

RFQ 230001 LMHA



RFQ 230001

Request for Qualifications for
Co-Developer Partner
for Lake Metropolitan Housing Authority
May 9th, 2023

**Proposals are due at the address shown below no later than 2:00 P.M. on TBD,
June 8th, 2023**

LAKE METROPOLITAN HOUSING AUTHORITY
189 First Street
Painesville, Ohio 44077

RFQ 230001 LMHA

1. NOTICE AND INTRODUCTION

The Lake Metropolitan Housing Authority (the "Authority") invites interested qualified persons or entities (the "**Respondent**") to submit written qualifications to serve as co-developer partner in connection with the development of Low-Income Tax Credit housing development projects throughout Lake County, Ohio. The successful Respondent must demonstrate the financial ability to provide guaranties and indemnifications to satisfy the requirements of a tax credit investor, lenders and state and federal agencies in connection with the construction and operation of a given property.

Land and property currently owned by the LHMA ("**Authority**") and through land/property acquisition throughout **lake County, Ohio**. It is anticipated that development of designated Property will be financed, in part, with low-income housing tax credits issued by the Ohio Finance Authority (OFA).

The selected Respondent will be required to provide the following forms of guaranties and indemnifications (collectively, the "**Guaranties**") unless otherwise agreed to by the Authority:

- Construction completion guaranty;
- Operating deficit guaranty;
- Tax credit compliance guaranty;
- Tax credit repurchase guaranty;
- Loan repayment guaranty;
- Environmental indemnification; and
- Such other guaranties and indemnifications required by a tax credit investor, lender and/or state and federal agencies.

Documents submitted in response to this Request for Qualifications (the "**RFQ**") must be received no later than 2:00 P.M. on June 8th, 2023. Late proposals will not be considered and will not be opened. All responses to the RFQ must include one (1) original clearly marked "Original" and 7 copies clearly marked "Copy." The submission package must be labeled:

**Proposal Response
Co-Developer Partner
Lake Metropolitan Housing Authority**

and addressed to:

**Lake Metropolitan Housing Authority
189 First Street
Painesville, Ohio 44077**

All questions regarding this RFQ must be e-mailed directly to Diana Dilisio no later than 2:00 P.M. on May 19th, 2023. The questions and the answers will be posted on its website, no later than the end of the business day on May 25th, 2023.

The Authority reserves the right to reject any and all proposals.

RFQ 230001 LMHA

2. PROJECT

Description of the Project

The Authority is seeking proposals from qualified, licensed, and insured entities to serve as co-developer partner with the Authority for both 4% and 9% Low Income Housing Tax Credit development projects that will both preserve and expand affordable housing opportunities for low to middle income families throughout Lake County, Ohio and to include possible new housing construction and adaptive reuse of land and property owned by the Authority. The selected Respondent must possess a minimum of 10 years of experience in mixed financing through the sale of low-income tax credits, leveraging Project Based Housing Choice Vouchers and tenant-based rents, and energy tax credits to close on successful affordable housing projects.

The Authority is extremely interested in Respondents possessing experience leveraging additional funding streams that include but are not limited to HOME Funds, HUD insured 221(d)(4) and 223(f) mortgages, and CDBG funds. The selected Respondent must adequately document case studies of successfully funded and self-operated affordable and market-rate housing projects in the following areas.

- New Construction (Mixed-Income Housing)
- Rehabilitation (Mixed Income Housing)
- Adaptive Reuse
- Permanent Supportive Housing

The selected Respondent must demonstrate a track record of working collaboratively with a Housing Authority building strong communities and developing and maintaining strong local partnerships with key stakeholders, community partners, public and private businesses, and organizations.

The selected Respondent and/or its architectural design subcontractor(s) must be a Green Build Certified professional and can demonstrate experience incorporating solutions for sustainable design in housing projects.

In addition to these requirements, the selected Respondent must demonstrate expertise in HUD's Rental Assistance Demonstration program and demonstrate proven experience in helping Housing Authorities further leverage budgetary capital and operating funds.

3. WRITTEN AGREEMENT

The selected Respondent will enter into a Co-Developer Agreement with the Authority. The Co-Developer Agreement will, among other things, delineate the roles of the Authority and the Respondent with regard to the Project and the Guaranties.

4. SUBMISSION AND EVALUATION REQUIREMENTS a. Previous experience developing and managing affordable housing, including both RAD and conventional tax credit housing.

Submission Requirements

Respondents submitting proposals in response to this RFQ must not be debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from a public transaction or contract by any federal, state or local governmental agency.

The following provides guidance on the items the proposal must contain and how the proposal must be organized. The purpose of this information is to establish the requirements, order and format for responses to ensure that the proposals are complete, include essential information and can be fairly evaluated.

RFQ 230001 LMHA

Respondents must limit the length of each section of their response to the page limit shown. Respondents should avoid duplicative materials and redundancies in the proposal. Proposals should be prepared in the following order:

A. Cover Letter (1 page)

The cover letter must identify the Respondent and identify the primary contact person. Please include the primary contact person's phone number, facsimile number and e-mail address. The letter must be signed by an authorized principal of the Respondent and include a statement that the proposal will remain valid for not less than 180 days from the date of the Authority's selection of the Respondent.

Organizational Chart

Respondents shall submit an organizational chart showing all of the individuals/firms that will be assigned to this development effort.

Profile of the Development Partner

Provide an overview of Developer Partner(s)' experience in developing housing similar to what is proposed.

Profile of Development Team Members

Include resume of all team members to include an overview of their experiences in contributing to affordable housing conversion.

List and Executive Summary of Recent Relevant RAD and LIHTC/Mixed Financing Development Experience

Provide a detailed list with summary description of recent LIHTC projects.

B. Certifications

The Respondent shall submit the following signed certifications/documents with its proposal:

- a. Certifications and Representations of Offerors (Form HUD-5369-C)
- b. Form of Non-Collusive Affidavit;
- c. Certification Regarding Lobbying; and
- d. Certification Regarding Debarment, Suspension, and Other Responsibility Matters.

C. Experience and Qualifications (40 Points) Provide information on the Respondent, including the following:

- a. Previous experience developing and managing affordable housing, including both RAD and conventional tax credit housing.
- b. Previous experience providing development and financial advisory services to Public Housing Authorities.
- c. Experience in successful management and completion of mixed-finance development projects under HUD programs.
- d. Previous experience and success in securing financing for RAD conversion projects including Low-Income Housing Tax Credits, Tax Exempt Bond Financing and HUD insured mortgages.
- e. Financial capacity to complete the project.
- f. MWBE, Local Participation and Section 3: Provision for MWBE and Section 3 local participation, equal opportunity, affirmative action and past experience in achieving such participation.
- g. References

D. Financing Capacity (40 Points)

Attach annual financial statements audited or prepared by a CPA for the Respondent. The financial statements must include the most current year for which audited or CPA prepared financial statements are available. The financial statements must include Income Statements, Balance Sheets and Statements of Cash Flow. Additionally, submit one bank reference for the Respondent. Financial statements may be placed in a separate sealed envelope marked "confidential."

E. Fees and Expenses (20 Points)

Specify all fees or expenses that the Respondent will require in connection with providing the Guaranties. Respondent shall provide a Fee Schedule for any Consulting Services not associated with the development of a project that would

RFQ 230001 LMHA

otherwise not be considered a pre-development expense. The Fee Schedule will list the individual, their hourly rate, and a percentage of time allocated for the work. All Consultant Services will be commissioned on a Task Order basis with a cost estimate provided for review and approval prior to any commencement of work.

Evaluation Criteria

Each proposal will be evaluated based on its responsiveness to this RFQ.

The following evaluation factors will be used by the Authority in determining the Respondents who are deemed within a competitive range for further consideration. Interviews may be used to identify the top-rated Respondent. Each proposal has a possible score of 100 points.

Points Available	Evaluation Criteria	Description of Criteria
40 points	Experience and Qualifications	Demonstrated ability, experience, capacity to complete RAD conversions
40 Points	Financial Capacity	Overall financial strength of the Developer Partner.
20 Points	Fees and Expenses	Reasonableness of fees and expenses

5. SELECTION PROCESS AND SCHEDULE

Selection Process

All responses to this RFQ will be initially reviewed to determine compliance with the submission requirements specified in this RFQ. Proposals that do not comply with these requirements may be rejected without further review.

All Respondents that submit a proposal in response to this RFQ will be notified when a selection is made. The Authority reserves the right to request supplemental information that it deems necessary to make a selection. The Authority also reserves the right to evaluate and rank the proposals without further input from the Respondents. Therefore, proposals should be completed as initially submitted. The Authority reserves the right to accept the proposal which, in its judgment, will best serve the interests of the Project, based upon the evaluation criteria.

The Authority may consider as unacceptable any proposal for which information is lacking or whose submission represents a deviation from the requirements of this RFQ. Minor omissions, informalities or irregularities may, at the sole option and discretion of the Authority, be corrected subsequent to the submission due date.

Following the Authority's review of the proposals, one or more Respondents may be asked to make a brief presentation and/or respond to questions from the Authority and its Board of Commissioners. The Authority shall recommend the successful Respondent to its Board of Commissioners for official selection approval.

RFQ 230001 LMHA

Procurement Overview and Schedule

AUTHORITY CONTACT PERSON (NOTE: Unless otherwise specified, any reference herein to “Contracting Officer” or “(CO)” shall be a reference to Diana Dilisio.)

Diana Dilisio, Executive Assistant
E-mail: ddilisio@lakemetrohousing.org
TDD/TTY: 711 or 1-800-750-0750

HOW TO OBTAIN THE RFQ DOCUMENTS ON THE EPROCUREMENT MARKETPLACE

1. Access ha.internationaleprocurement.com (no “www”).
2. Click on the “Login” button in the upper left side.
3. Follow the listed directions.
4. If you have any problems in accessing or registering on the eProcurement Marketplace, please call customer support at (866)526-9266.

PRE-PROPOSAL CONFERENCE QUESTION SUBMITTAL DEADLINE PROPOSAL SUBMITAL RETURN & DEADLINE

NONE SCHEDULED

May 19th, 2023

June 8th, 2023

Administration Offices: 189 First Street, Painesville, OH 44077 (The sealed “hard copy” proposal documentation must be received in-hand and time-stamped by the Authority by no later than 2:00 PM EDT on this date).

Dates are shown below. Changes in the schedule will be posted on our website at <https://www.lakehousing.org> and in the eprocurement portal at <http://ha.internationaleprocurement.com>. (no “www”)

Issue RFQ May 9th, 2023

Final day to submit written questions May 19th, 2023.

Responses to questions issued, if any May 25, 2023

Proposals due June 8th, 2023

Review and scoring June 15th, 2023.

Notify Respondents selected for interviews, if any June 20th, 2023

Conduct interview(s), if any June 27th, 2023

Announce selected Respondent June 29th, 2023.

Proposal Due Date

Proposals are due no later than 2:00 P.M. on June 8th, 2023 and must be addressed as follows:

**Proposal Response
Co-Developer Partner
LHMA**

and addressed to:

**Lake Metropolitan Housing Authority
189 First Street
Painesville, Ohio 44077
Diana Dilisio**

RFQ 230001 LMHA

The above stated deadline is firm as to date and hour. The Authority will treat as ineligible for consideration any proposal that is received after the deadline. Faxed and electronic proposals will not be accepted.

6. GENERAL INFORMATION

Right to Accept or Reject

The Authority reserves the right to accept or reject any or all proposals. The Authority may make such investigation as it deems necessary to determine the ability of a Respondent to provide the Guaranties, and the Respondent will furnish to Authority, all such information and data for this purpose as the Authority may request. The Authority reserves the right to reject any Respondent if the evidence submitted by or investigation of such Respondent fails to satisfy the Authority that such Respondent is properly qualified to provide the Guaranties.

Questions

Questions concerning this RFQ shall be submitted via e-mail no later than 2:00 P.M. on May 19th, 2023, to ddilisio@lakemetrohousing.org. All questions and responses to questions regarding this RFQ will be posted on the Authority's website @ [www.https://lakehousing.org](https://lakehousing.org), TBD 2023.

Respondent's Costs

Each Respondent will be responsible for all costs incurred in preparing a response to this RFQ. The selected Respondent also shall be responsible for all costs incurred by it during contract negotiations.

Right to Disqualify

The Authority reserves the right to disqualify any Respondent who fails to provide information or data requested or who provides materially inaccurate or misleading information or data. The Authority further reserves the right to disqualify any Respondent on the basis of any real or apparent conflict of interest that is disclosed or submitted by the Respondent or any other data or information available to the Authority. This disqualification is at the sole discretion of the Authority.

Contact with the Authority

All communications with the Authority shall be via e-mail (no telephone calls) to ddilisio@lakemetrohousing.org

Proposal Timeframe and Modification

All proposals shall remain valid for not less than 180 days from the date of the Authority's selection of the Respondent. A proposal may not be modified, withdrawn or canceled by a Respondent for 180 days following the proposal deadline and each Respondent so agrees in submitting its proposal. Proposals may be withdrawn, altered and/or resubmitted at any time prior to the submission deadline.

Inconsistency or Error in the RFQ

Any Respondent believing that there is any ambiguity, inconsistency or error in the RFQ shall promptly notify the Authority via e-mail of such apparent discrepancy. Failure to so notify the Authority by the proposal due date will constitute a waiver of claim of ambiguity, inconsistency or error.

Proposer Certification

By submission of a proposal, the Respondent certifies that the Respondent has not paid or agreed to pay any fee or commission, or any other item of value contingent on the award of a contract to any employee, official or agent of the Authority. The Respondent also certifies that it has not given or offered any gratuities in the form of entertainment, gifts or otherwise to any employee, official or agent of the

RFQ 230001 LMHA

Authority. The Authority reserves the right, by written notice to the Respondent, to terminate the right of the Respondent to proceed under any contract related to this RFQ if it is found that the Respondent has given or offered commissions or gratuities as prohibited by this section.

Disadvantaged and/or Minority and Women-Owned Business Enterprises

The Authority extends to each individual and firm an equal economic opportunity to compete for Authority's business and strongly encourages voluntary use of disadvantaged and/or minority- or women-owned businesses to reflect both the industry and community ethnic composition.

Protest of Award

Protests of an award recommendation must be received within ten (10) calendar days after the award recommendations are posted on the Authority's webpage. Protests shall be in writing and filed with the Authority at the following address:

**Lake Metropolitan Housing Authority
189 First Street
Painesville, Ohio 44077**

The protest must include all of the following: (a) the name, address and telephone number of the protester; (b) the signature of the protester or its representative; (c) identification of the RFQ; (d) a detailed statement of the legal and factual grounds of the protest including copies of relevant documents; and (e) the form of relief requested.

The Authority retains the right to reject all protests not filed within this time or those found to be without merit.