

The RFP Process – Part 2

Designing the RFP

Sponsored by the
Florida Housing Finance Corporation's
Affordable Housing *Catalyst Program*

Florida Housing Coalition

June 16, 2022



Our Thanks to the Florida Housing Catalyst Program



AFFORDABLE HOUSING CATALYST PROGRAM

Sponsored by the Florida Housing
Finance Corporation



we make housing affordable™

THE FLORIDA HOUSING COALITION



Catalyst Training Schedule



www.flhousing.org

THE FLORIDA HOUSING COALITION



Presenters



Gladys Cook

Resilience and Recovery Director,
and Technical Advisor

Cook@flhousing.org

(813) 830-3450



Ashon Nesbitt

Chief Programs Officer and
Technical Advisor

Nesbitt@flhousing.org

(813) 476-4170



Tamara West

Technical Advisor

West@flhousing.org

(850) 518-2235

THE FLORIDA HOUSING COALITION



Today's Agenda

- Focus on housing Request For Proposal (RFP) process for a local government
- Steps to Prepare RFP
- Steps to Issue RFP
- Scoring Process
- Evaluate RFP
- Case Study-Bahama Village

What is a Request for Proposal (RFP)?

A request for proposal is a document used to gather bids for a project or service.

Government agencies may use an RFP to find the best vendor for an affordable housing project.

The RFP will establish the scope of the project.

Simplified RFP Process-(6 Basic Steps)

1

Gathering RFP
requirements

2

Crafting your
RFP

3

Conducting the
initial
evaluation

4

Following up
with vendors

5

Making your
final selection

6

Creating and
completing the
contract

THE FLORIDA HOUSING COALITION



Steps to Prepare for the RFP

THE FLORIDA HOUSING COALITION



What type of RFP?

1. Homeownership?
2. Multi-family rental?
 - Local Government Contribution for FHFC RFA
 - Area of Opportunity Support for FHFC RFA

What is the funding source?

1. State funding
2. Federal funding
3. Local government funding
4. Combined Sources of funding

Who do you need to Coordinate with?

- Procurement Office
- Legal Office
- Consultant (possible)
- Real Estate Office (possible)
- Planning/Zoning Office (possible)

Steps to Issuing RFP

THE FLORIDA HOUSING COALITION



RFP Issuance



RFP Vendor Invitation
(Advertisement)



Bid Meeting Mandatory
or Voluntary



RFP Deadlines



Vendors Questions

THE FLORIDA HOUSING COALITION



RFP Specifics for Vendor



Timeline for the RFP



Submission due date and time



Instructions on delivery



Rules for communicating



Required documents and content in their submission



Pertinent information about who will reply to response

Timeline for RFP

- RFP launch date
- Due date for questions from vendors
- Date answers will be provided from your team
- Date, time, and location of bidder's conference (if applicable)
- Due date of the RFP
- Announcement of finalists
- Date of finalist presentations
- Final award



Elements in RFP

Establish criteria

Scoring rubric

Appoint scoring committee

Scoring instructions

Instructions of Evaluation

Final Selection

What Criteria is Identified in RFP?

- Applicant experience and construction experience
- Experience of development team
- Management experience
- Financial feasibility to complete and operate
- Applicant former compliance
- Cost reasonableness
- Resident Programs
- Energy Efficiency

RFP Criteria

- Long Term affordability (50 years)
- Set-aside at risk population (5%)
- Maximum economic impact
- Lift to neighborhood, revitalization
- Proximity to transportation, transit, services and employment
- Leveraging of funds
- Ability to meet FHFC requirements for contribution to be part of permanent financing

RFP Components

- Detailed description of funding or land being offered
 - Amount (total available and per project/per unit limits)
 - Target population
 - Tenure
 - Who is eligible to apply
 - Funding timeline

RFP Components

- Applicant information
 - Name of entity
 - Evidence the entity exists
 - Articles of Incorporation
 - 501c3 Letter
 - EIN
 - Mission/Vision statements
 - Job descriptions/resumes of key staff
 - Staff Organization Chart
 - List of Board Members with short description of expertise

RFP Components

- Applicant Information continued
 - If joint venture or partnership
 - Ownership chart
 - MOU, Development Agreement or other formal agreements previously executed
 - Audited financial statements (at least 2 years)
 - Current profit/loss statement and balance sheet
 - List of similar projects (if applicable)

RFP Components

- Development Team
 - General Contractor
 - Architect
 - Engineer
 - Property Manager (include information on prior affordable housing experience)
 - Other consultants

RFP Components

- Development information
 - Address/Folio
 - Number of units and tenure
 - Development type (new construction, acquisition/rehab)
 - Target population (family, senior, special needs, etc.)
 - Planned unit mix with income levels served and rent/sales price breakdown
 - Photos of the site
 - Site plan (if available)
 - Planned on-site amenities and services

RFP Components

- Financial information
 - Development Pro Forma
 - Operating Pro Forma (indicate ability to cover all anticipated debt service)
 - Commitment letters for other funding sources
- Planning/Zoning/Environmental
 - Letter from Planning/Zoning
 - Any approvals already received
 - Phase 1 evaluation
 - O&M Plans (if available and applicable)
 - Flood zone/radon zone maps

RFP Components

- Other information
 - Recent market study and/or appraisal
 - Recent survey
 - Written agreements with service providers
 - Letters of support from other community stakeholders
 - If applying for FHFC multifamily funding
 - State location within SADDAs, RECAP and/or QCT
 - Proximity map
 - Proximity scoring

The Scoring Process

THE FLORIDA HOUSING COALITION



Scoring

- Transparent proceeding
- Scoring team- experience, confidentiality, thorough review
- Division of labor within sections – qualifications, numbers, site characteristics
- Scores- are there outliers?
- How to reconcile outlying results?
- Eliminate vendors scoring lower than average

The Interview Process



Interviewers



Public process



Develop list of follow-up questions from interviews and receive responses

THE FLORIDA HOUSING COALITION



Evaluating Submissions

THE FLORIDA HOUSING COALITION



Evaluating the Applicant

- Does the applicant meet minimum threshold requirements for local funding (i.e. nonprofit in existence for at least two years with affordable housing as part of its mission)
- Does the applicant meet minimum threshold requirements for other proposed funding sources?

Evaluating the Applicant

- Financial Capacity
 - Audited Financial Statements indicate stable finances with strong internal controls
 - Ability to guarantee financing
- Track Record
 - Has applicant completed a similar project before
 - Status of previously funded projects

Evaluating the Site



Readiness to Proceed



Site Control- evidenced by deed, contract, long term lease



Ground leases need to be for period of affordability



Utilities



Environmental



Zoning and Land Use



Neighborhood Considerations

Site Evaluation: Housing, Economic Development and Social Services

- Location of proposed development
 - Desirability of neighborhood
 - Jobs
 - Transportation
 - Schools
 - Shopping
 - Healthcare
 - Access to other service providers
 - Location within geography for local initiatives
- Location in relation to similar developments

How the project benefits the community

- Target market served
 - Is it an underserved market
 - Is this population a community priority
- Does it promote stated goals in planning documents
 - Housing Element of comprehensive plan
 - Land Use
 - Consolidated Plan/Assessment of Fair Housing

How the project benefits the community

- Does the project promote economic development goals
 - Job creation
 - Focus of other public investments
 - Geographic area of opportunity
- Are there agreements with service providers
- Is there general community support

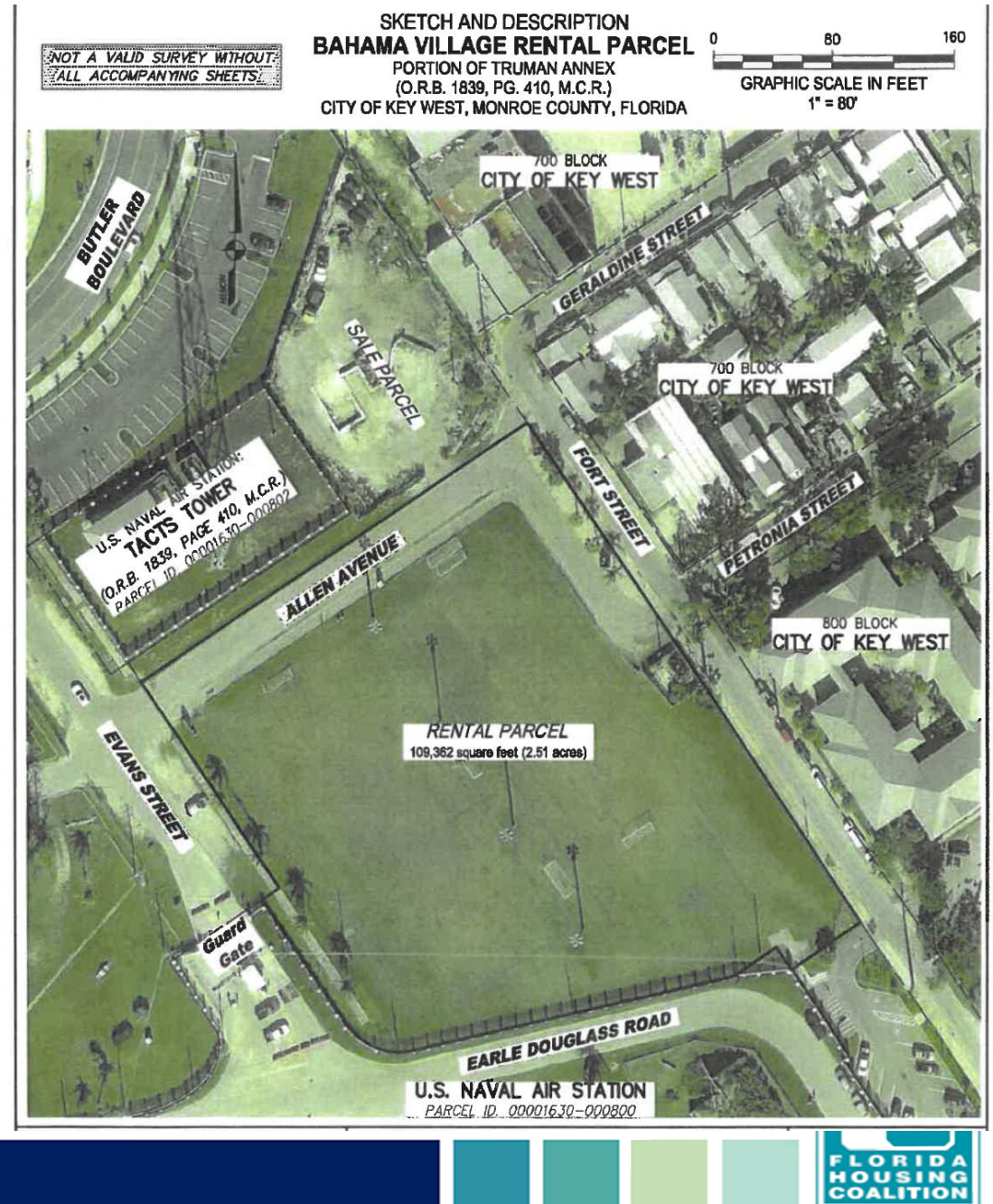
Feasibility: Market Analysis

- Occupancy of similar developments
- Current condition and trajectory of neighborhood
- How proposed development compares to like developments
- Key items in Market Study
 - Anticipated absorption rate
 - Rents or sales prices

Making the Final Selections

- Complete final review
 - Written Proposal
 - Interview and follow-up questions
 - Scores from Review Committee
 - Facilitator compiles all the scores
- Provide preliminary awards on conditions of:
 - BOCC/Council Approval (if required)
 - Firm commitment of other funding
 - Provision of any necessary information not provided in original application

Bahama Village Affordable Workforce Housing RFP



Outline for Process Summary Guide

- Overview of Responsible Staff and Departments
- Background of Project
- Schedule for RFP Process
- Sample Project Descriptions including project type, target market, tenure
- Sample scoring and evaluation rubric
- Marketing and Outreach Plan
- Review of Existing City Procurement Requirements



Sequence of RFP Planning

- Fact Sheet: Bahama Village 3.2 Acre Redevelopment – for discussion
- Community Meetings
- Description of Project and Scope
- RFP Schedule
 - Issuance of RFP
 - Mandatory Pre-Proposal Conference
 - Deadline for Questions
 - Deadline for Answers
 - Deadline for Proposals
 - Proposal Evaluation Period
 - Proposer Selection by Committee
 - Final Selection Commission Approval

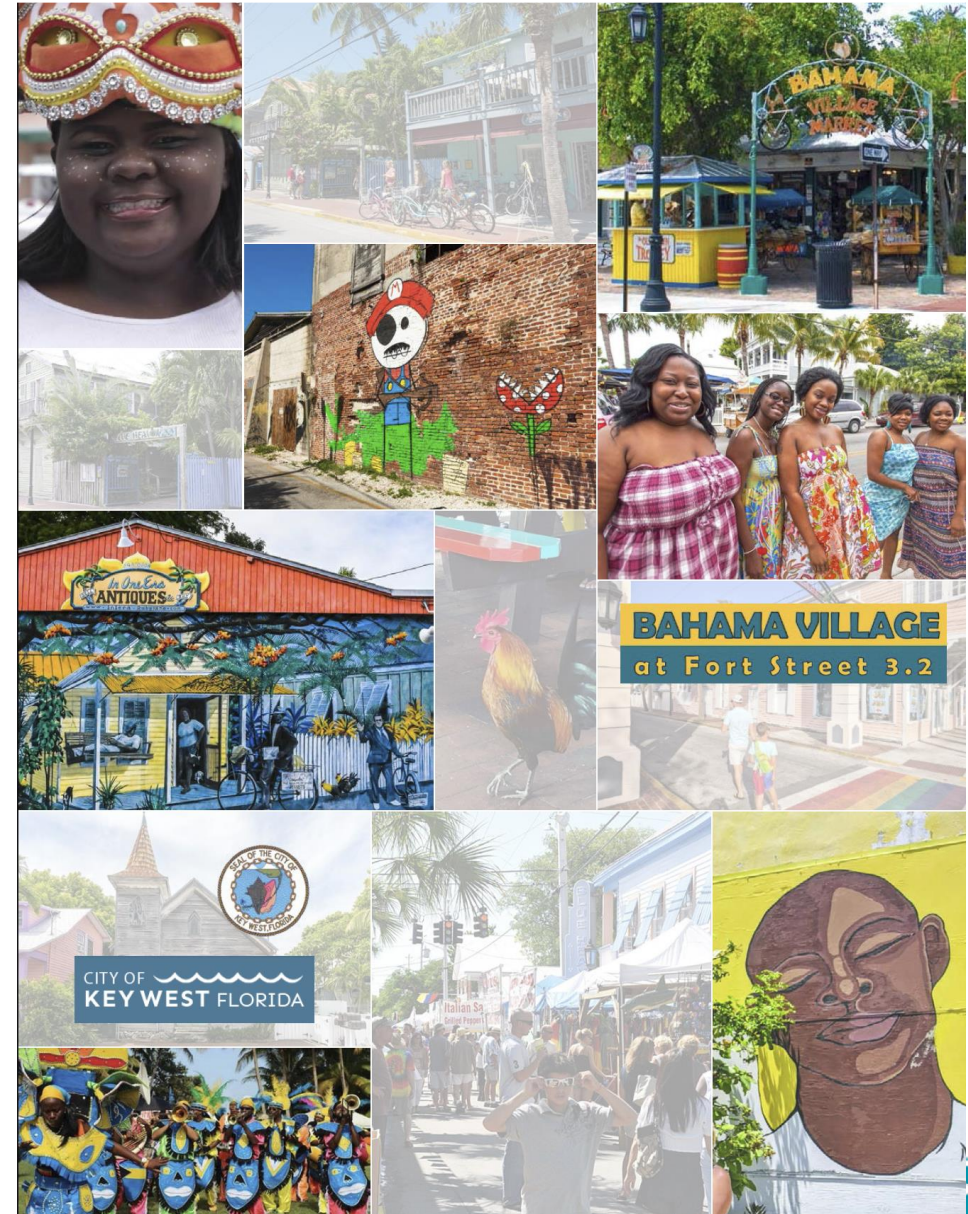


THE FLORIDA HOUSING COALITION



RFP Outline

- A. Cover Page
- B. Table of Contents
- C. General Information/Introduction
- D. Proposal Requirements
- E. **Pre-Proposal Conference**
- F. RFP Schedule
- G. Proposal Evaluation
- H. Selection Criteria
- I. Eligible Applicants
- J. Scope of Work/Project Description
- K. Other Scope Requirements
- L. Insurance Requirements



Forms and Affidavits

- Proposer's Qualifications Statement
- City Staff Selection Matrix
- Anti-Kickback Affidavit
- Non-Collusion Affidavit
- Florida Statutes on Public Entity Crimes
- Indemnification Form
- Equal Benefits for Domestic Partnership
- Cone of Silence Affidavit
- Proposer Checklist

WEST FLORIDA

CONCEPTUAL SITE PLAN



APPENDIX

- Site Map
- Site Survey
- Environmental Information
- Bahama Village Truman Waterfront Zoning
- Set Aside Resolution
- Bahama Village Visioning and Capital Projects Workplan
- Arts and Culture Master Plan for Truman Waterfront Park
- Procurement Requirements
- FHFC Income Limits etc.



BUILDING A, NORTH-EAST ELEVATION



BUILDING C, NORTH-EAST ELEVATION

THE FLORIDA HOUSING COALITION



RFP # 008-21 Bahama Village “3.2”

Affordable Workforce Housing Project

- 30 day response period
- Deadline allows time for FHFC RFA SAIL Workforce Monroe County
- Site of pivotal importance to City of Key West and Bahama Village
- Strong racial inclusivity component
- Intent to stabilize Bahama Village with housing and businesses
- Mixed use- rental, ownership, retail

THE FLORIDA HOUSING COALITION



- “...intelligent planning and design features that honor and enrich the surrounding community, its history, and its historic architecture.”
- “Diversity, inclusion, and equity in access to housing, government contracting, and small business development are also highly valued in this process.”

3. Evaluation Criteria

- 1) Quality, clarity, and responsiveness of the proposal in conformance with submission requirements outlined below.
- 2) Capability of providing administrative, professional, and technical resources for the services requested.
- 3) Financial planning capabilities of the proposer.
- 4) Past performance in providing affordable housing developments.

Process Documents

- Sign in Sheet –name, company, phone, email
- Proposer Memo- who submitted -bids opened
- Addenda for questions and answers
- Evaluator Instructions
- Score Sheet





LOFTS AT BAHAMA VILLAGE

ORIGINAL

City of Key West, Florida
RFP # 008-21

BAHAMA VILLAGE "3.2" Affordable Workforce Housing Project

October 20, 2021

Submitted To:
City Clerk
City of Key West
1300 White Street
Key West, FL 33040



VESTCOR

1



City of Key West RFP 008-21

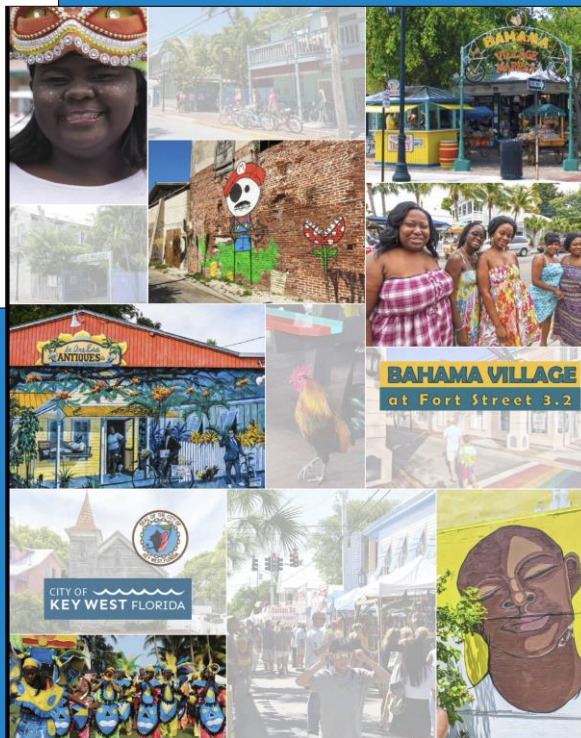
Proposal To City of Key West RFP # 008-21 BAHAMA VILLAGE "3.2" Affordable Workforce Housing Project



From
Oikos Development Corporation
Coral Sky Development

October 20, 2021

1



Turnstone
DEVELOPMENT



City of Key West, Florida

REQUEST FOR PROPOSALS

RFP # 008-21

BAHAMA VILLAGE "3.2"

Affordable Workforce Housing Project

Submitted To:
City of Key West, Clerk's Office
1300 White Street
Key West, Florida 33040

Submitted By:
Turnstone Development Corporation 64 W. North
Avenue, Suite 100
Northlake, Illinois 60164

GORMAN & COMPANY

RESPONSE TO
BAHAMA VILLAGE "3.2"
AFFORDABLE WORKFORCE
HOUSING: RFP #008-21

October 20, 2021

Selection/Ranking Committee Instructions

- Evaluation and scoring to be conducted BEFORE the Selection Committee meeting
- At meeting, facilitator to conduct formal scoring at City Commission meeting for permanent record
- Conflict of interest – contact immediately
- Do not discuss with proposers
- Only evaluate based on Proposal content
- Cone of silence- other members, staff, media, stakeholders

Selection/Ranking Committee Instructions

- Proposers invited to final scoring meeting to answer questions
- Evaluators receive proposals day of deadline – given 7 days to evaluate- independently
- Facilitator prepares final scoring matrix and determines highest ranking proposal
- Results sent to City Commission via Legistar
- City Commission meeting- selection

SELECTION/RANKING CRITERIA	POINTS ALLOWED
Proposer's history and experience in performing similar projects (including subconsultant teams) through examples and references.	0-10
Conceptual site plan that captures all the elements and considerations described in the scope.	0-10
Proposed rental rate schedule including the unit mix, number of units, income levels served, & flexibility for lower income families. (Reference Section J)	0-25
Permanent affordability measures for owners and renters. Marketing plan for existing resident priority.	0-10
Depth of expertise in historic preservation	0-10
Financial packaging & Leverage of proposal	0-15
Connectivity, Landscape/streetscape, public art	0-5
Public participation methodology and expertise	0-5
Inclusion of Minority and Women Owned Business Enterprises	0-5
On-site Amenities Proposed	0-5
Total Points	0-100

EXPERIENCE OF TEAM	0-10	0	
Acceptable	2-5	0	Development team generally shows significant experience in housing development.
Advantageous	6-8	0	Development team has specific experience in both affordable ownership and rental housing.
Highly Advantageous	9-10	0	Development team has produced a combined project containing both rental and ownership units.
Criteria Score		0	
CONCEPTUAL SITE PLAN DESIGN	0-10	0	
Acceptable	2-5	0	Conceptual site plan addresses surrounding design elements for the 3.2 acre site at a basic level.
Advantageous	6-8	0	Conceptual site plan incorporates cost effective and attractive design elements that asthetically connect to the 3.2 acre site.
Highly Advantageous	9-10	0	Conceptual site plan, design renderings and elevations have been provided that express superior urban design features which celebrate the area's history and significance.
Criteria Score		0	

HOUSING COSTS, UNIT MIX, RENTS ETC.			
	0-25	0	
Acceptable	2-5	0	Proposal provides a basic set of development and operating budgets.
Advantageous	6-10	0	Proposal provides more detailed development and operating budgets but unit mix falls a little short on city's goals for Bahama Village residents. (See page 10-11 of RFP)
Highly Advantageous	10-15	0	Proposal provides a unit mix that meets the city's goals and provides good detail in the development and operating budgets. (See page 10-11 of RFP)
Exceptional Approach	16-25	0	Proposal provides an aggressive timeline for financing, design, approval, construction and marketing of units. Significant detailed analysis of the development and operating budget is presented. Meets the intent of the city goals of 30% ownership and 70% rental units.
Criteria Score		0	
PERMANENT AFFORDABILITY			
	0-10	0	
Acceptable	2-5	0	Proposal addresses the minimum affordability period of 50 years.
Advantageous	6-8	0	Proposal suggests using a 99 year affordability period.
Highly Advantageous	9-10	0	Proposal discusses how to achieve long term homeownership affordability by partnering with an existing organization with a development track record and who's corporate mission is to create permanently affordable housing units.
Criteria Score		0	

THE FLORIDA HOUSING COALITION



HISTORIC PRESERVATION EXPERTISE	0-10	0	
Acceptable	2-5	0	Proposal shows at least one infill project in a historic district or additions/alteration work involving a historic structure
Advantageous	6-8	0	Proposal shows significant experience developing housing within historic districts or development projects involving historic structures
Highly Advantageous	9-10	0	Proposal includes and surpasses the aforementioned categories and details a compelling vision with state of the art energy efficiency and urban design features fully integrated within the historic context.
Criteria Score		0	
FINANCIAL PACKAGING & LEVERAGE	0-15	0	
Acceptable	2-5	0	Proposal reflects at least 15 years experience in development, construction and property management, neighborhood revitalization and using multiple sources of funds for affordable housing; leveraging at least two sources of funds.
Advantageous	6-8	0	Proposal reflects above 15 years experience with multiple developments completed with funding sources over and above the LIHTC & SAIL rental housing programs.
Highly Advantageous	9-10	0	Proposal reflects substantial neighborhood redevelopment experience in urban settings and with leveraging funding resources for homeownership and rental.
Exceptional Approach	11-15	0	Proposal approach shows creative use of resources to meet and exceed the city's goal of homeownership and rental for the 3.2 acre site.
Criteria Score		0	

THE FLORIDA HOUSING COALITION



CONNECTIVITY, LANDSCAPE/STREETSCAPE/PUBLIC ART			
	0-5		0
Acceptable	2	0	Conceptual site plan and design addresses surrounding design elements at a basic level.
Advantageous	3	0	Conceptual site plan and design incorporates surrounding design elements for the 3.2 acre site.
Highly Advantageous	4	0	Conceptual site plan and design expresses rich urban design features which combine elements of history, local design vernacular and compatibility.
Exceptional Approach	5	0	Conceptual site plan and design renderings and elevations depict visionary urban design that incorporates walkable connectivity, public art, integrated streetscape and landscape features at the 3.2 acre site.
Criteria Score		0	
PUBLIC PARTICIPATION METHODOLOGY			
	0-5		0
Acceptable	2	0	Proposal provides for a project webpage for updating the public.
Advantageous	3	0	Provides offers multiple options to engage the community and keep them informed.
Highly Advantageous	4	0	Proposal demonstrates experience and commitment in working with the community group and efficiently addressing concerns identified in the RFP.
Exceptional Approach	5	0	Proposal provides an approach that incorporates a robust marketing campaign integrated with updates at regular intervals through community meeting attendance, social media, website, local government tv ads etc.
Criteria Score		0	

ON-SITE AMENITIES		0-5	0
Acceptable	2	0	Proposal meets the minimum requirements of the FHFC RFAs for housing credits.
Advantageous	3	0	Proposal identifies amenities that will provide considerable enhancement to the lives of the residents in the housing.
Highly Advantageous	4	0	Proposal identifies specific organizations to support the existing area residents and connect them to new opportunities for growth.
Exceptional Approach	5	0	Proposal describes a marketing plan to ensure current Bahama Village residents are provided opportunities to participate in this housing with services available to further their financial future.
Criteria Score		0	
Total Points		0	

THE FLORIDA HOUSING COALITION



SITE PLAN

Building A - Residential (For-Lease)		
Unit Type	# of Units	Unit Size
1 BR / 1 BA	32	640-762 sf
2 BR / 2 BA	31	900-1,022 sf
3 BR / 2 BA	11	1,096 sf

Building B - Residential (For-Lease)		
Unit Type	# of Units	Unit Size
1 BR / 1 BA	8	640-762 sf
2 BR / 2 BA	8	900-1,022 sf
3 BR / 2 BA	8	1,096 sf

Building C - Homeownership		
Unit Type	# of Units	Unit Size
2 BR / 2 BA	18	900-1,022 sf
3 BR / 2 BA	10	1,096 sf



LOFTS AT BAHAMA VILLAGE



LOFTS AT BAHAMA VILLAGE

ORIGINAL

City of Key West, Florida

RFP # 008-21

BAHAMA VILLAGE "3.2" Affordable Workforce Housing Project

October 20, 2021

Submitted To:

City Clerk

City of Key West

1300 White Street

Key West, FL 33040



VESTCOR



Rental Unit Mix

Beds/Baths	No. of Units	Median Income %	Max Rents
1/1	4	25%	\$ 476
2/2	5	25%	\$572
3/2	2	25%	\$661
1/1	17	60%	\$1,144
2/2	17	60%	\$1,374
3/2	6	60%	\$1,587
1/1	12	80%	\$1,526
2/2	13	80%	\$1,832
3/2	5	80%	\$2,116
1/1	8	120%	\$2,289
2/2	9	120%	\$2,748
3/2	4	120%	\$3,174
Totals	102		

THE FLORIDA HOUSING COALITION





Condominium Unit Mix

Set-Aside (For Sale)				
Beds / Bath	60%	80%	140%	Total
2/2	2	5	5	12
3/2	0	1	3	4
Total	2	6	8	16

Maximum Sales Price					
Beds / Bath	County Median Income*	Ratio	60% AMI	80% AMI	140% AMI
2/2	\$84,400	4.25	\$215,220	\$286,960	\$502,180
3/2	\$84,400	4.75	\$240,540	\$320,720	\$561,260

*As of 4/1/2021

THE FLORIDA HOUSING COALITION



FHFC RFA 2022-208 SAIL Financing for the Construction of Workforce Housing in Monroe County

- Serves up to 140% AMI
- 30 units <80% AMI, 21 <120% AMI
- 51 units < 60% AMI, 11 < 25% AMI
- Lofts at Bahama Village only applicant
- \$1,800,000 4% Low Income Housing Tax Credits
- \$5,520,000 Workforce SAIL funding
- 98 rental units (plus 16 owner units) 9,000 sf retail
- Developer: TVC Development
- Manager: AH Housing Services

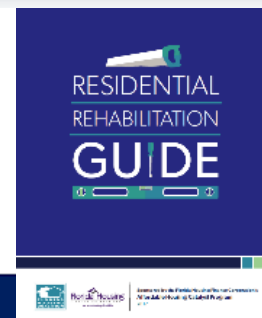
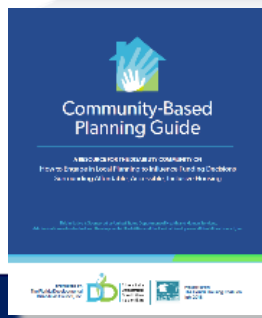
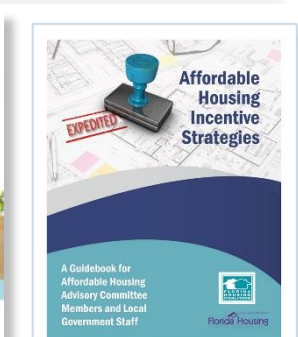
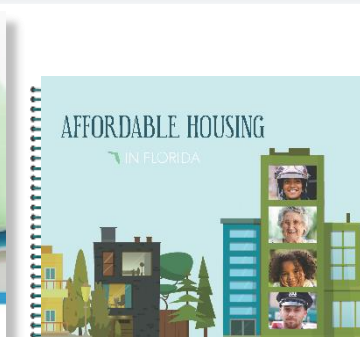
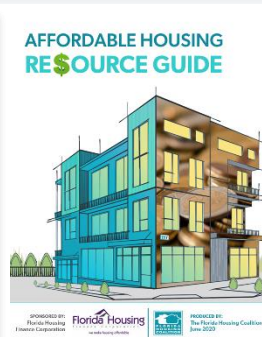
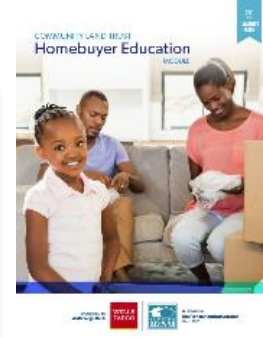
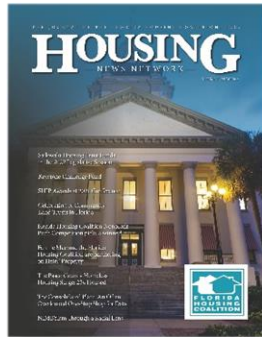
THE FLORIDA HOUSING COALITION





FLORIDA HOUSING COALITION PUBLICATIONS

Access these valuable resources and more
under the Publications tab at Flhousing.org



Other Upcoming Trainings

- June 21: Data Driven Planning
- June 23: RFP Process Part 3
- June 28: Long-term Affordability and Understanding Deed Restrictions
- To Register, visit <https://flhousing.org/events/>



Conference Registration Now Open

<https://conference.flhousing.org/>

ANNUAL STATEWIDE HOME MATTERS CONFERENCE

AUGUST 29-31

IN-PERSON AT THE ROSEN CENTRE, ORLANDO FL

[REGISTER](#)

<https://fhc.wildapricot.org/event-4693298>

SAVE THE DATE

AUG 29-31 ORLANDO, FL
www.flhousing.org

HOME
MATTERS

More questions? Need help with a project? Just ask!

- Technical Assistance Hotline
800-677-4548
www.flhousing.org
- Tamara West
850-518-2235
west@flhousing.org
- Gladys Cook
813-830-3450
cook@flhousing.org



THE FLORIDA HOUSING COALITION

