

**REQUEST FOR QUALIFICATIONS
FOR
AFFORDABLE HOUSING FINANCIAL AND DEVELOPMENT ADVISOR
ALL PROPOSALS MUST BE ADDRESSED AND SUBMITTED TO:**



**NADINE JARMON, PhD., EXECUTIVE DIRECTOR
HOUSING AUTHORITY CITY OF DEERFIELD BEACH, FLORIDA
533 S. DIXIE HIGHWAY, 2nd FLOOR
DEERFIELD BEACH, FLORIDA 33441
PROPOSALS MUST BE RECEIVED ON OR PRIOR TO 1:00 P.M.
WEDNESDAY, NOVEMBER 8, 2017**

Responses may be emailed to Dr. Jarmon at njarmon@dbhaonline.org

**Deerfield Beach Housing Authority and Deerfield Beach Family Empowerment, Inc.
Affordable Housing Financial and Development Advisor-Request for Qualifications**

INTRODUCTION

Since our establishment by a charter of the City of Deerfield Beach in 1969, the Deerfield Beach Housing Authority (DBHA) has been committed to advocating for and providing affordable housing for eligible individuals and families. The DBHA works closely with the U.S. Department of HUD, the City of Deerfield Beach, and area agencies and organizations. DBHA manages 2 family and elderly public housing developments totaling approximately 196 units and administers approximately 482 Housing Choice Vouchers under the Section 8 program. In 2015, DBHA also formed a non-profit entity, the Deerfield Beach Family Empowerment, Inc. (“DBFEI”) to allow for additional partnering and leveraging opportunities in the affordable housing arena.

The DBHA is seeking statements of qualifications from professional consultants experienced in a myriad of funding and development strategies to assist the DBHA in its mission and vision to provide affordable and quality housing in the City of Deerfield Beach and surrounding area.

The Authority’s goal is to have the Development proceed as expeditiously as possible. Responses that demonstrate an ability to complete the Development on the earliest possible, realistic schedule will be favorably received by the Authority. Respondent shall certify its ability to start work immediately, and should propose a staffing plan that describes the existing time commitments of the staff proposed to be assigned to the project and whether any of the staff will be locally based.

This Request for Qualifications is intended to procure a development partner for the Development. Respondents are encouraged to present to the Authority a complete team including the trades required for the success of the Development. The team may include architectural, legal and financial services.

The Authority will serve as co-developer for the on-site development.

THE DEVELOPMENT PARTNER’S ROLE

The following will be the responsibility of the selected firm:

- Preparation of a Development Plan that shall include (1) a time table with milestones for completion, (2) study sufficient to identify the need to build additional housing units, and if so, what type (elderly, assisted living, mixed income, etc.), how many units, where they should be located, and when they should be built, (3) a list of all known available funding sources for each proposed action, including traditional and alternative financing options (4) a management plan, (5) considerations and certifications as may be required to obtain city, state, federal, or HUD approvals required to initiate any proposed projects,

- Coordinate environmental and geotechnical testing and an analysis of the condition of existing utilities at the sites at each phase of development
- Develop a construction strategy and a development implementation schedule
- Work with the Authority to develop detailed development and operating budgets. The selected respondent will be required to expand and update the budgets throughout the development process
- Provide regular monthly reports to the Authority on the progress of the development efforts, including work completed, associated costs, schedule and budgetary requirements
- Work with the Authority and its legal team to create an ownership structure for the development which shall include an affiliate of the Authority as a general partner
- Oversee procurement of the construction contractor
- Negotiate and/or obtain operating and financing guarantees to the equity investor and other lending institutions
- Assist in obtaining all required building permits and zoning approvals
- Assist management company in developing marketing and lease-up plan.

The Authority is interested in a financial structure that allows it to participate in a stream of income from the development, including a portion of the developer fee, property management fee, and any incentive management fee.

Each respondent must have, or within its team provide, the following:

- a. Experience in maximizing the use of various financing vehicles;
- b. Experience in the development, construction and operation of a housing development;
- c. Expertise in housing developments that incorporates tax credit and affordable housing financing, including project based vouchers;
- d. Expertise in regulatory compliance issues;
- e. Expertise with local government authorities which regulate the permits and utilities necessary for the Development.

SCOPE OF WORK

- Provide assistance to DBHA and its non-profit entity in structuring new construction, acquisition rehabilitation and development projects to determine feasibility
- Coordinate and manage all facets of the development process
- Assist with securing debt and equity
- Assist with securing government financing and grants
- Provide intense strategic and advisory services through the closing of any specifically identified project
- Assist with developing project scopes and independent cost estimates
- Prepare monthly reports to be presented to the Board of Commissioners
- Provide coordination with various City departments on permitting and other requirements associated with any specific project undertaken by DBHA or Deerfield Beach Family Empowerment, Inc.

SUBMISSION REQUIREMENTS

Responses that do not include all required information will be deemed unresponsive.

Each respondent is required to submit a response providing information on the following items:

- a. **Letter of Interest:** Respondent's submittals shall be accompanied by a Letter of Interest on the respondent's letterhead. The letter should state the proposer's understanding of the work to be done, the commitment to perform the work expeditiously, a brief statement indicating why the proposer believes that it is the best qualified to perform the engagement, and a statement that the response is firm and irrevocable for 90 days.
- b. **Respondent's Qualifications:** The respondent shall submit the following information regarding its qualifications: (50 points)
 1. **Location of Offices.** Indicate the location of the Respondent's principal office and the office from which services will be provided. Provide a brief history of the firm, including the year it was founded. Describe the size of the firm in number of offices and employees providing development services.
 2. **Organizational Structure and Staffing:** Provide a detailed description of the organizational structure and staffing of the respondent.
 3. **Profile of Principals and Key Staff:** Provide profiles of the principals and key staff to be involved in the development effort. This information should specify their roles, their existing time commitments, their previous development experience and whether the staff will be locally based. Identify the individual who will serve as the project manager and who will direct and coordinate the development effort to completion.
 4. **Termination:** Indicate whether the respondent or any respondent team member has been terminated from a contract, and if so, describe the circumstances and outcome.
 5. **Litigation:** Indicate whether the respondent or any respondent team member has ever sued or been sued by a public agency, and if so, describe the circumstances and outcome.

6. Previous Housing Development Experience: Provide information on all residential (rental or homeownership) development projects in which the respondent has participated. This information should list the location, size, ownership type, public programs utilized, income levels served (very low, moderate, market rate or mixed), type of development (high, mid or low-rise, walk-ups, townhouses, etc.), and development cost. Also describe the construction and permanent financing arrangements showing the nature and extent of the participation of financial lending institutions and of the developer
 7. Financing Techniques. Describe the firm's experience applying for and integrating different subsidies such as low-income housing tax credits, tax-exempt bonds, HOME, CDBG, AHP, etc. Be sure to include experience related to all subsidies anticipated in your preliminary financing plan. Describe your firm and team members' experience with Low-Income Housing Tax Credits and particularly with Florida's affordable housing programs.
 8. Capacity: Respondent shall certify that the respondent and all team members are available to start immediately. The respondent should describe any existing time commitments of the proposed team members or their proposed staff which would impair the respondent's ability to proceed expeditiously.
 9. References: Provide the name, mailing address and telephone number of three references.
 10. Evidence the respondent is currently registered to do business in the State of Florida.
 11. Certifications: The following signed Certifications attached to this RFQ:
 - (i) Certification of Proposer Regarding Debarment, Suspension and Other Responsibility Matters,
 - (ii) Certification Regarding Lobbying, and
 - (iii) Conflicts Certification.
- c. Understanding Local Requirements:** Demonstrate that the proposer possesses an understanding of local requirements and procedures that will enable the effort to be efficiently completed. (10 points)

- d. Fee Structure:** Propose a fee structure for predevelopment and development activities and the source of payment of such fees. (40 points)

RETENTION

All submissions are the property of the Authority and shall be retained by the Authority. Responses will not be returned.

CANCELLATION/WAIVER

The Authority reserves the right to cancel this Request for Qualifications or to reject, in whole or in part, any and all submissions received in response to this Request for Qualifications, upon its determination that such cancellation or rejection is in the best interest of the Authority. The Authority further reserves the right to waive any minor defects in any submissions received, if it is in the public interest to do so. The decision as to whom shall receive a contract award, or whether or not an award shall be made as a result of this Request for Qualifications, shall be the absolute sole discretion of the Authority.

The Authority will reject the proposal of any respondent who is suspended and/or debarred by HUD from providing services to public housing authorities, and reserves the right to reject the proposal of any respondent who has previously failed to perform any contract properly for the Authority.

The determination of the criteria and process whereby submissions are evaluated and the decision as to who shall receive a contract award shall be at the sole and absolute discretion of the Authority. The Authority has absolute veto power in the case of disagreement regarding the project scope, ownership structure, unit mix, income levels served, etc.

KEY PERSONNEL

The key personnel specified by the successful respondent will be considered essential to the work to be performed by the successful respondent. Prior to diverting any of the key personnel for any reason(s), the contractor shall notify the Authority in writing, at least thirty (30) calendar days in advance, and shall submit justification (including proposed substitutions) in sufficient detail to permit evaluation of the impact on the contract. The firm shall not change key personnel or hours to be devoted, before or after contract award, without written permission from the Authority.

NO COMPENSATION FOR RESPONSE

Respondent will not be compensated for work or costs related to preparation and submission of this proposal. The proposal shall become property of the DEERFIELD BEACH HOUSING AUTHORITY. The proposal shall not be returned to the respondent.

G. INITIAL REVIEW

All responses will be initially reviewed to determine compliance with the response format requirements specified within this Request for Qualifications. Responses that do not comply with these requirements may be rejected without further review.

H. SELECTIONS PROCESS

The purpose of this Request for Qualifications is to solicit quality submissions so that the Authority may select the one that meets its needs and requirements. It is further desired that the Request for Qualifications process will ensure competitiveness among respondents. The Authority urges all interested respondents to carefully review the requirements of this Request for Qualifications.

All submissions will be evaluated by an Evaluation Committee appointed by the Executive Director. Written submissions containing the requested information will serve as the initial basis for selection of finalists. Each written proposal has a possible score of 100 points as set forth above. The Evaluation Committee's recommendation will be presented to the Authority's Board of Commissioners. The Authority's Board of Commissioners will then review the proposals, recommendations, and select the respondent to enter into negotiations for the Development Agreement.

The Authority will select the winning respondent based upon the evaluation criteria and the Authority's particular needs. The top-rated respondent will be invited to negotiate a development services agreement with the Authority. In the event the Authority is unable to reach an agreement with the top-rated firm, then the Authority may contact the second-rated firm for the negotiation process.

The Authority may require a respondent to make an oral presentation in support of its submission, or to exhibit or otherwise demonstrate the information contained in it. This presentation or demonstration may be required to be presented before the Deerfield Beach Housing Authority Board of Commissioners. If required, respondents will be notified in writing prior to the date of such presentation(s).

Form of Contract

The Authority will enter into a contract (Master Development Agreement, Development Services Agreement, or Indefinite Quantitative Contract) with the selected developer partner to complete the projects noted in this Request for Qualifications. However, the contract may have provisions for additional development projects that may become available during this time and the developer partner may be requested to add these projects to the contract. The developer partner will be required to execute any and all standard forms required by the U. S. Department of Housing and Urban Development (HUD).

Compliance with Federal, State and Local Laws

The successful respondent Developer understands the agreements made between private entities and local governments are subject to certain laws and regulations, including, but not limited to, laws pertaining to public records, conflict of interest, and record keeping. The successful submitter agrees to comply with and observe all applicable laws, codes, ordinances, rules and regulations as they may be amended from time to time.

ADDITIONAL EXHIBITS

Respondents are to provide the following DBHA/HUD Certifications:

- Vendor Authorization Form
- Non-Collusive Affidavit
- Sole Proprietor Authority (must be notarized)

RFQ REVIEW

After the initial proposal review, firms may be asked to be available for interview. If this occurs, travel expenses will be the responsibility of the respondent. Members of DBHA staff will review the proposals and make a recommendation to its Board of Commissioners at the November 2017 meeting.

All proposals must be received by **Wednesday, November 8, 2017, 1:00 P.M. EST** at the below address or emailed and labeled as follows”

**Proposal for “Affordable Housing Financial and Development Advisor”
Nadine Jarmon, PhD., Executive Director
Deerfield Beach Housing Authority
533 S. Dixie Highway, Suite 201
Deerfield Beach, FL 33441
Office: (954) 425-8449, Ext. 110**

Email: njarmon@dbhaonline.org

NOTE: Electronic submission are encouraged and preferred

CANCELLATION OF THE RFP

The DBHA reserves the right to cancel this RFQ at any time, for any reason, and without liability of cancellation is deemed to be in the best interest of DBHA. The proposer assumes the sole risk and responsibility for all expenses connected with the preparation of its proposal.

This solicitation does not commit the Deerfield Beach Housing Authority to award a contract, to pay any costs incurred in the preparation of a response, or to contract for the services. The Deerfield Beach Housing Authority reserves the right to accept or reject any or all responses received as a result of this request, to waive informalities, to negotiate with all qualified

consultants, or to cancel in part or in its entirety, if it is in the best interest of the Deerfield Beach Housing Authority to do so. The selected consultant will be asked to enter into a Professional Services Agreement with the Deerfield Beach Housing Authority.

VENDOR AUTHORIZATION FORM

ASSIGNMENTS: A vendor shall not be assigned any contract or any monies due there from without prior approval of the Deerfield Beach Housing Authority Board of Commissioners. Contact the Executive Director for proper procedure.

Unsigned proposals cannot be considered

IF FUTHER DESCRIPTIONS OF THIS PROPOSAL, WE SUBMIT INFORMATION IDENTIFIED AS FOLLOWS:

SUBMITTING PROPOSAL UNDER THE NAME OF:

Print Full Legal Name

(Contract will be issued and payment will be made only in the name above)

ADDRESS:

PAYMENT ADDRESS: (If different from above address)

FEDERAL EMPLOYER IDENTIFICATION NUMBER:

NON-COLLUSIVE/NON-IDENTITY OF INTEREST AFFIDAVIT

I, _____, being first duly, sworn,
disposes and says:

(1) That said named person is _____

(A partner or officer of the firm, of etc.)

the party making the foregoing proposal or bid; (2) that such proposal or bid is genuine and not collusive or sham; that said bidder has not colluded, conspired, connived or agreed, directly or indirectly, with any bidder or person, to put in a sham-bid or to refrain from bidding, and has not in any manner, directly or indirectly sought by agreement or collusion, or communication or conference, with any person, to fix the bid price or affiant or of any other bidder, or to fix any overhead, profit or cost element of said bid price, or of that of any other bidder, or to secure any advantage against the Deerfield Beach Housing Authority Board of Commissioner or any person interested in the proposed contract; (3) that no identity of interest exists or will between Bidder and the Owner or architect, and (4) that all statements in said proposal or bid are true.

An identity of interest will be construed to exist:

- (a) If there is any financial interest of the owner in the general contractor;
- (b) If any of the officers or directors of the owner is also an officer, director, or stockholder of the general contractor;
- (c) If any officer or director of the owner has any financial interest whatsoever in the general contractor;
- (d) If the Service Provider advances any funds to the owner, including providing a land option or any of the costs of obtaining a land option;
- (e) If the Service Provider provides and pays, on behalf of the owner, the cost of any architectural or engineering services other than those of the surveyor, general superintendent, or engineer employed by a general contractor in connection with his/her obligations under the construction contract;
- (f) If the Service Provider has any interest in the owner Corporation as part of the consideration for payment;
- (g) When there exists (or comes into being) any side deals, agreements, contracts or undertaking entered into or contemplated, thereby altering, amending or canceling any of the required closing documents;
- (h) When the contractor or any officer, director, stockholder, or partner of such contractor has any financial interest whatsoever in the architectural firm;
- (i) When the Service Provider has stock or any financial interest in the contractor;

- (j) When the contractor or any officer, director, stockholder or partner of such contract provides any of the required services; or where the Service Provider, or any officer, director, stockholder or partner of such services, acts as a consultant to the Service Provider.

IN WITNESS THEREOF, I have set my hand this _____ day of _____, 2017.

Signature of Bidder, if an Individual

By _____
Signature of Partner, if Bidder is a Partnership

By _____
Signature of Officer, Bidder is a Corporation

Title _____
Title of Officer, if Bidder is a Corporation

SOLE PROPRIETOR AUTHORITY

I, _____ on behalf of _____
(Print Name) **(Name of Company/Business)**

DO HEREBY CERTIFY that I am authorized to execute and deliver, in the name and on behalf of the Company any agreement or other instrument or document in connection with any matter or transaction, the execution and delivery of any agreement, documents or other instrument.

IN WITNESS THEREOF, I have set my hand this _____ day of _____, 2017.

Sole Proprietor

State of _____

County of _____

The foregoing instrument was acknowledged before me on this _____ day of _____, 2017 by _____ to me to be the person described in and who executed the foregoing instrument and acknowledge that he/she executed the same as his/her free voluntary act of deed.

Notary Public

My Commission Expires: _____