



REQUEST FOR QUALIFICATIONS
Developers Services for Olsen / So. Chandler affordable housing Development
Paso Robles, Ca

The Housing Authority of the City of Paso Robles (PRHA) is soliciting qualifications for a Partner (Partner) for the Olsen /So. Chandler Development (Development). PRHA's selection process under this RFQ will result in the selection of one (1) Partner for one (1) phase of 80 or less units for an affordable housing multifamily project. PRHA reserves the right to substitute Affordable Housing Paso Robles (AHPR) in lieu of PRHA. AHPR is a qualified 501 (c)(3) not for profit organization that has received its Organizational Clearance Certificate for Welfare Organization Exemption. The successful party will prove through its response that it possesses the qualifications necessary to implement a comprehensive development Project. The selected Partner, working in conjunction with PRHA, shall have expertise in design, financing, pre-development, construction, leasing, property management and compliance activities in accordance with an agreed upon Project. Interested firms or entities with successful affordable housing finance development and property management experience in California, including successful LIHTC applications as a General Partner and Property Management experience that meet California Tax Credit Allocation Committee (CTCAC) maximum scoring criteria are encouraged to respond to this RFQ.

RFQ packets may be e-mailed by PRHA, accessed online at www.pasoroblesha.org or obtained at the PRHA office, 901 30th St., Paso Robles, CA 93446. If you have questions, or if you wish to be notified of changes or amendments to this RFQ, please contact David Cooke, Executive Director, at 805-238-4015 ext. 204, or dcooke@pasoroblesha.org

All responses must be sealed and clearly marked "Request for Qualifications: Developers Services for Olsen / So. Chandler Affordable Housing Development Project" along with an email copy with all attachments. Responses must be delivered to 901 30th St., Paso Robles CA 93446. PRHA reserves the right to reject any or all responses and waive any informalities in the response process. Responses are due by July 21, 2021 at 4:00PM/PST.



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THE HOUSING AUTHORITY OF THE CITY PASO ROBLES (PRHA)

REQUEST FOR QUALIFICATIONS DEVELOPER SERVICES FOR AFFORDABLE HOUSING DEVELOPMENT & PROPERTY MANAGEMENT

INTRODUCTION:

GENERAL:

The Housing Authority of the City of Paso Robles (PRHA) is a public entity that was formed in 1942 to provide federally subsidized housing and housing assistance to low-income families within the Paso Robles, CA area. PRHA is headed by its Executive Director and is governed by a seven-person Board of Commissioners. PRHA is subject to the requirements of Title 24 of the Code of Federal Regulations and PRHA's Procurement Policy. Though brought into existence by a Resolution of the City of Paso Robles, PRHA is a separate entity from the City of Paso Robles. PRHA is seeking responses to a Request for Qualifications (RFQ) from interested development teams for the development, creation and implementation of a multi-family Affordable Housing Project.

PRHA's selection process under this RFQ will result in awarding co-development rights for the Project to (1) Partner for the proposed project. The successful party will prove through its submittal that it possesses the qualifications necessary to implement a comprehensive affordable housing Project for the proposed Development. The selected Partner, working in conjunction with PRHA, shall have expertise in and /or be responsible for design, financing, pre-development, construction, leasing, property management, and compliance activities in accordance with the agreed upon Project. It is the intent of PRHA to negotiate with the selected Partner and to execute a development agreement that will serve as the controlling document for implementation of the Project. Interested individuals, firms or entities with significant, successful Mixed-Finance Mixed-Income Rental Housing development experience in California are encouraged to respond to this RFQ.

Background:

PRHA owns or manages various affordable housing units, along with a myriad of supportive service programs for its residents. PRHA dedicates itself to creating and sustaining healthy communities that promote quality affordable housing that promotes quality of life through a healthy community. PRHA pursues affordable housing opportunities to address emerging trends and respond to the challenges of the future. PRHA is committed to enhancing the stock and availability of quality affordable low-income housing in the Paso Robles area.

This RFQ is for the development of a new affordable multifamily Apartment Project located in Paso Robles. The Development will consist of approximately 70-80 affordable multifamily units, community facility, office, laundry room and recreational common areas. There will be a mix of different bedroom unit sizes

Development Strategy:

The selected Partner will negotiate specific terms with PRHA concerning the details of the Development Project.

The Partner will assist PRHA in securing private/ public sector financing including Low Income Housing Tax Credits (LIHTCs), Construction and Permanent financing, and/or other creative public and private financing options for the redevelopment of the Development.

PROJECT SCOPE (WORK TO BE PERFORMED)

General Overview:

The Partner selected under this RFQ will be an integral partner in the effort to assist PRHA in developing affordable, high quality, energy efficient, and sustainable housing for Paso Robles families. The Partner will be required to work closely with PRHA and other community stakeholders throughout the development effort.

The Partner is required to have completed multiple successful LIHTC applications / projects with development and property management experience as a Developer or co-Developer Partner within California. The ability to coordinate such an undertaking must be clear from the qualifications submitted (Must meet CTCAC experience criteria for maximum points on CTCAC application). Once selected, the successful respondent will make a good faith effort to enter quickly into a development agreement with PRHA to develop the Project. A Memorandum of Understanding (MOU) will be negotiated to enable the selected Partner to complete all necessary pre-development activities.

It is envisioned that the Development will be an affordable housing multifamily development with affordable units renting to mix of households ranging from 30% to 60% of AMI and below. PRHA recognizes that its development Project depends on a number of outside funding sources and creative financing that include, investor equity, LIHTCs, construction financing, permanent financing, and other sources of soft financing.

Development /Finance

The Partner shall work in conjunction with PRHA to development a comprehensive Financing Plan in addition to a Development Plan to construct an affordable housing project similar in architectural style for the overall Olsen/ So. Chandler Specific Development Plan recommendations. The Project shall include a Project proforma (Submit sample of recent profroma with submission) that will include budget, proposed sources, uses of funds, CTCAC rent schedule for maximum points, operating budget, construction budget, architectural floor, Project and conceptual design elevations, civil and landscaping Project s and a detailed development schedule plus any other requirements set forth by CTCAC or other jurisdictions. The Partner in conjunction with PRHA will also be responsible for all predevelopment activities associated with the development Project. These responsibilities (if needed) will include, but are not limited to, appraisal, market studies needed to obtain financing, land and utility location surveys, engineering design of all infrastructure improvements, soil reports, environmental reviews and any other third party studies and reports as required by the City of Paso Robles.

Co-Developer Role:

It is expected that the Partners will form a limited partnership for the purpose of ownership. A non-profit subsidiary affiliate of PRHA may be substituted as the co-general partner with the Co-Developer. The Master Developer of the Olsen / So. Chandler Specific Plan is providing land as a charitable contribution plus certain site improvements and is requiring \$1,275,000 for certain backbone improvements as described in the Olsen. So. Chandler master development agreement. The ultimate Limited Partnership ownership structure is expected to generate a 100% ad valorem tax exemption for the Project.

Community Stakeholders: The Partner in conjunction with PRHA will be required to communicate and coordinate development activities with community stakeholders, neighborhood associations, local faith-based organizations, and units of local government in the development area. It is expected that the Partner and PRHA will if necessary seek public input by scheduling and coordinating meetings, community workshops and other open forums to assure that all stakeholders in the development process are continuously kept abreast of ongoing activity.

Market Analysis and Appraisal(s): A detailed market study shall be required to determine the overall feasibility of the agreed upon Project by the Partners and as required by the LIHTC program and Lenders. The Partners will also be responsible for any additional market analysis and appraisals to develop and obtain financing for the development Project.

Financing: The Partners will have primary responsibility for arranging equity and debt financing to leverage funds available for the development and to secure all financial commitments necessary for successful completion of the Project (hard and soft costs). It is the expectation of PRHA in conjunction with the selected Partner will seek financing from traditional and non-traditional sources, to cover all costs associated with the Project. The Partner must also work with PRHA in the preparation of documents necessary to provide all evidentiary material, financial guarantees, bonding requirements and assurances as required by Investors and Lenders.

The Partners will be responsible for the preparation of applications to obtain LIHTC allocations from the California Tax Credit Allocation Committee (CTCAC) in accordance with the current Qualified Allocation Project (QAP) and Uniform Multifamily Rules. The Partner will provide the experience certificate needed to meet the threshold requirement under the QAP and Uniform Multifamily Rules. The Partner in conjunction with PRHA will be responsible soliciting five up to (5) or more LIHTC investors /syndicators and lenders to bid on LIHTCs received for this development Project. PRHA shall have the right to approve the identity of the LIHTC investor(s) and lender(s) selected and the terms of the letter of intent.

Design/Approvals/Construction:

The selected respondent in conjunction with PRHA will be responsible for the development of design and construction documents. (See preliminary design attached) The selected Partner will be expected to utilize design principles that are compatible with the neighborhood and community surrounding newly constructed Oak Park Community. As part of PRHA's application, PRHA is committed to pursuing the National Green Building Standard (NGBS), LEED-H certification or its equivalent, and/or Green Building program certification for the new construction. Determinations about the components material's and scope of the construction, must be made with these certifications in mind. The design of the Project shall be subject to PRHA's review, comment and approval. The Partners will also be responsible for obtaining all necessary permits and any required approvals.

The Partner in conjunction with PRHA will be responsible for securing a General Contractor for the Project. Both parties will participate accordingly in an RFQ or RFP process to determine the General Contractor.

The General Contractor will construct, or procure construction, of all units of housing identified in the Project or subsequent revisions agreed upon by PRHA. PRHA shall have the right to review and approve any construction contract relating to the Project. The Partners will oversee construction, ensure completion in a timely and cost effective manner and ensure that all required occupancy permits and other necessary approvals are obtained after construction completion for occupancy and operation of the Project.

The contractors may be required to pay Davis Bacon Wage Rates (DBWR) and/or California state prevailing wage rates as determined by the Department of Industrial Relations (DIR) (depending on financing) and to submit any/all required documentation in compliance with DBWR and/or DIR. This requires that wages be paid at a rate not less than wage rates for corresponding classes of employees on construction of similar character in the locality in which the work is performed as determined by the US Secretary of Labor and or California's DIR.

The construction contract shall set forth either a fixed price or a guaranteed maximum price, must be pre-approved by PRHA and shall provide for assignment to PRHA or its affiliate or designee in the event of termination of the relationship with the Partner.

Marketing Project:

The Partner shall have expertise in this area and demonstrate an effective lease-up strategy to obtain the initial occupancy and strategy with PRHA Management to maintain occupancy.

Development Agreement:

Once selected, the successful respondent will make a good faith effort to quickly enter into a development agreement with PRHA for the development. A MOU will be negotiated as needed to enable the selected Partner to complete all necessary pre-development activities. This agreement will cover all pre-development activities undertaken by the Partners.

All fees and costs to be negotiated under the Development Agreement must comply with all applicable laws. The negotiated development fee shall be a firm, fixed fee inclusive of all direct and indirect costs of the Partner. The Partner in response to this RFQ will propose a fee sharing arrangement between PRHA and itself.

Property Management: PRHA or its designee shall have the right, from the onset, to initially manage the Project on a day-to-day basis, subject to entering into a co-management agreement with the Partnership on terms and conditions customary in the industry and acceptable to the lenders and the limited partners. This shall include development of operational policies and procedures, marketing and lease-up of rental units, and the provision of all day-to-day management and maintenance services as required.

SUBMISSION REQUIREMENTS

Method of Solicitation

It is the intent of PRHA to select a Partner based on qualifications and enter into negotiations with the selected Partner. The respondent is to follow the schedule provided below in the processing of this RFQ. It should be noted that the dates listed are estimated and may be changed based on the needs of PRHA. Changes in dates will be issued via an addendum to this solicitation.

CO-DEVELOPER(S) SELECTION SCHEDULE ESTIMATED DATE

Availability of RFQ Package	June 17, 2021
Deadline for Submission of Questions to PRHA	July 5, 2021
Issuance of Response to Questions	July 9, 2021
Proposal due Date and Time	July 21, 2021 4:00 PM
Preliminary PRHA Evaluation Completed	July 30, 2021
Shortlisted Interviews of Shortlist Firms (if necessary)	August 4, 2021
Recommendations to PRHA Board	August 10, 2021

CONTENT OF SUBMISSION

Respondent shall submit the Statements of Qualifications below in the order listed.

A description of the scope and nature of development experience

A listing of all new construction development Projects awarded and/or constructed over the past ten (10) years with the following information: name and location of development; number of residential units; total Project development costs, total Project construction costs, type of housing, Project proforma to include sources and uses of funds and funding sources; date Project commenced and date completed, name and address, email and telephone number of the client/owner, and name of each/all development team partners.

Experience with CTCAC regulations and other affordable housing programs, including LIHTC Tax Exempt Bonds, FHLB AHP, CDBG, HOME, USDA, HUD, California State Housing Finance Programs and Housing Trust Funds and any other sources of funding. Experience working with community stakeholders during the redevelopment process.

A minimum listing of five (5) most recently completed CTCAC multifamily affordable development Projects

placed in service over three (3) years developed by the respondent in the State of California.

A description of the respondent's knowledge of real estate financing methods.

The respondent will describe his/her past use of funding tools for new construction multifamily developments, such as Tax Exempt Bonds, LIHTCs, FHA insured mortgages, HOME funds, Housing Trust Funds, development funds, and private mortgages. He/she shall include identification of all successful financing secured from competitive application processes for residential development Projects over the past five (5) years within the State of California.

Names, roles and resumes of key personnel who will constitute the Development Team and Property Management Company. This section shall include, if applicable, but not be limited to, an organizational chart identifying identity of interest corporations that will participate in these Projects and the address of the principal office of each entity of the team.

Minimum Five (5) corporate references

These references shall include a banking reference, tax credit investor, and current or recent client references for development Projects the respondent has successfully completed within the past ten (10) years.

DIRECTION FOR SUBMISSION

The respondent's submission should at minimum be submitted with tabbed numbers for the sections identified above. All materials shall be submitted on an 8.5" x 11" format with no smaller than a 12-point standard font. Respondent shall submit one (1) original (marked "Original") and three (3) copies (marked "Copy") of the proposal along with an e-mail copy and attachments. The submission shall be delivered to PRHA by 4:00 p.m., local time, July 21, 2021, without exception, at the following address, to be deemed responsive and eligible for consideration:

Housing Authority of the City of Paso Robles (PRHA)
Attention: David Cooke, Executive Director
901 30th Street
Paso Robles, CA 93446

Questions may be emailed to dcooke@pasoroblesha.org and must reference the RFQ as "Request for Qualifications". To assure that the respondent's response arrives at the proper place on time and to prevent opening by unauthorized individuals, the original and all copies of the proposals must be submitted in a sealed envelope. The outside of the envelope must state:

“Request for Qualifications: Developers Services for Development”

Company name and address

Due date July 21, 2021.

Faxed or electronic submissions of the Request for Qualifications will not be accepted. Once received by PRHA, submissions will not be returned.

SELECTION PROCESS

PRHA will select a minimum of a three-person committee including the Executive Director to evaluate each of the responsive “hard copy” proposals submitted in response to this RFQ. PLEASE NOTE: No respondent shall be informed at any time during or after the RFQ process as to the identity of any evaluation committee member except the Executive Director. If, by chance, a respondent 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 except the Executive Director. The Executive Director is the only person at PRHA that the respondents shall contact pertaining to this RFQ. Failure to abide by this requirement may (and most likely will) cause such respondent to be eliminated from consideration.

Evaluation Criteria

The RFQ will be evaluated through consideration of several factors. The Evaluation Committee will review all documents in the submissions and award points in accordance with the following criteria:

No.	Point Value	Factor type	
1.	20	Objective	The costs and fees the respondent proposes to charge for all services.
2.	20	Subjective	Demonstrated Experience in performing similar development work and the proposer's demonstrated successful past performance (including meeting costs, schedules and performance requirements) of contract work substantially similar to that required by this solicitation as verified by reference checks or other means. Knowledge of affordable housing development. Minimum of 7 developments in operations for a minimum of 3 years.
3.	15	Subjective	The respondent demonstrated experience in performing similar general contractor/construction management work and the proposer's demonstrated successful past performance (including meeting costs, schedules and performance requirements) of contract work substantially similar to that required by this solicitation as verified by reference checks or other means. Including <i>experience</i> obtaining the National Green Building Standard (NGBS), Green Point rated program or LEED certifications to meet CTCAC sustainable building methods for new construction Projects. Minimum of 7 years' experience constructing Projects of similar size and scope.
4.	15	Subjective	Financial Capacity and Access to Funding..... Financial stability of the Development Team as demonstrated through prior success in obtaining funding for development Projects, and as demonstrated through submitted recent audited financial statements.
6.	15	Subjective	Demonstrated record of financing Projects through a variety of funding sources, and knowledge and experience working with the funding providers identified in this Request. In particular, successful syndication of both 9% and 4% LIHTCs and Tax Exempt Bond financing.
7.	15	Subjective	General quality of the presentation; design quality of existing properties presented in the oral interview; and, overall response to interview questions.
Total	100	Points	

SELECTION

The Evaluation Committee will score each proposal in accordance with the stated criteria prior to the interviews. A minimum of the two highest scoring Development Teams will be shortlisted.

Oral Interviews- The evaluation committee will conduct an oral interview with the shortlisted respondents.

Site Visits - PRHA reserves the right to conduct site visits of the shortlisted Development Team(s) place of business and / or Projects completed. The purpose of the site visits will be to confirm information provided in the proposal package or presented at the oral interview. The site visit will not be scored independently from the stated evaluation factors, but such factors may be adjusted if the evaluation committee determines that information previously provided is not consistent with information or observations gathered during the site visit.

Final Recommendation - The Recommended Partner will be selected based on the highest total score for all evaluation factors combining the individual scores of each member of the evaluation committee. The Evaluation Committee will provide the final recommendations and will be responsible for final approval of the Partner.

GENERAL INFORMATION

Conflict of Interest

The respondent warrants that to the best of its knowledge and belief, and except as otherwise disclosed, it does not have any organizational conflict of interest. Conflict of interest is defined as a situation in which the nature of the work under this solicitation and the firm's organizational, financial, and contractual or other interests are such that: The respondent may have an unfair competitive advantage; or

PRHA reserves total discretion to determine the proper treatment of any conflict of interest disclosed under this section.

Cost of Proposal

All costs incurred, directly or indirectly, in response to this RFQ shall be the sole responsibility of and shall be borne by the respondent.

Awards

Contracts shall be awarded in accordance with the terms and conditions of this RFQ. PRHA reserves the right to negotiate and award any element of this RFQ.

Proposal Tabulations/Notification

PRHA will notify the winning applicant either verbally and in writing after the award is made. Each unsuccessful respondent will be notified in writing promptly upon award.

Assignment or Transfer

The successful respondent shall not assign or transfer any interest in the contract, in whole or in part, without written approval of PRHA. Claims for sums of money due, or to become due, from PRHA pursuant to the contract may be assigned to a bank, trust company or other financial institution. PRHA is hereby expressly relieved and absolved of any and all liability in the event a purported assignment or subcontracting of the contract is attempted in the absence of the Partner obtaining PRHA's prior written consent.

Insurance

The successful respondent shall maintain a policy of professional liability insurance in the amount of at least \$5,000,000.

Workers' Compensation in accordance with the State of CA rules and regulations.

General Liability insurance with a single limit for bodily injury of \$2,000,000 per occurrence and property damage limit of no less than \$2,000,000 per occurrence. The insurance may have a combined aggregate of coverage amounting to no less than \$2, 000,000. Such insurance shall protect respondent against claims of bodily injury or Death and property damage of others.

Automotive liability on owned and non-owned motor vehicles used on the site(s) or in connection herewith for a combined single limit of bodily injury and property damage of not less than \$2,000,000 per occurrence.

All insurance shall be carried with companies that are financially responsible and admitted to do business in the State of California. Respondent shall not permit the insurance policies required to lapse during the period for which the Agreement is in effect. All certificates of insurance shall provide that no coverage may be cancelled or non-renewed by the insurance company until at least thirty {30} day's prior written notice has been given to PRHA.

The successful respondent shall furnish to PRHA a certified copy of the policies covering the work as required in the specifications as evidence that the insurance required will be maintained in force for the duration of the contract and for at least one year thereafter.

Standards of Conduct

The successful respondent shall be responsible for maintaining satisfactory standards of its employees' competence, conduct, courtesy, appearance, honesty and integrity. It shall be responsible for taking disciplinary action against any of its employees as may be necessary.

Supervision

The successful respondent shall provide adequate competent supervision at all times during the performance of the agreement. The Partner or their designated representative(s) shall be readily available to meet with PRHA personnel. The successful respondent shall provide the telephone numbers and email addresses where its representative(s) can be reached.

Nondiscrimination

The Partner agrees that they will abide by Federal, State and local laws including City ordinances incorporated by reference herein.

Section 3 Clause

Every applicant, recipient, contracting party, contractor and subcontractor shall incorporate or cause to be incorporated a "Section 3 Clause" in all contracts for work in connection with a Section 3 covered development.

Cancellation

PRHA reserves the right to cancel this RFQ, or to reject, in whole or in part, any and all proposals received in response to this RFQ, upon its documentation that such cancellation or rejection is in the best interest of PRHA. PRHA further reserves the right to waive any minor informalities or the failure of any Responder to comply therewith if it is in the public interest to do so. No contractual right shall arise out of the process of negotiation until such time as PRHA and the selected firm have signed an agreement.

Laws

The laws of the State of California and applicable federal law shall govern the contract.

Contract Documents

Written contract documents will be prepared by PRHA legal counsel. Modifications may be adopted based on final negotiations and specific requirements of the contract under this particular RFQ.

Travel

All travel and miscellaneous expenses will be borne by the respondent.

Contract Award

The Partner's contract as described in this document shall be subject to the approval of PRHA Board of

Commissioners.

Respondent hereby represents, warrants, agrees, acknowledges and certifies to PRHA that (respondent must initial and sign below, accordingly):

The individual whose initials are subscribed above, and whose name is subscribed hereto, in his or her individual capacity, expressly represents, warrants, and certifies that the information contained in this certification and in this response, including any and all supplements, additions, clarifications, or other materials or information submitted to PRHA in connection therewith are true and correct and the Applicant has undergone sufficient investigation to affirm the validity of the statements made. Further, the Applicant hereby expressly represents, warrants, and certifies that the individual whose name is subscribed hereto has read and understands all the regulations referenced in this form, including the final then current QAP, Uniform Multifamily Rules, §42 of the Internal Revenue Code, California Government Code, Chapter 2306 and applicable governing regulations of HUD, the County of San Luis Obispo and the City of Paso Robles. By signing this document, the undersigned, in their individual capacity, is affirming under penalty of local, state or federal laws regarding the making of false statements to governmental bodies or the false statements or the providing of false information in connection with the procurement of allocations or awards that all materials relating thereto are true, correct, and complete in all material respects.

By: _____ Date _____

Signature / Title

Printed Name _____

On behalf of: _____

(List organization responding to RFQ that the individual is signing on behalf of)