



**REQUEST FOR QUALIFICATIONS (RFQ)  
RFQ: FY 2025-01-CDs**

**Co-Developer Partner(s)**  
Version 1.3.25

**REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)**

**Table of Contents**

[Table No. 1]

Section	Description	Page
	Introduction	3
	RFQ Information at a Glance	5
1.0	The Agency’s Reservation of Rights	5
2.0	Scope of Work/Technical Specifications	6
2.1	Pertaining to the Successful Proposer	6
2.2	Anticipated General Scope of Services	7
2.3	Potential Development Locations	7
2.4	Background Information	7
2.5	The Role of the Selected Developer Partner	8
2.6	The Developer’s Anticipated Qualifications/Experience/Expertise	13
2.7	Role of the Agency	14
2.8	Full Disclosure	16
2.9	Previous/Current Contractor(s)	17
3.0	Proposal Format	17
3.1	Tabbed Proposal Submittal	17
3.2	No Fees Proposed	23
3.3	Proposal Submission	23
3.4	Proposer’s Responsibilities – Contact with the Agency	24
3.5	Proposer’s Responsibilities – Equal Employment Opportunity and Supplier Diversity	25
3.6	Pre-proposal Conference	27
3.7	Recap of Attachments	27
4.0	Proposal Evaluation	28
4.1	Evaluation Factors	28
4.2	Evaluation Method/Plan	30
5.0	Contract Award	33
5.1	Contract Award Procedure	33
5.2	Contract Conditions	33
5.3	Contract Period	34
5.4	Licensing and Insurance Requirements	34
5.5	Contract Services Standards	35
5.6	Prompt Return of Contract Documents	35
	Index of Tables	35

# REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)

## INTRODUCTION

Beaufort Housing Authority (BHA or Agency) is a public entity that was created in 1968. BHA currently operates 293 units of Public Housing across seven sites and has 647 Housing Choice Vouchers which includes 28 Veterans Affairs Supportive Housing Vouchers (VASH). BHA also owns 13 single-family homes that were financed with Neighborhood Stabilization Program Funds. In addition, BHA has an affiliate organization named Lowcountry Housing and Redevelopment Corporation (LHRC) which owns 30 units of housing serving low to moderate income individuals and families.

BHA's Public Housing Property Profile:

Property Name	Location	# of units
Sandalwood Terrace	8 Southwood Park, Hilton Head Island, SC	80 w/2 non residential
Marsh Pointe	1730 Greenlawn Drive, Beaufort, SC	30
Oak Hill Terrace	1650 Ribaut Rd, Port Royal, SC	38
Yemassee Heights	21 Castle Hall Rd, Yemassee	50
Scattered Sites	Downtown Beaufort	63
Scattered Homes	County limits	30

**BHA is seeking a Developer Partner(s) to partner in the redevelopment of two of its Public Housing Sites (each a "Site" or "Project"); one known as Sandalwood Terrace, and one known as Marsh Pointe.**

BHA's goal for both properties is to first, improve the living conditions for residents by demolishing and reconstructing new units and second, to increase the number of affordable housing units at each site where financially feasible.

The Developer will undertake the tasks necessary to produce a new development that will be an operationally sustainable, strong asset to the community. The successful proposer (the selected "Developer") must demonstrate the ability and experience to implement a comprehensive plan to achieve these goals.

BHA will assist with the redevelopment by obtaining approval from U.S. Department of Housing and Urban Development (HUD) to reposition the public housing subsidy to project-based vouchers (PBV) under a long-term contract. BHA will use a combination of HUD's Rental Assistance Demonstration (RAD) and Section 18 of the U.S. Housing Act of 1937 (Section 18).

The redevelopment of each of these Sites is anticipated to involve the disposition of the site via a ground lease to a newly formed LLC. BHA will continue to enforce the affordability requirements for the new development through the ground lease.

The Authority has a seven-person Board of Commissioners authorized by the laws of the State of South Carolina. The Board of Commissioners is responsible for the development of housing policies and authorization of expenditures.

BHA is committed to providing quality, affordable housing in healthy neighborhoods through Partnerships with our residents and other groups, fostering neighborhood development and opportunities for those we

## REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)

serve to achieve self-sufficiency. BHA receives funding from an Annual Contributions Contract (ACC) from U.S. Department of Housing and Urban Development (HUD) to administer the Section 8 and Public Housing Programs, as well as other affordable housing initiatives.

In keeping with its mandate to provide efficient and effective services, the Agency is now soliciting proposals from qualified, licensed, and insured entities to provide the above-mentioned services to the Agency. All proposals submitted in response to this solicitation must conform to all the requirements and specifications outlined within this document and any designated attachments in its entirety.

**REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)**

**RFQ INFORMATION AT A GLANCE**

[Table No. 2]

AGENCY CONTACT PERSON (NOTE: Unless otherwise specified, any reference herein to “Contracting Officer” or “(CO)” or “Executive Director” (ED) or “Chief Executive Officer” (CEO) shall be a reference to Julie Davis.)	Julie Davis, Executive Director Beaufort Housing Authority 1009 Prince Street Beaufort, SC 29902 (843) 525-7059 (2240) jdavis@beaufortha.com
HOW TO OBTAIN THE RFQ DOCUMENTS	1. PHA Website: <a href="https://www.beaufortha.com/bids-rfps-rfq">https://www.beaufortha.com/bids-rfps-rfq</a>
VIRTUAL Q&A SESSION	January 24, 2025
SUMMARY OF Q&A PUBLISHED	January 28, 2025
HOW TO FULLY RESPOND TO THIS RFQ BY SUBMITTING A PROPOSAL SUBMITTAL	As instructed within Section 3.0 of this RFQ Document, submit sealed 3 copies of your "hard copy" proposal to the Agency Administrative Office.
PROPOSAL SUBMITAL RETURN & DEADLINE	February 18, 2025

**1.0 THE AGENCY’S RESERVATION OF RIGHTS.** The Agency reserves the right to:

- 1.1 Right to Reject, Waive, or Terminate the RFQ.** Reject any or all proposals, to waive any informality in the RFQ process, or to terminate the RFQ process at any time, if deemed by the Agency to be in its best interests.
- 1.2 Right to Not Award.** Not to award a contract pursuant to this RFQ.
- 1.3 Right to Terminate.** Terminate a contract awarded pursuant to this RFQ, at any time for its convenience upon 10 days written notice to the successful proposer(s).
- 1.4 Right to Determine Time and Location.** Determine the days, hours, and locations that the successful proposer(s) shall provide the services called for in this RFQ.
- 1.5 Right to Retain Proposals.** Retain all proposals submitted and not permit withdrawal for a period of 60 days subsequent to the deadline for receiving proposals without the written consent of the Agency Executive Director (ED).
- 1.6 Right to Negotiate.** Negotiate the fees proposed by the proposer entity.
- 1.7 Right to Reject any Proposal.** Reject and not consider any proposal that does not meet the requirements of this RFQ, including but not necessarily limited to incomplete proposals and/or proposals offering alternate or non-requested services.
- 1.8 No Obligation to Compensate.** Have no obligation to compensate any proposer for any costs incurred in responding to this RFQ.
- 1.9 Right to Prohibit.** At any time during the RFQ or contract process to prohibit any further participation by a proposer or reject any proposal submitted that does not conform to any of the requirements detailed herein. By accessing and by downloading this document, each prospective proposer is thereby agreeing to abide by all terms and

## REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)

conditions listed within this document, and further agrees that he/she will inform the CO in writing within 5 days of the discovery of any item listed herein or of any item that is issued thereafter by the Agency that he/she feels needs to be addressed. Failure to abide by this timeframe shall relieve the Agency, but not the prospective proposer, of any responsibility pertaining to such issue.

- 1.10 Right to Reject - Obtaining Competitive Solicitation Documents.** The Beaufort Housing Authority website is the official and appropriate venue to obtain the competitive solicitation documents (and any other information pertaining to the competitive solicitation such as addenda). Accordingly, by submitting a response to this competitive solicitation the respondent thereby affirms that he/she obtained all information from the Beaufort Housing Authority website. Any other group such as a proposal depository that informs potential respondents of the availability of such competitive solicitations are hereby instructed to not distribute these documents to any such potential respondents, but to instruct the potential respondents to visit the Beaufort Housing Authority website to obtain the documents. The Agency may reject without consideration any response submitted from a firm that has not obtained the documents from the Beaufort Housing Authority website.

**2.0 SCOPE OF WORK/TECHNICAL SPECIFICATIONS.** The Agency is seeking proposals from qualified, individuals to provide the Agency with the following Co-Developer Partner services.

- 2.1 Pertaining to the Successful Proposer.** Hereinafter, when talking about the “selected successful proposer,” the Agency may utilize any of the following terms (or any combination of the terms):
- 2.1.1** “Successful Proposer” or “Successful Proposer(s);”
  - 2.1.2** “Selected Firm” or “Selected Firm(s);”
  - 2.1.3** “Developer” or “Developer(s);” or
  - 2.1.4** “Co-Developer Partner” or “Developer Partner(s).”
  - 2.1.5** The terms may be utilized in the “singular” form because the Agency reserves the right to select one firm only to provide the services; or
  - 2.1.6** The terms may be utilized in the “plural” because the Agency reserves the right to select more than one firm to provide services.
  - 2.1.7** Whenever the term is utilized in the “singular,” such requirement may also be applied as if the term has been utilized in the “plural;” meaning, all requirements herein shall apply to any Developer Partner that the Agency may at any time chose to do work with.
  - 2.1.8** Anywhere herein (including within the Attachments listed within the following Table No. 6 herein) when the term “Developer” is utilized, unless specific reference is made to selected firm(s) such term may also mean the

## REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)

same as the terms identified within the preceding Sections 2.1.1 through 2.1.4 herein. It is the responsibility of the prospective or actual proposers to request in writing clarification when there is any doubt as to the application of this requirement (or any other requirements herein).

**2.2 Anticipated General Scope of Services.** The Agency anticipates that the Selected Firm(s) chosen will be an experienced development firm that will direct the development of new housing. The properties below represent the Agency's land assets immediately available for development. The Successful Proposer(s) will be considered to be the Co-Developer Partner(s). It is the intent of the Agency that the Co-Developer Partner(s) will direct all development activities under the oversight of the Agency. It is the intent of the Agency that under non-profit affiliate/instrumentality, the Agency will maintain an ownership interest in any housing. The Agency seeks a Co-Developer Partner(s) that will assist the Agency in both the development and property management areas. The Agency envisions the reintegration of the Sites into the fabric of adjoining neighborhoods through several general phases of development if needed

**2.3 Potential Development Locations.** The locations that the redevelopment may occur at include, but are not limited to, the properties listed in the Introduction section of this document that are not Scattered Sites or Homes.

[Table No. 3 Omitted]

**2.4 Background Information.**

**2.4.1** The Agency desires to select a Developer(s) interested in serving as the Co-Developer Partner(s) to The Agency and requests the submission of qualifications for consideration.

**2.4.2** See attachment I for maps of property available for development.

**2.4.3** The Agency desires to develop mixed income communities with additional housing opportunities that include low and moderate-income residents in Beaufort, Beaufort County located in Coastal South Carolina. It will leverage access to land and proximity to healthcare, jobs and other services and amenities in the Beaufort area of Beaufort County in a public/private partnership with the selected Co-Developer Partner(s).

**2.4.4** The Agency will consider utilizing multiple debt and equity instruments including tax exempt bonds, low-income housing tax credits, conventional mortgage financing, limited partnerships, State funding, HOME funds, FHLB funds, Local funds, CDBG disaster recovery funds, County trust funds, and public/private collaborations as its principal forms of financing to develop additional affordable housing and potentially address other income ranges up to 80% of the Area Median Income. **A major role of the selected Co-Developer(s) will be to identify adequate development funds from available sources and to provide guarantees during the development period.**

- 2.4.5 The Agency wishes to encourage high quality architectural design for all work which will revitalize the area. The Sites will provide amenities commensurate with market rate properties in accordance with state and local ordinances and any requirements of applicable funding applications. These amenities may include a clubhouse with leasing office, “well-care” center, business center, etc.
- 2.4.6 The Agency seeks to incorporate Green Building techniques, increase community safety through environmental design, with ample green space and parking in the design.
- 2.4.7 The Agency does have previous development experience, in addition to a Development Consultant and well-established relationships with local governments, and a good relationship with local officials.

**2.5 The Role of the Selected Developer Partner(s).** Throughout the development of the Project, the Co-Developer Partner(s) will work closely with all stakeholders, including The Agency staff, The Agency public housing residents, the surrounding community, and The Agency consultants. The Co-Developer Partner(s) will be responsible for ensuring that the final master plan for each Project is approved, financed and implemented. The Developer Partner(s) shall be responsible for the following:

**2.5.1 General**

- 2.5.1.1 *Site Selection Validation* - As previously noted, The Agency has identified properties as the primary Sites for the implementation of the Projects. The selected Co-Developer Partner(s) will perform the due diligence necessary to determine if The Agency-identified Sites are viable for purposes of the development process. In the event a Co-Developer Partner does not deem a Site to be viable the Co-Developer Partner will assist with the site selection and acquisition of a cost feasible alternate site.
- 2.5.1.2 *Oversee and Implement Development Efforts* - Provide the necessary staffing, expertise, supervision and guarantees to implement all aspects of the development fully and expeditiously as required by the Master Development Agreement.
- 2.5.1.3 *Hire and Manage Consultants and Contractors Necessary for Planning and Implementation* - Develop a competitive financing application. Procure other consultants and/or contractors and coordinate all tasks necessary for all financing applications, finalization of the master plan, and all implementation tasks. At a minimum, the Co-Developer Partner's team will need to include consultants appropriate to complete funding applications, master planning, architectural, environmental



review, market analysis, geo-technical studies, civil, mechanical and electrical engineering, and any other activities deemed necessary by the Co-Development Partner and The Agency. Respondents are strongly encouraged to demonstrate participation on their team, whether by joint-venture arrangements or otherwise, of local expertise in areas of relevance to the planning and development process, including LIHTC financing and construction matters.

- 2.5.1.4 *Maintain Communication Regarding Project Progress With The Agency, HUD, All Key Stakeholders and The Larger Public* - The Agency will establish a regular schedule of team meetings, in which a Co-Developer Partner will participate. Moreover, the Co-Developer Partner will be responsible for submitting monthly progress reports to The Agency, in such formats and media as The Agency might direct, on the project status and schedule, including but not limited to design, permits, financing, resident coordination, etc.
- 2.5.1.5 *Develop and Maintain Quality Control Measures* - The Co-Developer Partner(s) will be responsible for ensuring the Projects are constructed and managed with the highest quality materials and workmanship. The Co-Developer Partner(s) will be required to implement quality assurance and control measures to ensure effective performance by all parties in all aspects of the program.
- 2.5.1.6 *Develop and Maintain a Detailed Development Schedule and Critical Path Schedule* - Develop and maintain a detailed schedule of events, predicated on financing deadlines that include pre-development activities, construction start, project stabilization and permanent loan close. Develop a Critical Path Schedule for all phases of construction, and lease-up and stabilization.
- 2.5.1.7 *Be Responsive to Local Community and Neighborhood and Governmental Interests* - Promote and maintain good relations with community and neighborhood groups, and federal, state and local governments.
- 2.5.1.8 *Compliance with Laws* - Comply with all applicable federal, state and local laws, rules and regulations applying to the activities required by the Agreement.
- 2.5.1.9 *Debarment* - The Co-Developer Partner(s) must provide evidence that any subcontractor is not debarred, suspended or otherwise prohibited from professional practice by any federal, state or local agency.
- 2.5.1.10 *DBE/MBE/WBE Opportunities* - The Co-Developer Partner(s) will take all necessary affirmative steps to assure that disadvantaged, minority and women-owned business

enterprises are used to the greatest extent feasible in compliance with Presidential Executive Orders 11625, 12138, and 12432, and as promulgated in 24 CFR Part 85. The Agency's goals and expectations are that the selected Co-Developer Partner(s) will meet or exceed 20 percent of the total value of all contracts and subcontracts awarded to qualified minority owned firms, and 5 percent of the total value of all contracts and subcontracts awarded to qualified woman owned firms. The selected Co-Developer Partner(s) shall have a viable program in place to assure the goals are met or exceeded. A monthly report to the Agency will be required by the Co-Developer Partner(s) to accurately demonstrate the level of effort and compliance.

2.5.2 Pre-Development

2.5.2.1 Prepare a Market Analysis Addressing the Residential Components of the Plan - In order to finalize the overall development program, prepare a market analysis that will: assist in determining the proper mix of units and confirm that proposed rents and housing prices are supportable in the local market.

2.5.2.2 Funding and other Applications - The Co-Developer Partner(s) will assist The Agency with preparation of documentation necessary to obtain any and all project approvals from HUD. In addition the Co-Developer Partner(s) will prepare all Low Income Housing Tax Credit and other funding applications that will help to leverage The Agency's investment into the property.

2.5.2.3 Master Planning Process - Plan, coordinate, and lead a comprehensive master planning process that will solicit meaningful input from The Agency and all local stakeholders. It is anticipated the master planning process will take several months with multiple charrettes and will require several versions of site plans, renderings and other media to clearly articulate the master planning options.

2.5.2.4 Prepare Final Master Plans - In consultation with The Agency, the residents and other interested stakeholders, refine the conceptual designs provided by The Agency and ensure that the development design supports the program goals, feasibly achieves the unit counts envisioned, and is acceptable to The Agency, HUD, and the community.

2.5.2.5 Obtain Environmental Clearances - In collaboration with The Agency, procure the necessary consultants and prepare the necessary documents to obtain environmental clearances from all interested agencies.

2.5.2.6 Plans and Specifications - The Co-Developer Partner(s) will be responsible for the preparation of the infrastructure and

building plans and specifications in accordance with The Agency's environmental objectives and design Standards which will be subject to The Agency's review.

**2.5.3 Financing:**

- 2.5.3.1 Produce an Overall Financing Plan - Produce an attainable financing plan for the overall development of a Project. The overall financing plan will be developed in conjunction with the master plan and market analysis. The financing plan must demonstrate a sensitivity and approach in using The Agency funds in the most efficient manner, maximizing leveraging of the HUD funds to the greatest extent possible.
- 2.5.3.2 Prepare the HUD related development documents - Provide required information for the preparation of a development finance proposal. The Agency shall submit the finance proposal to HUD for review and shall prepare the evidentiary documents for which it is responsible and shall make all evidentiary submissions to HUD (as described earlier in the section entitled Role of The Agency).
- 2.5.3.3 Financing Application(s) - In accordance with the Agreement, the Co-Developer Partner(s) will be required to pursue diligently and use best efforts to obtain all financing necessary to implement the master plan in a timely fashion, which may include, but not be limited to, tax credits, tax-exempt bonds, state and local funds and private debt.
- 2.5.3.4 Maximize the Leveraging of Public and Private Resources - Maximize the leveraging of public and private resources by pursuing all reasonable sources of financing and utilizing a variety of partners and partnerships. Take full responsibility for securing all financing sources in a timely fashion. Coordinate discussion and negotiations with financial institutions and private partners. All financing terms are subject to review and approval by The Agency.
- 2.5.3.5 Obtain Financing - Through the use of Low-Income Housing Tax Credits ("LIHTC"), HOME Funds, FHTB funds, Community Development Block Grant Funds, or other state or local funds, and other public or private funding sources, to develop a Project.
- 2.5.3.6 Obtain Equity Investment - Using competitive process, obtain equity financing commitment on the best terms currently available as required by the Agreement and subject to The Agency's approval.
- 2.5.3.7 Guarantees - In accordance with the Agreement, provide all guarantees required for the successful financing of the revitalization effort, including completion guarantees, operating deficit guarantees, and tax credit adjuster or

recapture guarantees and guarantees of performance under the Agreement. The Agency will require that the Co-Developer Partner(s) demonstrate financial ability to honor the guarantees and indicate how they intend to honor the guarantees if necessary.

2.5.3.8 Operating Feasibility - As required in the Agreement, structure such reserves and other devices as will reasonably guarantee the long-term operating feasibility of a Project, utilizing no more subsidy than committed by The Agency.

2.5.3.9 Accounting/Financing - As to be provided for in the Agreement, maintain accounting records and ensure Project financing is available at the appropriate times and utilized in the appropriate manner.

**2.5.4 Construction:**

2.5.4.1 Hire Qualified General Contractors and Oversee Construction Activities - The Co-Developer Partner(s) will create and implement a competitive process for selecting the most qualified General Contractor. During construction, the Co-Developer Partner(s) shall provide oversight, and management as deemed necessary, of construction activities by coordinating with all development team members and attending job-site meetings to ensure the expeditious implementation of construction activities. Regular onsite construction monitoring is critical to the success of a Project; the Co-Developer Partner(s) must have an onsite presence during the term of construction. Any construction management, other than The Agency or investor representatives, are considered Developer overhead and may not be paid with project funds.

2.5.4.2 Facilitate Necessary Site Improvements - Pursuant to the Agreement, the Co-Developer Partner(s) shall initiate and complete site work and infrastructure construction in collaboration with The Agency.

2.5.4.3 Implement Development Program - In accordance with the final master plan approved by The Agency, the Co-Developer Partner will develop all improvements associated with the development program.

**2.5.5 Ownership and Asset Management:**

2.5.5.1 Organize Ownership Entity - Upon completion of the master plan and its acceptance by The Agency, the selected Co-Developer Partner will be expected to organize an ownership entity(ies) and structure(s) approved by The Agency and requirements of other financing sources.

2.5.5.2 Ensure the Short- and Long-Term Viability of the Developed Projects - Co-Developer Partner(s) shall develop and implement marketing, occupancy/re-occupancy, asset and property

management plans that will ensure the short- and long-term viability of the Projects.

2.5.5.3 Select and Oversee a Property Management Firm for the rental units - The Co-Developer Partner(s) shall include a property management firm that meets lender and/or investor qualifications and is committed to building the capacity of The Agency to assume future management responsibility for the mixed finance units.

2.5.5.4 Market and Lease-up the Rental Units - The Co-Developer Partner(s) shall create and implement a marketing and lease-up strategy for the rental units to ensure that stabilized occupancy is achieved in compliance with all applicable financing and land use agreements.

**Additionally, The Agency shall have an option and right of first refusal to acquire a Site in the event a bona fide offer, to purchase the Site, is received by the owner entity or at any time after the expiration of the LIHTC compliance period. Such right and option shall be for a purchase price equal to the minimum required pursuant to Section 42 of the Internal Revenue Code. Such rights shall be set forth in the Partnership Agreement or the Operating Agreement for each owner entity.**

**2.6 Developer’s Anticipated Qualifications/Experience/Expertise.** The Selected Firm(s) shall possess, or within its team provide, the following qualifications and experience (and the following detailed tasks shall also be the responsibility of the Co-Developer Partner(s)):

**2.6.1** Developing tax credit properties with South Carolina State Housing Finance and Development Authority (SC HOUSING). Pursuant to SC HOUSING and any future Qualified Allocation Plan, Developer must have demonstrated experience to receive the maximum points under Developer Experience in the scoring criteria. Firms who do not have this experience must clearly demonstrate how they intend to overcome this requirement in order to submit a competitive low-income housing tax credit application on behalf of the Agency.

**2.6.2** Development of affordable housing and neighborhoods. Experience with public housing mixed finance development, RAD development and working with PHAs. Including managing media and communications plan necessary to respond to political and/ or fair housing issues.

**2.6.3** Leveraging the use of various financing vehicles, including tax exempt bonds, low income housing tax credits, conventional mortgage financing, limited partnerships, State funding, HOME funds, FHLB funds, Local funds, CDBG disaster recovery funds, County trust funds, and public/private collaborations.

## REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)

- 2.6.4 Experience in selection of general contractor in developing housing, especially affordable housing; experience of selection of architect, property manager, and attorney in developing residential and LIHTC/TEB Multifamily, esp. affordable housing.
  - 2.6.5 Expertise in housing developments that incorporates tax credit and affordable housing financing, including project-based vouchering.
  - 2.6.6 Expertise in HUD regulatory compliance issues.
  - 2.6.7 Developing a strategy for fostering Section 3 employment, training, and contracting opportunities throughout the redevelopment process that are consistent with the requirements of Section 3 of the Housing and Urban Development Act of 1968, as amended (12 U.S.C. 1701u) and with the Agency Section 3 Plan.
  - 2.6.8 Taking all necessary affirmative steps to assure that minority and women's business enterprises ("MWBEs") are used to the greatest extent feasible in compliance with Presidential Executive Orders 11625, 12138, and 12432, and as promulgated in 2 CFR §200.317 - §200.326.
  - 2.6.9 Expertise with local government authorities which regulate the permits, rezoning and utilities necessary for new development.
  - 2.6.10 **Expertise in Commercial and Mixed-use development.** The Co-Developer Partner(s) should possess or have team members with strong experience in commercial and mixed-use development as well as affordable housing. Agency expects that some commercial and/or mixed-use development may be included with the redevelopment activities.
  - 2.6.12 **Obtaining Environmental Clearances.** In collaboration with the Agency, procure the necessary consultants and prepare the necessary documents to obtain environmental clearances from all interested agencies.
  - 2.6.13 **Plans and Specifications.** The Co-Developer Partner(s) will be responsible for the preparation of the infrastructure and building plans and specifications in accordance with industry standards for market-rate housing. Plans and specifications will be subject to Agency review. PLEASE NOTE: The plans and specifications may be physically prepared by a third-party architect selected by the Developer (with input and/or comment from the Agency).
- 2.7 **Role of the Agency.** The Agency will play the following roles in the planning and implementation of the Mixed-Income Communities Initiative:
- 2.7.1 **HUD Contact.** The Agency will manage and take responsibility for ALL communication with HUD, and the preparation and submission of program documents and evidentiaries and obtain all HUD approvals including but not limited to demolition/disposition approval and mixed-finance approval. However, to the extent any such documents or evidentiaries are within the

## REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)

- particular knowledge or responsibility of the Co-Developer Partner(s), the Agency will expect the Co-Developer Partner(s) to prepare or assist in preparing such documents and evidentiaries as the Agency may direct.
- 2.7.2 Provider of Funding for Leverage Purposes** - The Agency may grant, loan, or otherwise make available to the Co-Developer Partner(s) funds for the development of the affordable units to assist in the leveraging of funds for the overall revitalization effort. The Co-Developer Partner(s) will be required to leverage The Agency funds by securing private and other public funding and to secure all funding for non-public housing units, as well as any supportive services deemed appropriate by The Agency.
- 2.7.3 Provider of Operating Subsidies.** The Agency will make financial contributions toward the cost of operating the revitalized development in the form of federal operating subsidies for the public housing units. The Agency will not provide to the Co-Developer Partner(s) any amount larger than Agency receives from HUD, less an amount it will retain for its monitoring and asset management functions. The provision of the operating subsidies will be contained in a Regulatory and Operating Agreement, the terms of which will be negotiated between the Agency and the selected Co-Developer Partner(s) and approved by HUD. In compliance with federal regulations, Section 8 Project Based Vouchers may be available.
- 2.7.4 Landowner.** It is the Agency's intent to maximize its financial return on the value of the land that serves as the development site.
- 2.7.5 Disposition** - The Agency will assume primary responsibility for the disposition of the site according to HUD regulations as necessary to phase specific owner entities.
- 2.7.6 Monitor Co-Developer Partner's Compliance with Section 3** - The Agency will monitor a Co-Developer Partner's plans and efforts for reaching Section 3 goals and objectives. Section 3 requirements include not only resident employment but also contracting with Section 3 business entities.
- 2.7.7 Monitor Co-Developer Partner's Compliance with DBE/MBE/WBE Contracting Goals** - The Agency will monitor a Co-Developer Partner's plans and efforts for reaching eligible Disadvantaged Business Enterprises (DBE) Minority Business Enterprises (MBE) and Women Business Enterprises (WBE) goals and objectives. A Co-Developer Partner's strategy must be coordinated and integrated with The Agency's Compliance Department throughout the development process.
- 2.8 Full Disclosure.** The Agency requires full disclosure of who is involved in a proposed tax credit development. Following are the rules of disclosures for this category:
- 2.8.1** Agency requires complete disclosure of all entities and individuals in the Project team organizational structures.

## REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)

- 2.8.2 Agency may require complete disclosure of all real estate and commercial loans for the Project team through the submission of a complete and accurate real estate properties disclosure.
  - 2.8.3 Any relationship between individuals or entities of the Project team that could constitute a conflict of interest or identity of interest between the parties must be disclosed.
  - 2.8.4 Complete organizational charts must be submitted for the Owner and Developer entity that clearly show all principals down to individuals involved in the ownership and development of a Project. Please note that no change to the Project owner/developer structure can be made without the express consent of Agency.
  - 2.8.5 All Development fee sharing arrangements must be disclosed. Agency considers all individuals or entities that receive a portion of the Development fee to be part of the Development structure.
  - 2.8.6 All Guarantor agreements must be disclosed. Agency may determine that a Guarantor is actually a real party in interest to either the General Partner and/or Developer entities.
  - 2.8.7 All consulting agreements—direct or indirect, paid, or unpaid— shall be disclosed. Agency will review the amount of consulting fee to determine if a consultant is a real party in interest to either the General Partner and/or Developer entities.
  - 2.8.8 Any Project team member that has withdrawn or been involuntarily removed from a HOME or Tax Credit project in the last thirty-six months must disclose this information to Agency as part of its eligibility submission.
  - 2.8.9 All pending litigation.
  - 2.8.10 Significant non-performance in a government program must be disclosed.
  - 2.8.11 Any Project team member that has an adverse credit history including but not limited to a default in the payment of any commercial or personal loan must disclose that information.
  - 2.8.12 *Principal* shall generally be defined as an individual who has at least a direct ownership interest in the general partner or developer entity and who materially participates in the ownership, development and operation of the Project through regular, continuous and substantial involvement. For purposes of a non-profit entity, Agency will consider the executive director as a principal.
- 2.9 **Previous/Current Contractor(s).** The Agency has not recently retained a contractor for these services.



**REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)**

**3.0 PROPOSAL FORMAT.**

**3.1 Tabbed Proposal Submittal.** The Agency intends to retain the Co-Developer pursuant to a “Qualifications” basis, not a “Low Bid” basis (“Qualifications,” in that the Agency will, as detailed within the following Section 4.0, consider factors other than cost in making the award decision). Therefore, so that the Agency can properly evaluate the offers received, all proposals submitted in response to this RFQ must be formatted in accordance with the sequence noted within the table below. Each category must be separated by numbered index dividers (which number extends so that each tab can be located without opening the proposal) and labeled with the corresponding tab reference also noted below. None of the proposed services may conflict with any requirement the Agency has published herein or has issued by addendum.

[Table No. 4]

(1) RFQ Section	(2) Tab No.	(3) Description
3.1.1	1	<b>Form of Proposal.</b> This Form is attached hereto as Attachment A to this RFQ document. This 2-page Form must be fully completed, executed where provided thereon and submitted under this tab as a part of the proposal submittal.
3.1.2	2	<b>form HUD-5369-C (8/93), <i>Certifications and Representations of Offerors, Non-Construction Contract.</i></b> This Form is attached hereto as Attachment B to this RFQ document. This 2-page Form must be fully completed, executed where provided thereon and submitted under this tab as a part of the proposal submittal.
3.1.3	3	<b>Profile of Firm Form.</b> The Profile of Firm Form is attached hereto as Attachment C to this RFQ document. This 2-page Form must be fully completed, executed, and submitted under this tab as a part of the proposal submittal.
3.1.4	4	<b>Proposed Services.</b> The proposer shall place under this tab documentation further explaining the proposer’s services and showing how the proposer intends to fulfill the requirements of the preceding Section 2.0 herein, including, but not limited to:

**REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)**

**3.1.4.1**

As detailed within Section 4.1, Evaluation Factor No. 1, herein, Demonstrated Evidence of **ABILITY** to **PERFORM THE WORK**, including, but not limited to:

(a) Qualifications, experience, and expertise of each team member assigned to the Projects (principals and primary staff); and identify the individual who will serve as the Project Manager for the development team and who will direct and coordinate the development effort through completion. Describe the Project Manager’s prior and current experience with projects of similar anticipated scope and size;

(b) Current project load and capacity of team to effectively manage one or both Projects and provide a description of the development team’s prior experience working together.

**REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)**

**3.1.4.2**

As detailed within Section 4.1, Evaluation Factor No. 2, herein, Demonstrated Evidence of **PAST SUCCESSFUL EXPERIENCE** with mixed-income development and construction of projects of similar scope and size, including, but not limited to:

(a) Past or current affordable housing developments for a variety of income levels utilizing a variety of housing programs, grant sources (HUD, Choice Neighborhoods, etc.), funding sources such as RAD, LIHTC, HTC, and HUD financing;

(b) Experience in developing land and mixed-income housing units that utilized innovative and creative approaches;

(c) Prior mixed-finance development experience in the State of South Carolina evidenced by actual awards and supporting good standing letters of support from the agency including financing, constructing, leasing and managing

(d) Past performance in quality of work, cost control, and compliance with performance schedules and regulatory requirements; and

(e) Experience and Knowledge of the local housing market, regulations and codes, familiarity with federal and local affordable housing programs and the local agencies that administer these programs, including South Carolina Housing's Low Income Housing Tax Credits, Tax Exempt Bonds, and related state and city agencies

(f) Relevant Client Listing.

(g) The degree to which the team demonstrates successful experience with ownership and property management of mixed-finance senior rental developments of similar size, either directly or through supervision of property management

(h) Successful experience in the master planning and construction of mixed-finance development projects of comparable size and complexity, preferably low-income.

(i) Experience creating resident relocation plans and resident services plans

**REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)**

**3.1.4.3**

As detailed within Section 4.1, Evaluation Factor No. 3, herein, Degree to which the proposer illustrates the **OVERALL VISION** for the Projects, including, but not limited to:

(a) Evidence the proposer understands the Projects and the Agency’s goals, whether from experience with similar projects or from preparatory research;

(b) The proposer’s proposed project approach addresses project issues and indicates a good understanding of the Agency’s objectives, the local funding challenges, and resident protections along with description of the experience of the law firm and the key staff assigned to the Project(s) in structuring and negotiating market and affordable housing development; description of the experience of the architect and the key staff, including engineers, in addressing urban site planning issues. Such issues shall include: multi-family affordable and market-rate rental housing; creating affordable housing designs that appropriately balance concerns for quality of life, cost efficiency and optimizing land use; leading a design process that results in a high quality, sustainable design that strongly promotes green building and healthy housing strategies; designing and constructing cost effective units; and obtaining the permitting of similar projects in the City of Beaufort; description of the experience of the property management firm in managing urban low-income family rental housing as well as market housing

(c) Proven ability to work with stakeholders whose interests and redevelopment objective may differ.

(d) Evidence that the proposed team has experience in providing for meaningful resident and community participation throughout the planning and implementation of the development program, including the team’s experience with issues and obstacles related to meaningful resident and community participation.

**REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)**

3.1.4.4		<p>As detailed within Section 4.1, Evaluation Factor No. 4, herein, the proposer team’s Documented <b>ABILITY to OBTAIN FINANCIAL COMMITMENTS</b> from:</p> <p>(a) Federal, state, and local agencies, private investors, and banks including competitive LIHTC in South Carolina- submit evidence of actual awards and financial closing; and</p> <p>(b) A proven track record of creative and viable financial plans that do not rely principally on the Agency’s funds.</p> <p>(c) Proven ability to maximize private sector participation in the financing of complex residential projects.</p> <p>(d) BHA understands that the final development funding is fluid until closing. BHA requests evidence of deal structuring skills by a submission of a sample financial plan for a past project of comparable size and complexity that includes a complete development pro forma. The financial plan must include a statement of sources and uses and a 15year operating pro forma, breaking operating expenses into typical, separable categories. The pro forma must include the full developer fee, proposed asset management fees for all parties, the proposed ground lease rent, any split of cash flow and the priority of any cash flow contingent payments.</p>
3.1.4.5		Provide a detailed property management transition plan to allow the Agency to manage the Sites within 5 years of the development achieving stabilization.
3.1.4.6		Detail the approach to the division of work listed above and within the preceding Section 2.0 herein and the team members responsible for the same. Please provide an organizational chart.
3.1.4.7		Place hereunder full detail as to how the Firm, if chosen, will address any of the requirements detailed within the preceding Section 2.0 herein.
3.1.4.8		How will property management staff be retained, screened, trained, and monitored.
3.1.4.9		The proposed quality assurance program.
3.1.4.10		An explanation and samples of forms that will be used during both the development and property management phases and reports that will be submitted and the method of such reports (i.e., written; fax; internet; etc.).
3.1.4.11		A complete description of the products and services the Firm provide.

**REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)**

3.1.5	5	<b>Managerial Capacity/Financial Viability/Staffing Plan.</b> The proposer entity must submit under this tab a concise description of its managerial and financial capacity to deliver the proposed services for one or both Projects, including brief professional resumes for the persons identified within areas (5) and (6) of Attachment C, <i>Profile of Firm Form</i> . Such information shall include the proposer’s qualifications to provide the services; a description of the background and current organization of the Firm (including a current organizational chart). Please provide two years of financial statements.
3.1.6	6	<b>Client Information.</b> The proposer shall submit a listing of former or current clients, including Public Housing Authorities, for whom the proposer has performed similar or like services to those being proposed herein. The listing shall, at a minimum, include:
3.1.6.1		The client’s name;
3.1.6.2		The client’s contact name;
3.1.6.3		The client’s telephone number and e-mail address;
3.1.6.4		A brief narrative description and scope of the service(s) and the dates the services were/are provided.
3.1.7	7	<b>Equal Employment Opportunity/Supplier Diversity.</b> The proposer must submit under this tab a copy of its Equal Opportunity Employment Policy and a complete description of the positive steps it will take to ensure compliance, to the greatest extent feasible, with the regulations detailed within the following Section 3.6 herein pertaining to supplier diversity (i.e., small, minority-, and women-owned businesses).
3.1.8	8	<b>Subcontractor/Joint Venture Information (Optional Item).</b> The proposer shall identify hereunder whether or not he/she intends to use any subcontractors for this job, if awarded, and/or if the proposal is a joint venture with another firm. Please remember that all information required from the proposer under the proceeding tabs must also be included for any major subcontractors (10% or more) or from any joint venture.
3.1.9	9	<b>Design and Construction Concepts:</b> Proposers must submit sample architectural drawings of performed deals to provide comparative key design concepts, including assumptions about density and building typology. Proposers must demonstrate the capacity and experience of the team’s architect as it relates to one or both Projects.

**REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)**

<b>3.1.10</b>	<b>10</b>	<b>Financial Statements.</b> Attach the three most recent concurrent years of audited or certified public accountant prepared financial statements from each entity of the development team who will be providing any guarantees in connection with the development and operation of the Projects. The statements must include an Income Statement as well as a Balance Sheet showing assets, liabilities and net worth of the entity. Please also submit three bank references for the Developer. Financial statements and bank references may be placed in a separate sealed envelope. Provide a statement indicating how the Developer will honor all financial guarantees.
<b>3.1.11</b>	<b>11</b>	<b>Intentionally Blank</b>
<b>3.1.12</b>	<b>12</b>	<b>Intentionally Blank.</b>
<b>3.1.13</b>	<b>No Information Placed under a Tab.</b> If no information is to be placed under any of the above noted tabs (especially the "Optional" tabs), please place there under a statement such as "NO INFORMATION IS BEING PLACED UNDER THIS TAB" or "THIS TAB LEFT INTENTIONALLY BLANK." <u>DO NOT</u> eliminate any of the tabs.	
<b>3.1.14</b>	<b>Proposal Submittal Binding Method.</b> It is preferable and recommended that the proposer bind the proposal submittals in such a manner that the Agency can, if needed, remove the binding (i.e., "spiral-type" etc.) or remove the pages from the cover (i.e. 3-ring binder; etc.) to make copies, then conveniently return the proposal submittal to its original condition.	

**3.2 No Fees Proposed.** No fees shall be discussed or proposed, either verbally or in writing, during the RFQ competitive solicitation process. The Agency will, as detailed within the following Sections 4.0 and 5.0 herein, negotiate such fees with the top-rated proposer(s). The Agency does not guarantee any minimum or maximum amount of work as a result of any award(s) ensuing from this RFQ and will reserve the right to award any amount of work on an as-needed basis.

**3.2.1 No Deposit/No Retainer.** The Agency will NOT pay any deposits or retainer fees as a result of award of the ensuing contract. This means that the Agency will pay the Successful Proposer(s) for actual work performed only.

**3.3 Proposal Submission.** All required submissions must be entered, where provided for within the Marketplace and all "hard-copy" proposals must be submitted and time-stamped received in the designated Agency office by no later than the submittal deadline stated herein (or within any ensuing addendum). A total of 1 original signature copy (marked "ORIGINAL") and 2 exact copies (each of the 3 separate proposal submittals shall have a cover and extending tabs) of the "hard copy" proposal submittal, shall be placed unfolded in a sealed package and addressed to:

**Housing Authority of the City of Beaufort  
Attention: Julie Davis  
1009 Prince Street  
Beaufort SC 29902**

## REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)

- 3.3.1 Labeling Proposal Package.** The package exterior must clearly denote the above noted RFQ number and must have the proposer’s name and return address. Proposals received after the published deadline will not be accepted.
- 3.3.2 Submission Conditions. DO NOT FOLD OR MAKE ANY ADDITIONAL MARKS, NOTATIONS, OR REQUIREMENTS ON THE DOCUMENTS TO BE SUBMITTED!** Proposers are not allowed to change any requirements or forms contained herein, either by making or entering onto these documents or the documents submitted any revisions or additions; and if any such additional marks, notations or requirements are entered on any of the documents that are submitted to the Agency by the proposer, such may invalidate that proposal. If, after accepting such a proposal, the Agency decides that any such entry has not changed the intent of the proposal that the Agency intended to receive, the Agency may accept the proposal and the proposal shall be considered by the Agency as if those additional marks, notations, or requirements were not entered on such. By downloading these documents, each prospective proposer that does so is thereby agreeing to confirm all notices that the Agency delivers to him/her as instructed, and by submitting a proposal, the proposer is thereby agreeing to abide by all terms and conditions published herein and by addendum pertaining to this RFQ.
- 3.3.3 Submission Responsibilities.** It shall be the responsibility of each proposer to be aware of and to abide by all dates, times, conditions, requirements, and specifications set forth within all applicable documents issued by the Agency, including the RFQ document, the documents listed within the following Section 3.7 herein, and any addenda and required attachments submitted by the proposer. By virtue of completing, signing, and submitting the completed documents, the proposer is stating his/her agreement to comply with all conditions and requirements set forth within those documents. Written notice from the proposer not authorized in writing by the ED to exclude any of the Agency requirements contained within the documents may cause that proposer to not be considered for award.
- 3.4 Proposer’s Responsibilities – Contact with the Agency.** It is the responsibility of the proposer to address all communication and correspondence pertaining to this RFQ process to the CEO only. Proposers must not make inquiry or communicate with any other Agency staff member or official (including members of the Board of Commissioners) pertaining to this RFQ. Failure to abide by this requirement may be cause for the Agency to not consider a proposal submittal received from any proposer who may not have abided by this directive.
- 3.4.1 Addenda.** All questions and requests for information must be addressed in writing to the CEO. The CEO will respond to all such inquiries in writing by addendum to all prospective proposers (i.e., firms or individuals that have obtained the RFQ Documents). During the RFQ solicitation process, the CEO will NOT conduct any *ex parte* (a substantive conversation—“substantive” meaning, when decisions pertaining to the RFQ are made—between the



## REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)

Agency and a prospective proposer when other prospective proposers are not present) conversations that may give one prospective proposer an advantage over other prospective proposers. This does not mean that prospective proposers may not contact the CEO—it simply means that other than making replies to direct the prospective proposer where his/her answer has already been issued within the solicitation documents, the CEO may not respond to the prospective proposer's inquiries but will direct him/her to submit such inquiry in writing so that the CEO may more fairly respond to all prospective proposers in writing by addendum.

### **3.5 Proposer's Responsibilities – Equal Employment Opportunity and Supplier Diversity.** Both the Successful Proposer and the Agency have, pursuant to HUD regulation, certain responsibilities pertaining to the hiring and retention of personnel and subcontractors.

#### **3.5.1** Within 2 CFR §200.321 it states:

**3.5.1.1** Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms.

**3.5.1.2 (a)** The non-federal entity must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

**3.5.1.3 (2)** Affirmative steps must include:

**3.5.1.3.1 (1)** Placing qualified small and minority businesses and women's business enterprises on solicitation lists;

**3.5.1.3.2 (2)** Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;

**3.5.1.3.3 (3)** Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority business, and women's business enterprises;

**3.5.1.3.4 (4)** Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority business, and women's business enterprises;

**3.5.1.3.5 (5)** Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and

**REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)**

**3.5.1.3.6** (6) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (1) through (5) of this section.

**3.5.2** Within HUD Procurement Handbook 7460.8 REV 2 it states:

**3.5.2.1 Section 15.5.A, Required Efforts.** Consistent with Presidential Orders 11625, 12138, and 12432, the [Agency] shall make every effort to ensure that small businesses, MBEs, WBEs, and labor surplus area businesses participate in [Agency] contracting.

**3.5.2.2 Section 15.5.B, Goals.** [The Agency] is encouraged to establish goals by which they can measure the effectiveness of their efforts in implementing programs in support of . . . contracting with disadvantaged firms. It is important to ensure that the means used to establish these goals do not have the effect of limiting competition and should not be used as mandatory set-aside or quota, except as may otherwise be expressly authorized in regulation or statute. Some localities have adopted minority contracting set-aside policies or geographic limitations, which may be in conflict with Federal requirements for full and open competition.

**3.5.3** Within our **Agency Procurement Policy** it states that our Agency will:

**3.5.3.1 Assistance to Small and Other Business, Required Efforts:**

**3.5.3.1.1** Including such firms, when qualified, on solicitation mailing lists;

**3.5.3.1.2** Encouraging their participation through direct solicitation of proposals or proposals whenever they are potential sources;

**3.5.3.1.3** Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by such firms;

**3.5.3.1.4** Establishing delivery schedules, where the requirement permits, which encourage participation by such firms;

**3.5.3.1.5** Using the services and assistance of the Small Business Administration, and the Minority Business Development Agency of the Department of Commerce;

**REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)**

**3.5.3.1.6** Requiring prime contractors, when subcontracting is anticipated, to take the positive steps listed above.

**3.5.4 Requirements.** Accordingly, please see Section 3.1.7 within Table No. 4 herein which details the information pertaining to this issue that the proposer must submit in response to this proposal showing compliance, to the greatest extent feasible, with these regulations.

**3.6 Pre-proposal Conference.** A Virtual Q&A Session (non-mandatory) will be held on Friday, January 24, 2025 at 11:00AM, TIME EST. (Virtually Q&A Session link will be posted to the PHA Website: <https://www.beaufortha.com/bids-rfps-rfqs>).

**3.7 Recap of Attachments.** It is the responsibility of each proposer to verify that he/she has downloaded the following attachments pertaining to this RFQ, which are hereby by reference included as a part of this RFQ:

[Table No. 5]

(1) RFQ Section	(2) Document No.	(3) Attachment	(4) Attachment Description
3.7.1	1.0		This RFQ Document
3.7.2	2.0	A	Form of Proposal
3.7.3	3.0	B	form HUD-5369-C (8/93), <i>Certifications and Representations of Offerors, Non-Construction Contract</i>
3.7.4	4.0	C	Profile of Firm Form
3.7.5	5.0	D	Section 3 Explanation
3.7.6	6.0	E	form HUD-5369-B (8/93), <i>Instructions to Offerors, Non-Construction</i>

**REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)**

**4.0 PROPOSAL EVALUATION.**

**4.1 Evaluation Factors.** The following factors will be utilized by the Agency to evaluate each proposal submittal received; award of points for each listed factor will be based upon the documentation that the proposer submits within his/her proposal submittal :

[Table No. 6]

(1) No.	(2) Max Point Value	(3) Factor Type	(4) Factor Description
1	20 points	Subjective (Technical)	<p>Demonstrated Evidence of <b>ABILITY to PERFORM THE WORK</b>, including, but not limited to:</p> <p>(a) Qualifications, experience, and expertise of each team member (member firm) assigned to the Projects (principals and primary staff); and</p> <p>(b) Current project load and capacity of team to effectively manage one or both Projects.</p> <p>(c) Cohesion of the team, as demonstrated by previous experience working together.</p>
2	35 points	Subjective (Technical)	<p>Demonstrated Evidence of <b>PAST SUCCESSFUL EXPERIENCE</b> in the last 5 years with mixed-income mixed-finance development and construction of projects of similar scope and size, including, but not limited to:</p> <p>(a) Past or current affordable housing developments for a variety of income levels utilizing a variety of housing programs, grant sources (HUD, Choice Neighborhoods, etc.), funding sources such as RAD, LIHTC, HTC, ad HUD financing;</p> <p>(b) Experience in developing land and mixed-income housing units that utilized innovative and creative approaches;</p> <p>(c) Prior mixed-finance development experience in the State of South Carolina evidenced by actual awards and supporting good standing letters of support from the agency including financing, constructing, leasing and managing; and</p> <p>(d) Past performance in quality of work, cost control, and compliance with performance schedules and regulatory requirements; and</p> <p>(e) Experience and Knowledge of the local housing market, regulations and codes, familiarity with federal and local affordable housing programs and the local agencies that administer these programs, including South Carolina</p>

**REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)**

			<p>Housing’s Low Income Housing Tax Credits, Tax Exempt Bonds, and related state and city agencies</p> <p>(f) Relevant Client Listing.</p> <p>(g) The degree to which the team demonstrates successful experience with ownership and property management of mixed-finance senior rental developments of similar size, either directly or through supervision of property management</p> <p>(h) Successful experience in the master planning and construction of mixed-finance development projects of comparable size and complexity, preferably low-income including a schedule of real estate to demonstrate success.</p>
<b>3</b>	<b>15 points</b>	<b>Subjective (Technical)</b>	<p>Degree to which the proposer illustrates the <b>OVERALL VISION</b> for the Projects, including, but not limited to:</p> <p>(a) Evidence the proposer understands the Projects and the Agency’s goals, whether from experience with similar projects or from preparatory research;</p> <p>(b) The proposer’s proposed project approach addresses the project issues and indicates a good understanding of the Agency’s objectives, the local funding challenges, and community involvement;</p> <p>(c) Evidence that the proposed team has experience in providing for meaningful resident and community participation throughout the planning and implementation of the development program, including the team’s experience with issues and obstacles related to meaningful resident and community participation.</p>
<b>4</b>	<b>25 points</b>	<b>Subjective (Technical)</b>	<p>The proposer team’s Documented <b>ABILITY to OBTAIN FINANCIAL COMMITMENTS</b> (in the form of actual awards to projects and evidence of financial closing) from:</p> <p>(a) Federal, state, and local agencies, private investors, and banks including competitive LIHTC in South Carolina; and</p> <p>(b) A proven track record of creative and viable financial plans that do not rely principally on the Agency’s funds.</p> <p>(c) Proven ability to maximize private sector participation in the financing of complex residential projects.</p> <p>(d) The advantage of the Business Terms proposed.</p>

**REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)**

5	5 points	Subjective (Technical)	The <b>OVERALL QUALITY, ORGANIZATION, and PROFESSIONAL APPEARANCE</b> of the <b>PROPOSAL SUBMITTED</b> , based upon the opinion of the evaluators.
	100 points		Total Points
*Tie Breaker Evaluation criteria: Distance in miles calculated using Google Maps between the proposer’s address provided in this RFQ and Sandalwood Terrace or Marsh Pointe, whichever is shorter.			

**4.2 Evaluation Method.** The eventual award will occur based on the following detailed brief procedures.

**4.2.1 Initial Evaluation for Responsiveness.** Each proposal received will first be evaluated for responsiveness and responsibility (i.e. meets the minimum of the requirements). NOTE: Please reference Section 3.1 herein.

**4.2.2 Evaluation Packet.** An evaluation packet will be prepared for each evaluator, including the following documents:

**4.2.2.1** Instructions to Evaluators;

**4.2.2.2** Proposal Tabulation Form;

**4.2.2.3** Written Narrative Form for each proposer;

**4.2.2.4** Statement of each proposer’s responsiveness and responsibility;

**4.2.2.5** Copy of all pertinent RFQ documents.

**4.2.3 Evaluation Committee.** The Agency will select a minimum of a three-person committee to evaluate each of the responsive proposals submitted in response to this RFQ. PLEASE NOTE: No proposer shall be informed at any time during or after the RFQ process as to the identity of any evaluation committee member. If, by chance, a proposer does become aware of the identity of such person(s), he/she SHALL NOT make any attempt to contact or discuss with such person anything related to this RFQ. As detailed within Section 3.4 of this document, the designated CO is the only person at the Agency that the proposers shall contact pertaining to this RFQ. Failure to abide by this requirement may (and most likely will) cause such proposer(s) to be eliminated from consideration for award.

**4.2.4 Evaluation.** The appointed evaluation committee, inclusive of the CO but independent of any other person at the Agency and its board of commissioners, shall evaluate the responsive proposals submitted and award points pertaining to Evaluation Factors No. 1 through No. 5 (the “Subjective” Factors). Upon final completion of the proposal evaluation process, the evaluation committee will forward the completed evaluations to the CO. If in the case of a tie, the CO will evaluate and make a determination based on Tie Breaker Evaluation Criteria. See bottom of Evaluation Factors chart.

**REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)**

**4.2.4.1 Points Awarded Range.** Pertaining to the Subjective Factors, please note the following range of points awarded (points pertaining to this RFQ are shaded—please also see the Evaluation Factors detailed within the preceding Section 4.1):

[Table No. 7]

Points Awarded Range								
Classification*	Rating	%	5	15	20	25	35	100
Acceptable	Excellent	95%/+	4-5	14-15	19-20	24-25	34-35	95-100
Acceptable	Very Good	90%/+	4-5	14-15	17-18	22-23	33	90-94
Potentially Acceptable	Good	80%/+	3	12-14	14-17	20-22	31-33	80-89
Potentially Acceptable	Average	70%/+	2	10-12	12-14	18-20	28-31	70-79
Unacceptable	Poor	<70%	1	0-10	0-12	0-18	0-28	0-69
*Pursuant to Section 7.2.N.3 of HUD Procurement Handbook 7460.8 REV 2.								

**4.2.5 Interviews.** All proposers that score Acceptable-Excellent or Acceptable-Very Good will be invited to interview with the Agency. The Agency reserves the right to invite proposers that score below Acceptable-Very Good. Interviews are for clarification of documents submitted by a proposer, and not separately scored.

**4.2.6 Determination of Top-ranked Proposer.** The points awarded by the evaluation committee will be used to determine the final rankings. Upon the ED confirming the evaluation is compliant with the terms of this solicitation, the final rankings may be forwarded to the Housing Authority Board of Commissioners (BOC) at a scheduled meeting for approval. Contract negotiations may, at the Agency's option, be conducted prior to or after the BOC approval.

**4.2.6.1 Minimum Evaluation Results.** To be considered to receive an award a proposer must receive a total calculated average of at least 70 points (of the 100 total possible points detailed within Section 4.1 herein).

**4.2.6.2 Ties.** In the case of a tie in points awarded, the award shall be decided as provided in Section 4.1.

**4.2.7 Notice of Results of Evaluation.** If an award is completed, all proposers will receive by e-mail a Notice of Results of Evaluation. Such notice shall inform all proposers of:

**4.2.7.1** Which proposer received the award;

REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)

4.2.7.2 Where each proposer placed in the process as a result of the evaluation of the proposals received;

4.2.7.3 Each proposer's right to a debriefing and to protest.

4.2.8 **Restrictions.** All persons having familial (including in-laws) and/or employment relationships (past or current) with principals and/or employees of a proposer entity will be excluded from participation on the Agency evaluation committee. Similarly, all persons having ownership interest in and/or contract with a proposer entity will be excluded from participation on the Agency evaluation committee.



**5.0 CONTRACT AWARD.**

**5.1 Contract Award Procedure.** If a contract is awarded pursuant to this RFQ, the following detailed procedures will be followed:

**5.1.1** By completing, executing and submitting a proposal, the “proposer is thereby agreeing to abide by all terms and conditions pertaining to this RFQ as issued by the Agency, either in hard copy or on the Marketplace” including the contract clauses already attached as Attachments G and G-1 through G-3, each attached hereto. Accordingly, the Agency has no responsibility to conduct after the submittal deadline any negotiations pertaining to the contract clauses already published.

**5.1.2** By responding to this solicitation, the proposer acknowledges that the Agency may award contracts to multiple Co-Development Partners. By responding to this solicitation, the proposer further acknowledges that if the Agency awards contracts to multiple Co-Development Partners, then the Agency retains the right to choose, in its discretion, without competition, which Sites, if any, shall be offered to a Co-Development Partner. The Agency shall use submitted qualifications of a Co-Development Partner, Site-specific considerations, and the interests of the Agency to choose which Co-Development Partner is offered a Site, if any. If the Agency offers a Site to a Co-Development Partner, the Agency and Co-Development Partner shall negotiate all business terms and use best efforts to contract for development of the Site. If after negotiating in good faith the Agency and Co-Development Partner do not reach agreement within a reasonable period of time, then the Agency may, but is not obligated to, offer the Site to another awarded Co-Development Partner.

**5.2 Contract Conditions.** The following provisions are considered mandatory conditions of any contract award made by the Agency pursuant to this RFQ:

**5.2.1 Contract Form.** The Agency will not execute a contract on a Co-Development Partner’s form—contracts will only be executed on the Agency form (please see Sample Contract, Attachments G and G-1 through G-3, each attached hereto), and by submitting a proposal the Co-Development Partner agrees to do so (please note that the Agency reserves the right to amend this form as the Agency deems necessary). However, the Agency will during the RFQ process (prior to the posted question deadline) consider any contract clauses that the proposer wishes to include therein and submits in writing a request for the Agency to do so; but the failure of the Agency to include such clauses does not give the Co-Development Partner the right to refuse to execute the Agency’s contract form. It is the responsibility of each prospective proposer to notify the Agency, in writing, prior to the posted question deadline, of any contract clause that he/she is not willing to include in the final executed contract and abide by. The Agency will consider and respond to such written correspondence, and if the prospective proposer is not willing to abide by the Agency’s response (decision), then that prospective proposer shall be deemed ineligible to submit a proposal.

## REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)

- 5.2.1.1 Mandatory HUD Forms.** Please note that the Agency has no legal right or ability to (and will not) at any time negotiate any clauses contained within ANY of the HUD forms included as a part of this RFQ. In that regard, all mandatory HUD provisions are requirements of the contract.
- 5.2.2 Assignment of Personnel.** The Agency shall retain the right to demand and receive a change in personnel assigned to the work if the Agency believes that such change is in the best interest of the Agency and the completion of the contracted work.
- 5.2.3 Unauthorized Sub-contracting Prohibited.** The Co-Development Partner shall not assign any right, nor delegate any duty for the work proposed pursuant to this RFQ (including, but not limited to, selling or transferring the contract) without the prior written consent of the ED. Any purported assignment of interest or delegation of duty, without the prior written consent of the ED shall be void and may result in the cancellation of the contract with the Agency, or may result in the full or partial forfeiture of funds paid to the Co-Development Partner as a result of the proposed contract; either as determined by the ED.
- 5.3 Contract Period.** The Agency anticipates that it will initially award a contract for the period of 2 years with the option, at the Agency's discretion, of 3 additional one-year option periods, for a total maximum contract period of 5 years.
- 5.4 Licensing and Insurance Requirements.** Prior to award (but not as a part of the proposal submission) the Successful Proposer will be required to provide:
- 5.4.1 Workers Compensation Insurance.** An original certificate evidencing the Successful Proposer's current industrial (worker's compensation) insurance carrier and coverage amount (NOTE: Workers Compensation Insurance will be required of any Successful Proposer that has employees other than just the owner working on-site to provide the services);
- 5.4.2 General Liability Insurance.** An original certificate evidencing General Liability coverage, naming the Agency as an additional insured, together with the appropriate endorsement to said policy reflecting the addition of the Agency as an additional insured under said policy (minimum of \$1,000,000 each occurrence, general aggregate minimum limit of \$1,000,000, together with damage to premises and fire damage of \$50,000 and medical expenses any one person of \$5,000), with a commercially reasonable deductible (i.e., "commercially reasonable," meaning not greater than 1% of the "general aggregate minimum" of the policy, with a maximum deductible amount of \$50,000);
- 5.4.3 Professional Liability Insurance.** An original certificate showing the Successful Proposer's professional liability and/or "errors and omissions" coverage (minimum of \$1,000,000 each occurrence, general aggregate

**REQUEST FOR QUALIFICATIONS RFQ Co-Developer Partner(s)**

minimum limit of \$1,000,000), with a commercially reasonable deductible (i.e., “commercially reasonable,” meaning not greater than 1% of the “general aggregate minimum” of the policy, with a maximum deductible amount of \$50,000);

**5.4.4 Automobile Insurance.** An original certificate showing the Successful Proposer’s automobile insurance coverage in a combined single limit of \$1,000,000. For every vehicle utilized during the term of this program, when not owned by the entity, each vehicle must have evidence of automobile insurance coverage with limits of no less than \$50,000/\$100,000 and medical pay of \$5,000.

**5.4.5 City/County/State Business License.** If applicable, a copy of the Successful Proposer’s business license allowing that entity to provide such services within the City of Beaufort and/or the State of South Carolina.

**5.4.6 Profile of Firm Form.** The requested related information shall also be entered where provided for on the Profile of Firm Form (DO NOT ATTACH SUBMIT COPIES WITHIN THE PROPOSAL SUBMITTAL—we will garner the necessary certificates from the Co-Development Partner prior to contract execution).

**5.5 Contract Service Standards.** All work performed pursuant to this RFQ must conform and comply with all applicable local, state, and federal codes, statutes, laws, and regulations.

**5.6 Prompt Return of Contract Documents.** Any and all documents required to complete the contract, including contract signature by the successful proposers, shall be provided to the Agency within 10 workdays of notification by the Agency.

## Index of Tables

[Table No. 8]

Table	Description	Page
1	Table of Contents	2
2	RFQ Information at a Glance	5
3	Potential Development Locations- OMITTED - SEE INTRODUCTION SECTION FOR INFORMATION	7
4	Tabbed Proposal Submittal	17
5	Recap of Attachments	27
6	Evaluation Factors	28
7	Points Awarded Range	31
8	Index of Tables	35