, sources of funds and reasonableness of development costs.</i>	25
<b>Development Schedule.</b> <i>Development schedule to complete each phase of the project according to project benchmarks that are well-defined and realistically achievable. Ability to meet the proposed development schedule based on the development team’s respective disciplines, staffing availability, clear lines of responsibility, past experience, and history of completing projects of a similar nature.</i>	10
<b>Total Maximum Points</b>	<b>100</b>

- 2.5 **NEGOTIATIONS AND INTENT TO AWARD.** After teams have been ranked based upon the Evaluation Criteria, the City will engage in negotiations with the highest ranked proposer with the intent of reaching a development agreement granting development

rights to the subject property. In the event that the City is unable to negotiate a contract with the highest-ranked proposer, such negotiations will be terminated, and negotiations will commence with the next highest-ranked proposer, and so forth, until a contract is negotiated or the City rejects all proposals and terminates the solicitation.

- (1) Negotiation meetings will be conducted in Ocala, Florida and the City will distribute instructions and/or agendas in advance of each negotiation session. Representatives for the proposer should plan to be available, without interruptions, for the entirety of the scheduled negotiation meeting.
- (2) Negotiations will not be open to the public, but will be recorded pursuant to Section 286.0113, Florida Statutes. The recorded sessions and any records presented at the meeting will remain exempt from Florida Public Records until such times as the City provides notice of an intended decision or until 30 days after the final reply, whichever occurs first. Provided, however, if the information provided at the meeting is deemed to be material to the ITN, then an addendum will be issued to all responders.
- (3) After the successful negotiation of a Development Agreement, the City will issue its Intent to Award and present the resulting Agreement to City Council for approval. City Council may approve the recommended award and negotiated Agreement or reject the award and Agreement. The decision of City Council shall be final.

**END OF SECTION**