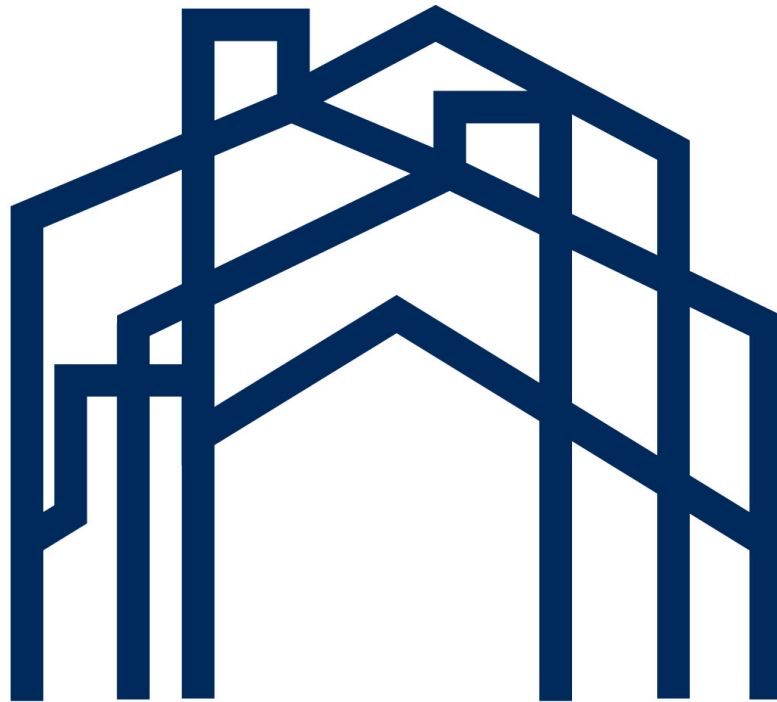


REQUEST FOR PROPOSALS
(SOLICITATION NO. 2019-05)
Affordable Housing Development
Consultant Services (AHDCS)
Posted 02-04-19

Everett Housing



Housing Everett

TABLE OF CONTENTS

Title	Section	Page
1	Introduction	3
2	HA's Reservation of Rights	3
3	Questions	4
4	Scope of Services	4
5	Submittal Layout	6
6	Evaluation Criteria	7
7	Email Submission Requirements	8
8	Selection Process	8
9	Contract Negotiations	9
<p>Universal Documents Fillable forms to complete Tab 6 can be found on our website at www.evha.org</p> <ul style="list-style-type: none"> • Doing Business with EHA <ul style="list-style-type: none"> • Universal Bid Documents 		
Informational	HUD 5369-Instructions to Bidders	
Informational	HUD 5370-General Conditions for Non-Construction Contracts	
Informational	Insurance Requirements	
Tab 6	EHA Vendor Information Sheet;	
Tab 6	Section 3 Form-Vendor Preference	
Tab 6	W-9 Form	
Tab 6	OMWBE Report	
Tab 6	Non-Collusive Affidavit	
Tab 6	HUD 5369 A-Representations, Certifications and other Statement of Bidders	

The EVERETT HOUSING AUTHORITY is soliciting proposals professional services for “Affordable Housing Development Consultant Services” (AHDCS)

Firms interested in providing such service to the Everett Housing Authority (HA) must complete and submit a statement that substantiates or presents evidence of that firm's abilities and expertise in the areas defined in the selection criteria section of this document.

Schedule: (subject to change)

Request for Proposal Available	02-04-19	
Questions Due	02-13-19	12 PM PST
Addendum(s) Issued	02-18-19	5 PM PST
Submittal Due	02-25-19	5 PM PST
Team Evaluation Period	02-16-19 thru 03-08-19	
Team Meeting	Week of March 11, 2019	
Interview (If applicable)	Week of March 18, 2019	

1. INTRODUCTION

The Everett Housing Authority (EHA) is requesting proposals from professional consulting firms to provide financial advisory and support services associated with the development and preservation of low income and affordable housing in the Everett area. The Everett Housing Authority was created in 1942 as a public body corporate and politic to provide safe, decent, and sanitary housing for low and moderate income residents of the City of Everett. The Authority derives its power from the Washington State Law, RCW 35.82. EHA is governed by a six member Board of Commissioners, appointed by the Mayor of the City of Everett for five year terms, subject to approval by the City Council. The Board sets policy of the Authority and hires the Executive Director who directs the daily operations of the Authority.

EHA provides housing assistance through a variety of programs, including HUD's Housing Choice Voucher and Low Income Public Housing programs, affordable housing properties, senior affordable housing properties, and tax credit properties. The Authority is actively engaged in repositioning its inventory, acquiring additional properties, and considering investments to meet the affordable housing needs in Everett and Snohomish County. These efforts include:

- Conversion of 9 – HUD Multifamily Project Rental Assistance Contract (PRAC) properties to either project-based voucher (PBV) assistance or Project Based Rental Assistance (PBRA) under HUD's Rental Assistance Demonstration (RAD) program financed with tax credits and bonds for the renovations of these properties.
- Acquisition, resyndication and rehabilitation of upto four senior/elderly housing properties that are individually funded with either FHA 223f, LIHTC, HOME, Housing Trust Fund with subsidies from PBRA and PBV.
- Over the next several years EHA intends to re-syndicate its existing properties, develop and/or acquire additional units through a variety of financing methods including tax credits, bond financing, and conventional loans.

The scope of work required of the consultant will include assistance with some or all of these efforts.

2. HA'S RESERVATION OF RIGHTS

The HA reserves the right to reject any or all proposals, to waive any informality in the RFP process, or to terminate the RFP process at any time, if deemed by the HA to be in its best interests.

- 1.2** The HA reserves the right not to award a contract pursuant to this RFP.
- 1.3** The HA reserves the right to terminate a contract awarded pursuant to this RFP, at any time for its convenience upon 30 days written notice to the successful proposer(s).
- 1.4** The HA reserves the right to determine the days, hours and locations that the successful proposer(s) shall provide the services called for in this RFP.
- 1.5** The HA reserves the right to 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 HA Contracting Officer (CO).
- 1.6** The HA reserves the right to negotiate the fees proposed by the proposer entity.
- 1.7** The HA reserves the right to reject and not consider any proposal that does not meet the requirements of this RFP, including but not necessarily limited to incomplete proposals and/or proposals offering alternate or non-requested services.
- 1.8** The HA shall have no obligation to compensate any proposer for any costs incurred in responding to this RFP.

- 1.9 The HA shall reserve the right at any time during the RFP 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 the HA's website and by downloading this document, each prospective proposer is thereby agreeing to abide by all terms and 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 HA that he/she feels needs to be addressed. Failure to abide by this time frame shall relieve the HA, but not the prospective proposer, of any responsibility pertaining to such issue.
- 1.10 The HA will reject the proposal of any Offeror who is debarred by the U.S. Department of Housing and Urban Development (HUD) from providing services to public housing agencies and reserves the right to reject the proposal of any Offeror who has previously failed to perform any contract properly for the HA.
- 1.11 The HA reserves the right to schedule interviews with two or more of the highest scoring firms. Firms that are interviewed will receive additional points based upon the outcome of their interview. The HA will select the firm with the highest amount of total points.
- 1.12 The HA and the selected firm will negotiate the terms and conditions of the professional services contract. The HA reserves the right to modify the scope of work and expand or modify the terms and conditions specifically set forth in this RFP. In the event the HA and the selected firm are not able to reach agreement on contract terms and conditions acceptable to both parties, the HA reserves the right, at its sole discretion, to enter into negotiations with the next highest -rated firm(s) and will be relieved of any obligation to negotiate with or contract for services from the selected firm(s).
- 1.13 The HA reserves the right to initially award a contract for the period of one (1) year with the option, at the HA's discretion, of four (4) additional one-year option periods.
- 1.14 There are documents listed on the Table Of Contents under Universal Documents which are hereby referenced and hereby made a part of this Request for Proposal whether attached or not.

3. QUESTIONS

Due Date for Questions: Questions regarding matters related to this RFP or requests for further information must be submitted in writing **no later than 12:00 p.m. (noon) on February 13, 2019** to submittals@evha.org.

Questions will be addressed by addendum no later than February 18, 2019, which will be published on EHA's website at <http://www.evha.org>

It is the responsibility of proposers to check this website prior to submission of a proposal to review and download any addenda issued. Proposer shall also make note on their cover letter that they acknowledge any addendum posted.

4. SCOPE OF SERVICES

Reporting to the Executive Director or designee, the consulting firm will provide analytical and advisory services that will support the senior staff including the Finance Director and the Director of Development and/or the Director of Acquisitions in making development decisions. In addition, the consulting firm will assist the senior staff with completing development tasks as needed.

The following initiatives and related tasks are illustrative of, but not limited to the types of work the selected consultant firm may be asked to perform:

1. RAD conversion of Section 202 Projects:
 - Assist EHA in preparing an application to HUD to convert 369 units comprising of 9 – Section 202 PRAC projects to Project Based Rental Assistance or Project Based Vouchers.
 - Direct HUD’s approval process including development and ongoing over site of due diligence task and document schedule.
 - Analyze financial sustainability of properties receiving RAD voucher funding and make appropriate recommendations to EHA.
 - Develop appropriate reports and analysis.
 - Procure third party which may include but not limited to contractors and appraisers.
 - Assist with the Physical Capital Needs Assessment processes if necessary.

2. Acquisition of new properties and re-syndication of currently owned properties:
 - Assist in identifying new properties for acquisition.
 - Evaluate currently owned properties for opportunities to re-syndicate or redevelop.
 - Based on the feasibility analyses and EHA criteria, evaluate and recommend debt options, including, but not limited to, public funding, private debt, loans, bonds, etc.
 - Evaluate and recommend equity options, including various tax credit programs, for example, 4% and/or 9% Low Income Housing Tax Credits, New Markets Tax Credits, Historical/Renovation Tax Credits.
 - Create comprehensive development budgets, operating pro-formas, and other reports and analyses for EHA’s and potential lender’, investors’, and other funders’ consideration.
 - Conduct competitive procurement processes for other consultants as well as investors and lenders.
 - Identify other members of the development team.
 - Analyze financial markets and economic conditions to recommend timing of real estate investments and transactions.
 - Develop proposals and recommendations for and applications for a range of bridge/construction financing and permanent financing.
 - Develop tax credit applications.

3. Professional financial and development consulting:
 - Analyze EHA’s current tax credit projects and develop exit strategy plans.
 - Provide training and information to senior staff and Board of Commissioners as needed.
 - Provide information on current developments that affect affordable housing and recommendations pertinent to EHA.
 - Assist senior staff as necessary in evaluating processes related to conversions, tax credit projects, and acquisition activities, for example, creating and monitoring lease up schedules.
 - Provide ongoing consultation and support as needed in relation to EHA’s development initiatives.

All requests for services to be performed under the scope of this RFP and resulting Contract will be made by written Work Orders, signed and executed in agreement by both parties prior to the commencement of any billable activity. When services are required, the selected consultant shall prepare and negotiate with EHA a specifically defined scope of work, the required outcome or deliverables, specifically assigned personnel, a schedule and a not-to-exceed fee proposal based on

hourly rates contained in their response to this RFP. Presuming satisfactory work on any assigned tasks and continuation of any key personnel, EHA expects the contract with the selected consultant would be renewed annually for up to five (5) years. There is, however, no guarantee of the level of effort that may be requested or guarantee of any dollar amount for the contract in any one year or over its course.

EHA reserves the right to waive any irregularities in the submission package and process.

Companies interested in submitting a response to this RFP/Q should develop a submittal that best illustrates their expertise in the areas identified in the selection criteria.

5. SUBMITTAL LAYOUT

Proposals should be limited to a total of 20 pages (The cover letter and EHA required attachments are not included in the page limitation).

Proposers are responsible for checking EHA's website at <http://www.evha.org> prior to submission of a proposal to review and download any addenda issued.

Response / Proposal Content: To facilitate evaluation, proposals should address and be organized in the order of the outline given below and include the following information:

Include a cover letter stating why you believe your firm or your firm plus sub-consultants is uniquely qualified to perform the breadth of potential services. A principal or officer of the firm authorized to execute contracts or other similar documents on the firm's behalf must sign the letter. The cover letter should address acknowledgement of an addendum issued.

Address each of the evaluation criteria noted below.

Tab 1: RAD conversion of Public Housing and/or HUD Multifamily Projects: Relate your firm's or your sub-consultants' experience with Rental Assistance Demonstration (RAD) conversions, or similar conversions. Describe the various tasks associated with RAD conversions and the approach that your firm would use in assisting EHA in a successful RAD conversion of our PRAC Projects.

Tab 2: Acquisition of new properties and re-syndication of currently owned properties: Relate your firm's and any sub-consultants' experience with similar projects including your experience with the delivery and implementation of Low Income Housing Tax Credit (LIHTC) program, Housing Trust Fund and other local funding. Describe various financial packages that your firm has developed which use LIHTC's in conjunction with other financing to acquire or preserve affordable housing. Please list specific projects that your firm served as the consultant on, highlighting both the financial and development results of those projects.

Tab 3: Professional financial and development consulting: Relate your firm's and any sub-consultants' experience with financial and development consulting including the analysis of Low Income Housing Tax Credit (LIHTC) partnerships that are approaching their 15th year and projecting their ending financial position at the 15th year to recommend actions to mitigate or minimize financial liability to general and managing partnerships. Describe your experience providing ongoing support to agencies that have used your services and your experience reporting information to Boards, and/or agency executive staff. Please include information on your firm's ability to stay current on affordable housing developments.

Tab 4: Provide resumes for the key personnel named in your response to Evaluation Criteria. Also include a list of at least three references for whom the firm or team members have performed similar work in the last five years (including agency or business name of client, contact person, address, telephone number and e-mail address if available.)

Tab 5: Relating to Criterion Above: List the titles/classifications and all-inclusive hourly rates for each team member shown in your response to Criterion listed above, including any sub-consultant team members, if applicable. Also indicate any rate discount that you may offer to EHA for this work. Please provide detail of any proposed rate increases for potential annual renewals for years 2-5. In submitting a proposal, the Consultant and any sub-consultants agree that hourly rates identified for each person on the team shall be applicable for the entire year of 2019.

Tab 6: EHA Required Forms:

Fillable forms can be found on our website at www.evha.org

- **Doing Business with EHA**
 - **Universal Documents**

6. EVALUATION CRITERIA

Consultants’ submittals will be evaluated based on the criteria listed in this section and further described in Section C above. In preparing the submittal to EHA, it is important for proposers to clearly demonstrate their expertise in the areas described in this document. Because multiple areas of expertise are required for successfully performing this project, the consultant, either through in-house staff or sub-consultants, must demonstrate expertise and have available adequate numbers of experienced personnel in all of the areas described.

Consultants are encouraged to identify and clearly label in their submittal how each criterion is being fully addressed. Evaluation of responses to this RFP will be based only on the information provided in the submittal package, and if applicable, interviews, and reference responses. EHA reserves the right to request additional information or documentation from the firm regarding its submittal documents, personnel, financial viability, or other items in order to complete the selection process. If a responding firm chooses to provide additional materials in their proposal beyond those requested, those materials should be identified as such and included in a separate section of the proposal.

The following criteria will be utilized to evaluate the qualifications of each proposer. There is a total of 30 points available.

- Each tabbed section described in Section 5 will use the following scoring matrix:
 - **1-does not meet expectations of the criteria**
 - **3-meets basic expectations of the criteria**
 - **5-exceeds the expectations of the criteria**

Evaluation Criteria: Qualifications		1	2	3	4	5
(See Section C above for a complete description of this Criterion.)						
1	RAD conversion of Public Housing and/or HUD Multifamily Projects					
2	Acquisition of new properties and re-syndication of currently owned properties					
3	Professional financial and development consulting					
4	Resumes for key personnel and list of at least three references					
5	Proposed all-inclusive hourly rates					
Total Maximum Points for Qualifications and Proposed Price						
6	EHA Required Forms (2 points each for completion and return of required forms, unless otherwise specified) <i>5 points for following directions of Submittal Layout and Submission Requirements</i>					
	<ul style="list-style-type: none"> • Vendor Information Sheet <ul style="list-style-type: none"> ○ City of Everett Business License 					

	• Section 3 Contracting Preference (1 point for return 2 points for usage)			
	• W-9 Form			
	• OMWBE Report (1 point for return 2 points for usage)			
	• Non-Collusive Affidavit			
	• Hud 5369 A-Representations, Certifications and Other Statement of Bidders			
	• <i>Following directions of Submittal Layout and Submission Requirements</i>			

7. EMAIL SUBMISSION REQUIREMENTS

Only emailed submittals will be accepted, each submittal must be delivered in one (1) attachment to the listed email address, do not sent individual pages or tabbed sections, do not send late section submittals or changes after initial receipt of your packet.

The subject line of the email should be titles as follows:

"Company Name--Submittal for Professional Services: Project 2019-05"

The name of your attachment should be titled as follows:

"Company Name-Submittal to 2019-05"

Due Date and Place for Submission of Proposals: Electronical Submittals must be received by the Everett Housing Authority **no later than 5:00 PM PST on February 25, 2019** at the email address indicated below:

submittals@evha.org

8. SELECTION PROCESS

An evaluation panel will rate all responses to this RFP that are received on or before the stated deadline, according to the criteria listed above. Based on its initial evaluation, the panel may:

1. Make a recommendation to EHA's Executive Director and request authority to negotiate a Contract with one or more proposers; or
2. Request additional information from the proposer whose responses appear to have the greatest likelihood of success; and/or
3. Invite one or more proposer whose responses appear to have the greatest likelihood of success to attend an interview/presentation to discuss their proposal; and then make a recommendation to EHA's Executive Director and request authority to negotiate a contract with one or more proposers.

EHA reserves the right to conduct reference checks, at either or at both of the following two points of the evaluation process:

1. After proposals are evaluated, for the proposer with the highest-scoring proposal;

2. In the event that interviews are held, for the proposer with the highest-scoring proposal and interview.

In the event that information obtained from the reference checks reveals concerns about the proposer's past performance and their ability to successfully perform the contract to be executed based on this RFP, EHA may, at its sole discretion, determine that the proposer is not a responsible proposer and may select the next highest-ranked proposer whose reference checks validate the ability of the proposer to successfully perform the contract to be executed based on this RFP. In conducting reference checks, EHA may include itself as a reference if the proposer has performed work for EHA, even if the proposer did not identify EHA as a reference.

By submitting its Proposal in response to this RFP, the Consultant accepts the procurement method used and acknowledges and accepts that the evaluation process will require subjective judgments by EHA and the evaluation panel.

Any protest of the selection process shall be resolved in accordance with EHA's Procurement Policies, which may be reviewed at the following web site address: <http://www.evha.org>

9. CONTRACT NEGOTIATIONS

EHA shall negotiate with the most qualified proposer, as determined by evaluation of the responses and, if applicable, interviews. If EHA is unable to reach agreement with the highest ranked firm, it may negotiate with the second highest ranked firm, proceeding in turn to each firm, in order of rank, until a contract is executed.

- **Basic Eligibility:** The successful proposer must be licensed to do business in the State of Washington, a City of Everett Business License and must have a state Unified Business Identifier (UBI) number. In addition, the successful proposer must not be debarred, suspended, or otherwise ineligible to contract with EHA, and must not be included on the General Services Administration's "List of Parties Excluded From Federal Procurement and Non-procurement Programs" or the Department of Housing and Urban Development's "Limited Denial of Participation" list or the Department of Labor and Industries.
- **Approval of Sub-Consultants:** EHA retains the right of final approval of any sub-consultant of the selected proposer who must inform all sub-consultants of this provision.
- **Other Contracts:** During the original term and all subsequent renewal terms of the contract resulting from this RFP, EHA expressly reserves the right, through any other sources available, to pursue and implement alternative means of soliciting and awarding similar or related services as described in this RFP.

End of RFP 2019-05