

## **PROCUREMENT GUIDE**

**Project Name:**

Gosinski Park

**Project Location:**

Plymouth, CT

**Date:** July 13, 2015

**Due Date:** July 31, 2015

### **Procurement for Competitive Negotiations**

The Plymouth Housing Authority (PHA) will adhere to the following procurement procedure for the above referenced project. This procurement procedure will allow for a competitive selection process to be used to evaluate and select a Consulting Firm to assist in Development Consulting for Gosinski Park development located in Plymouth, CT.

1. PHA shall solicit Request for Proposals (RFP) from Development Consulting firms. Solicitation of Housing Development Consulting services (Exhibit 1) will be distributed to various entities and organizations thorough out the Connecticut region.
2. PHA will establish a selection committee to screen and evaluate RFP responses. The selection committee may include, but not limited to, members of the Board of Directors and/or Staff of PHA as well as other professionals working on the project or local based stakeholders.
3. The selection committee shall evaluate all criteria included in the RFP Package and rank each Firm based on the ranking sheet as well as fee. A minimum of the three highest qualified firms shall be selected to sit for interviews and provide additional information on their background and fee proposal for the proposed activities.
4. The final selection shall be made based principally on experience with similar developments, fee structure and capacity to complete the tasks in a timely manner.
5. Owner reserves the right to reject the selected services if the amount at the time of fee proposal is not within budget and solicit new proposals from a new Housing Development Consulting Firms.
6. Owner reserves the right to have legal counsel review the selected Housing Development Consulting Services RFP packages and proposals.

**Housing Development Consulting Services Selection Timeline**

- Request for qualifications Notice July 13,2015
- Question to RFP Due July 22, 2015
- RFP Responses Due July 31, 2015
- Minimum of Three firms Selected for Interviews August 17, 2015
- Interviews August
- Selection of Final Firm September 1, 2015
- Contract Negotiated and Signed September 15, 2015

## **Exhibit 1**

**Project Name:**

Gosinski Park

**Project Location:**

Plymouth, CT

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### **Request for Proposal Notice**

The Plymouth Housing Authority (PHA) is soliciting Request for Proposal (RFP) to allow for a competitive selection process to be used to evaluate and select a Development Consulting Firm to assist in the feasibility analysis, development team selection and submission of financing applications for the Gosinski Park development located in Plymouth, Connecticut.

**RFP Package:** Housing consulting firms who wish to be considered and have the experience and capacity to provide the required services shall obtain a copy of the full RFP submission instructions from **Kent Lewis** via e-mail to [Kent@Housingdevelopmentteam.com](mailto:Kent@Housingdevelopmentteam.com) or calling 203-345-9021.

**Questions:** All questions regarding the Development or the RFP submission should be directed to Kent Lewis via e-mail to [Kent@Housingdevelopmentteam.com](mailto:Kent@Housingdevelopmentteam.com) on or before **July 22, 2015, at 5:00 pm.**

**Request for Proposal Submission:** RFP submissions shall be delivered to Kent Lewis via e-mail to [Kent@Housingdevelopmentteam.com](mailto:Kent@Housingdevelopmentteam.com) on or before **July 31, 2015 at 12:00 pm.**

Owner reserves the right to accept any submittal or to reject any submittal and to waive any informalities or irregularities in the submittal.

Plymouth Housing Authority is an Affirmative Action/Equal Opportunity Employer and small, minority and woman owned businesses are encouraged to apply.

## **Exhibit 2**

**Project Name:**

Gosinski Park

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### **Request for Proposal Instructions**

**Submission Information and Selection Criteria:** Interested Consulting Firms shall submit information as outlined below and selection of approved Consulting Firms shall be based on the submission and review of the information. A selection committee will be established to review the information submitted, verify the information submitted, contact references and interview Consulting Firms as the committee may require. The selection committee may include but is not limited to, members of the Board of Directors and Staff or owner/developer and design professionals working on the project. The selection committee shall evaluate all criteria included in the RFP Package and rank each Consulting Firm based on the ranking sheet. A minimum of three qualified Consulting firms shall be selected to sit for interviews. The final selection shall be made based principally on experience with similar developments, fee structure and capacity to complete the tasks in a timely manner.

**Interested firms should submit a cover letter along with the following information:**

1. A brief resume and brochure of the firm. Information must include firm address, contact information, website, principals and staff. Also include Background, experience and Proposal of principal members, including officers and personnel
2. Minority or Women owned business documentation
3. Contracts on hand with anticipated dates of completion and projects completed in the past 5 years.
4. Current Client list & List of references relating to the contracts on hand and projects completed.
5. Experience & Examples of completed projects working with:
  - Housing Authorities
  - Non-profit organizations
  - Connecticut Housing Finance Authority (CHFA)
  - Connecticut Department of Housing (DOH)
  - 4% LIHTC Developments
  - 9% LIHTC Developments
6. Has the responding professional/company ever had declared or are now declared ineligible, suspended, or debarred from any local, state, or federal entity procurement listing? If yes please explain in detail.
7. Has the firm or any individual in your organization ever sued or been sued by any local, state, or federal government entity? If yes please explain in detail.
8. Typical Fee Structures/Hourly Rates and **Fee Proposal** for Scope outlined in Exhibit 3.

### **Exhibit 3**

**Project Name:**

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**Housing Development Consultant Scope of Work:  
SSHP 4% LIHTC**

*Please provide a fee proposal for the following scope of work:*

**State Sponsored Housing Portfolio Recapitalization Funding and (4%, LIHTC) Consolidated Application**

- Review and Evaluate current financial profile of development based on proformas previously developed.
- Assist Owner in establishing Biznet accounts through the Biznet portal.
- Attend various meetings and conference calls with funders, attorneys, stakeholders, equity investor and owner
- Provide owner with basic information regarding the Connecticut Housing Finance Authority (CHFA) and State Sponsored Housing Portfolio recapitalization funding and applicable financing terms, objectives, policies and procedures
- Work with the current development team members in place and assist owner in securing all other professionals necessary for this financing application including the tax credit equity investor.
- Prepare Proforma based on current financing, development budget, operating budget and other financial underwriting and forms for application including the RAP rent roll & Income & Expense comparison.
- Prepare Work Plan and actively manage activities needed to complete for successful application
- Preparation of Consolidated Application and checklist items for the SSHP Recapitalization funding
- Preparation of Consolidated Application and checklist items for the 4% LIHTC Program
- Review and evaluate the competitive score of the development's application for financing.
- Establish competitive strategy for funding approvals.
- Additional fact finding both internal and external as needed.
- Coordination with owner, architects and other professionals to complete all required exhibits.
- Assist with any approvals needed for application.
- Assist in procurement process for General Contractor bidding or construction cost estimation necessary for the financing application
- Assist PHA in preparation of other CHFA and DOH requirements including but not limited to tenant selection plans, procurement plans, affirmative fair housing documents, management plans and marketing plan.
- Submit completed the next funding application through for financing State Sponsored Housing Portfolio Recapitalization Funding and 4%, LIHTC to DOH and CHFA late 2015 or early 2016.

**Qualifying Statements:**

- *This scope does not include additional third party costs for Accounting, Support Services, Architectural, Appraisals, Market Studies, CNAs, Legal or other third party costs outside the scope of this development.*

**Exhibit 4**

*See Attached Selection Criteria Ranking Sheet*

# *Plymouth Housing Authority (PHA)*

## *Gosinski Park*

### *Development Consultant RFQ/RFP Rating and Ranking*

<b>ID</b>	<b>Category</b>	<b>Description</b>	<b>Point Range/ Available</b>	<b>Max Points</b>
1	Complete Response	Responded to all Requests and Questions	0 - 10	<b>10</b>
2	Local Firm	Located within 15 miles of Plymouth (5 points) Located in Connecticut (3 points)	0, 3, 5	<b>5</b>
3	Minority Owned Firm	Must provide current documentation	0, 5	<b>5</b>
4	WBE Owned Firm	Must provide current documentation	0, 5	<b>5</b>
5	Conflict of Schedule	Does firm have capacity to assist PHA without Conflicts	0 - 5	<b>5</b>
6	References	Positive References from other similar organizations as PHA or funders	0 - 10	<b>10</b>
7	Similar Contracts /Scope	Provided similar scope of services in past	0 - 10	<b>10</b>
8	Consulted on 9% LIHTC developments	Based on quantity and role in previous developments	0 - 5	<b>5</b>
9	Consulted on 4% LIHTC developments	Based on quantity and role in previous developments	0 - 10	<b>10</b>
10	Consulted on developments utilizing DOH Funding	Feasibility (2 point) Financing Commitments (2 point) Financing Closings (4 points) Completions (2 point) (each item added for max points)	0 - 10	<b>10</b>
11	Consulted on 10 developments utilizing CHFA Funding	Feasibility (2 point) Financing Commitments (2 point) Financing Closings (4 points) Completions (2 point) (each item added for max points)	0 - 10	<b>10</b>
12	Consulted on Public Housing Developments	Feasibility (1 point) Financing Commitments (1 point) Financing Closings (2 points) Completions (1 point) (each item added for max points)	0 - 5	<b>5</b>
13	Consulted on Developments with Rental Assistance	Based on quantity and role in previous developments	0 - 5	<b>5</b>
14	Affirmative Action Commitment and Achievements	Affirmative Action Plan (0-5 points) Proof of Achievements (0-5 points)	0 - 5	<b>5</b>
<b>TOTAL Points</b>				<b>100</b>