

**FLORIDA REDEVELOPMENT ASSOCIATION
REQUEST FOR PROPOSALS**

**Request for Proposals (RFP) For
Creation of Training Materials for a Professional
Certification Course on
Housing as a Redevelopment Tool**

The Florida Redevelopment Association (FRA) is seeking Proposal from individuals, firms, or consortiums interested in developing a training module for the FRA professional certification program. The contract for services shall be for a period ending December 30, 2015. The RFP guideline package can also be obtained at www.redevelopment.net, or by email from Carol Westmoreland at cwestmoreland@flcities.com. Responses to the RFP are due on or before 3:00 pm on November 14, 2014, and must be mailed or delivered to:

**Carol Westmoreland, Executive Director
Florida Redevelopment Association
301 S. Bronough Street, Suite 300
Tallahassee, FL 32302-1757**

The FRA reserves the right to accept or reject any and all responses, to waive irregularities, and to re-advertise as may be determined to be in the best interest of the FRA. The FRA accepts no responsibility for any response not reaching the prescribed delivery point within the time period stipulated.

FLORIDA REDEVELOPMENT ASSOCIATION REQUEST FOR PROPOSALS

Guidelines for Submitting Proposals for Development of Training Materials and Teaching a Professional Certification Course on Housing as a Redevelopment Tool

1. INTRODUCTION:

The Florida Redevelopment Association (the FRA) is seeking the services of individuals or firms (the Responder) interested in providing professional services for the creation of training modules for the association's professional certification program. It is anticipated that one Responder may be selected for a contract period to end on December 30, 2015. During this period, the FRA shall reserve the right to seek proposals and/or responses from other firms or individuals for other training modules as deemed to be in the best interest of the FRA.

This RFP seeks assistance in developing a training module on sing housing as a redevelopment tool. The FRA has developed an initial outline for the module which is included as Attachment C. However, the FRA desires input from the selected Responder on the scope of the training and the outline provided in Attachment C should only be considered a starting place.

The FRA selection committee may short-list as many as three individuals or firms, and conduct personal interviews prior to final selection from among the Responders.

2. SCOPE OF WORK:

- a) Develop an understanding of the scope and scale of the training material required by the FRA.
- b) Work with the FRA Certification Committee to develop the module. The Certification Committee meets on the fourth Friday of every other month in Kissimmee, Florida. On alternate months, the Committee meets telephonically. The selected Responder would be expected to attend some meetings during the initial development stage, though attending telephonically would be acceptable at later stages of the development of the module. The first formal training session will be at the 2015 FRA Annual Conference.
- c) Develop the training module for a one day, 5-6 hour presentation to be done in classroom format. This includes the production of a PowerPoint presentation, a Study Guide to be provided on CD to attendees three weeks prior to the formal training, an instructor's teaching guide no later than a month prior to the formal training, and 100 test questions, of which 50 are to be administered by the Responder at the end of the formal training. **The Responder is expected to teach and test the module one time as part of the development of the module. It is anticipated that the test teaching will be done in June or July of 2015 in Kissimmee.**
- d) The training module should be developed in logical segments so that it could be broken down into "mini-teachings" that could be presented through webinars or other such teaching venues.
- e) The successful Responder would be required to teach the module to a "test" group upon completion and make adjustments as necessary before the first formal training based on the

results of that "test" teaching. **The "test" teaching is not the one formal training session referenced in Section 2(c).**

- f) If requested by the Board, the selected responder should be prepared to attend at least one FRA Board Meeting, date and location yet to be determined.
- g) A proposed outline of the module is attached to this RFP. FRA is interested in evaluating any suggestions that the successful Responder wishes to make related to changes or additions to this outline.
- h) The developed training materials must be delivered or transmitted to the FRA in a paper copy and in a digital format acceptable to the FRA that can be modified and updated without the acquisition of proprietary or other software.
- i) **If the Responder does not desire to teach the module periodically, this should be indicated clearly as a part of the Response. Otherwise, the cost for development of the curriculum and the cost for teaching of each module (after the first teaching required in Section 2 above), should be detailed separately.**

3. INFORMATION REQUESTS

For information pertaining to this Request for Qualification (RFP), contact the Executive Director of the FRA in writing as shown in Section 14. Such requests for information shall be in writing and for clarification purposes only. Material changes, if any, to the scope of services or response procedures will be transmitted only by an email addendum.

4. ANTICIPATED RFP TIMETABLE

If you are planning upon submitting a response to the RFP, please notify Carol Westmoreland at cwestmoreland@flicities.com so you will be provided with any addendums to the RFP,

a)	Release of RFP	October 2, 2014
b)	Deadline for Written Questions	October 31, 2014
c)	Response Due Date at 3:00 pm	November 14, 2014
d)	Evaluation of Responses and Short Listings Completed by	December 1, 2014
e)	Approval of Selection by the Executive Committee	December 10, 2014
f)	Contract Executed with selected Proposer	December 31, 2014

All dates are tentative. The FRA reserves the right to change scheduled dates.

5. FORM OF THE RESPONSE

All Responders shall submit one (1) original and six (6) **bound** copies of their Proposal in a sealed envelope or package. The response shall be on letter size paper. All Responders shall include Responders Certification Form, and copy of IRS Form W-9. One copy shall also be provided digitally on a CD or DVD in PDF format

The response must be divided into six (6) sections as referenced below, organized by section number. The six (6) sections are:

- 1) Required Submittals - See Section 6 Below
- 2) Qualifications and Experience – See Section 7 Below
- 3) Approach to the Work – See Section 8 Below
- 4) Knowledge of Florida redevelopment statutes and Redevelopment Housing – See Section 9
- 5) Hourly Rate or Fee Schedule – See Section 10 Below
- 6) Other pertinent documents the Responder wishes to provide

6. REQUIRED DOCUMENTS TO BE SUBMITTED:

Letter of Transmittal: The cover letter shall be addressed to Carol Westmoreland, Executive Director of the FRA at the address in Section 14, and shall include at a minimum the following:

- a) Name of responding individual, partnership, company, or corporation.
- b) Statement that all terms and conditions of the RFP are understood and acknowledged by the undersigned.
- c) Location(s) of office(s) that will provide services to the FRA and the service area covered by the office.
- d) Signature(s) or representative(s) legally authorized to bind the Responder.

Responder Documents:

- a) Copy of any licenses or certifications that the Responder believes are pertinent.
- b) Resume(s) of key personnel who would be working with the Certification Committee and the FRA.
- c) **Pertinent** business references.

Corporate Information: If a Responder is a corporation, it must be registered with the Florida Secretary of State and be a corporation in good standing.

Responder's Certifications: See Attachment A included in this package.

Taxpayer Identification Number (W-9 Form): See Attachment B included in this package.

7. QUALIFICATIONS AND EXPERIENCE

- a) The Responder or key personnel who have been detailed to this contract must have been in business at least three (3) years and must provide documentation of work experience through references or products, related to the focus of this RFP.
- b) The Responder must provide details of qualifications of the specific individuals who will be providing the services, including certifications, resumes, and contact information.
- c) Please identify the role(s) that assigned individuals shall assume in the proposed contract with the FRA.
- d) Discuss the Responder's ability and capacity to perform the necessary project activities in a timely manner.

- e) Discuss the Responder's experience in teaching and training redevelopment professionals in Florida. If evaluations of prior teaching experience are available, please include them.

8. APPROACH TO THE WORK

- a) The Responder shall provide an approach to the requested services based on the Scope of Work.
- b) It is desirable for the Responder to, when applicable; include any innovative approaches, cost savings ideas and methods, and any other information considered by the Responder to be advantageous to demonstrate an understanding of the required services.

9. KNOWLEDGE OF FLORIDA REDEVELOPMENT STATUTES AND HOUSING REDEVELOPMENT PROCESSES

- a) Provide a list of redevelopment or housing projects in Florida in which the Responder has been involved within the past five years.
- b) Provide a description of the Responder's knowledge and involvement in planning, organizing, implementing, and closing out housing redevelopment projects in Florida.

10. HOURLY RATE OR FEE SCHEDULE

Provide the Responder's hourly rates, fees, and/or commissions for each category of services you propose to provide. FRA expects to enter into a fixed price contract so a total cost must also be provided. If the cost of services varies by staff member or job position, provide cost by staff name or position name. **If a Responder desires to teach the module to FRA members on an on-going basis, provide those costs separately.**

11. EVALUATION PROCESS

The FRA will appoint a selection committee to evaluate responses and to rank the Responders. The FRA shall be the sole judge of its own best interests, the responses, and the resulting agreement. A ranked short list may be presented to the FRA Board for approval or the selection committee may choose to recommend one or more respondents. Award(s) will be made to the Responder(s) who presents the best value to the FRA based on the entire evaluation process and all the information gathered. Evaluation factors are based on the abilities of the Responder to efficiently perform the Scope of Work, and the information obtained from the responses to this Request for Proposal.

A selected group of Responders *may* be required to make an oral presentation to the selection committee. Such presentation will provide an opportunity for each short listed Responder to clarify the information provided in their RFP. Oral presentations, if any, will be considered in conjunction with submitted data by the Selection Committee. The Selection Committee will present its recommendation to the FRA Board, which has the authority to make the final determination and award contracts.

Responses will be evaluated on a total score basis, with a maximum score of one hundred (100) points. If a member of the FRA and a non-member of the FRA are tied in the evaluation, the FRA

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member will be given preference.

12. EVALUATION METHODOLOGY

a) Qualifications of the Firm / Individual(s) (0 to 30 points)

- Certifications and resumes of assigned individuals and their duties in the development of the materials.
- List of relevant housing projects, qualifications and experience that the Responder has, or has completed within the past three (3) years.
- References and contact information

b) Approach to Work (0 to 10 points)

Review of the Responder's proposed approach to the development of the training module as outlined in the Scope of Work, the Responder's understanding of the Scope of Work, and any unique concepts or cost saving suggestions. Also the Responder's staffing quality and availability. Evaluate the Responder's communication ability, commitment to satisfying the FRA's needs, and the Responder's past performance on similar projects.

c) Knowledge of the Florida Redevelopment Statutes and Processes (0 to 20 points)

Review of the documentation relating to the Responders offices and staff. Consideration of the number and types of local projects and redevelopment services provided or conducted by the Responder in the past three years. Particular emphasis will be placed on key personnel's involvement and experience with local CRA's and housing projects undertaken by those CRA's.

e) Ability and Experience in Training for Professional Organizations (0 to 25 points)

Review Responder's experience in creating and providing training material for professional organizations or its own staff. Educational institutions should discuss their work in creating training programs for other organizations. If the Responder is proposing to teach as well as create the module, emphasis on experience in providing training should be included here.

d) Hourly Rate Fee Schedule (0 to 15 points)

Review of the proposed Hourly Rate / Fee Schedule for the duration of this agreement.

Responders may include any documentation that they believe will enhance the reviewer's understanding of the Responder's qualifications and experience to fulfill the Scope of Services. It is the FRA's desire to secure the most qualified entity available and any documentation that provides the reviewers with a better insight into the Responder is welcome.

The responses will be evaluated on

- a) **Strengths:** Those areas in which the response exceeds the FRA's minimum requirements.
- b) **Weaknesses:** Those areas where the response lack soundness or understanding of the Scope of Work.
- c) **Deficiencies:** Those areas where the response fails to meet the RFP requirements.

13. SUBMISSION OF DOCUMENTATION

One original, six copies of the bound documents, and one digital copy in PDF format on a CD or DVD must be delivered on or before 3:00 pm on November 14, 2014, to:

**Carol Westmoreland, Executive Director
Florida Redevelopment Association
301 S. Bronough Street, Suite 300
Tallahassee, FL 32302-1757**

All documents must be delivered to or received in the mail by the due date and time. Any documents received after this date and time will not be considered and will be returned to sender unopened.

14. QUESTIONS

All questions shall be submitted in writing and must be received before October 31, 2014. Questions may be submitted by email. Any such questions shall be submitted to:

**Carol Westmoreland, Executive Director
Florida Redevelopment Association
Post Office Box 1757
301 S. Bronough Street, Suite 300
Tallahassee, FL 32302-1757
(850) 701-3608 cwestmoreland@flcities.com**

15. LIABILITY

The FRA assumes no responsibility to any Responder for the cost of preparing this RFP or activities associated with the response. The FRA reserves the right to accept or reject any and all responses, to waive information, or to re-advertise as may be in the best interest of the FRA. The FRA will not accept any mail or delivery service that is late, and will return all late responses unopened. The Responder understands that this RFP does not constitute an agreement or a contract with the Responder. Neither the FRA nor its representatives shall be liable for any expenses incurred in connection with preparation of a response to this RFP. Responders should prepare their responses simply and economically, providing a straightforward and concise description of the Responder's ability to meet the requirements of the RFP.

16. AWARD

All responses will be evaluated by FRA in accordance with the criteria set forth in the RFP documents. The FRA may conduct interviews/presentations as part of the evaluation process from the short-

listed firms. The FRA anticipates award to the Responder or Responders judged by the FRA to be the most advantageous and offers the best value to the FRA. The FRA reserves the right to accept or reject any or all responses and to make the award to those Responders, who in the opinion of the FRA, will be in the best interest of and/or the most advantageous to the FRA. The FRA also reserves the right to reject the response of any Responder who has previously failed in the proper performance of an award or to deliver on time contracts of a similar nature or who, in the FRA's opinion, is not in a position to perform properly under this award. The FRA reserves the right to inspect all facilities of Responders in order to make a determination as to the foregoing. The FRA reserves the right to waive any irregularities, informalities, and technicalities and may at its discretion, conduct a re-procurement.

17. ACCURACY OF RESPONSE INFORMATION

Any Responder whose response to the FRA contains any information which is determined to be substantially or materially inaccurate, misleading, or exaggerated shall be disqualified.

18. MISTAKES IN RESPONSE

Responders are expected to examine the terms and conditions, specifications, delivery schedule, costs or fees, extensions and all instructions pertaining to supplies and services. Failure to do so will be at Responder's risk. In the event of extension error(s), the unit price will prevail and the Responder's total offer will be corrected accordingly. Written amounts shall take precedence over numerical amounts. In the event of addition errors(s), the unit price, and extension thereof, will prevail and the Responder's total offer will be corrected accordingly. Responses having erasures or corrections must be initialed in ink by the Responder.

ATTACHMENT A

RESPONDER'S CERTIFICATION

I have carefully examined the Request for Proposal, Instructions to Responders, General and/or Special Conditions, Specifications, and any other documents accompanying or made a part of this Request for Proposal.

I hereby propose to furnish the services specified in the Request for Proposal at the prices, rates or discounts quoted in my response. I agree that my response will remain firm for a period of up to one hundred fifty (150) days in order to allow the FRA adequate time to evaluate the responses.

I agree to abide by all conditions of this response and understand that a background investigation may be conducted by the FRA prior to award.

I certify that all information contained in this response is truthful to the best of my knowledge and belief. I further certify that I am duly authorized to submit this response on behalf of the Responder and that the Responder is ready, willing and able to perform if awarded the contract.

Responder

Authorized Signature

Officer Title

Date

THIS FORM MUST BE COMPLETED AND RETURNED WITH THE RESPONSE

ATTACHMENT B

Request for Taxpayer Identification Number and Certification (W-9 Form)

THIS FORM MUST BE COMPLETED AND RETURNED WITH THE RESPONSE

Form available at Internal Revenue Website

<http://www.irs.gov/pub/irs-pdf/fw9.pdf?portlet=3>

HOUSING AS A REDEVELOPEMENT TOOL

1. Glossary of Terms
2. Introduction - Defining the role of Housing in CRAs
 - A. History and Statutory requirements relative to Housing and Redevelopment Areas
 - B. Luxury and Market Rate Housing as a Redevelopment Tool
 - C. CRAs Unique Role in Affordable and Workforce Housing
 - D. Homeownership vs. rental
 - E. Demolition of Dilapidated Housing
 - F. Rehabilitation of Substandard Housing
 - G. Land Assemblage
3. Defining Housing Issues, Needs and Market Demand
 - A. Housing Needs Assessments and Market Analysis
 1. Customized studies and project driven market analysis
 2. Information sources:
 - a. SHIP Affordable Housing Plan
 - b. HUD Consolidated Plan
 - c. Housing Element – Comprehensive Plan
 - d. University of Florida, Shimberg Center data
 - B. Current Market Conditions, Economic Challenges and Market Opportunities – realities of demographics
4. Planning and Coordination for Affordable and Workforce Housing
 - A. Community stakeholders and strategic planning
 - B. Gentrification and displacement – price points for market segments
 - C. City, County, State requirements
 - D. Land Use – Zoning and other regulations
 - E. Land Development Regulations (LDR)
 - F. Working with Low Income Families to Qualify Them for Home Ownership
 - G. Creating and Operating a Land Trust
5. Working with Affordable, Workforce and Market-Rate Housing Developers
 - A. Nonprofit organizations and capacity issues
 - B. Recruiting and working with for profit developers
 - C. Achieving a balance of economic diversity
 - D. Homeownership versus rental development
 - E. Preservation issues including foreclosure opportunities
 - D. Density and transit-oriented development

- E. Mixed use development
 - F. Economic impact for community and CRA
 - G. Use of incentives to developer or ultimate homeowner
 - H. Self-help based non-profits such as Habitat for Humanity (Peter 5/15)
6. Resources and Gap-filling Subsidies and Incentives
- A. Financial Institutions and Community Reinvestment Act responsibilities
 - B. Low-income housing tax credits
 - C. Community Development Block Grants, HOME, Neighborhood Stabilization Funds
 - D. State of Florida Sadowski funds: SHIP, SAIL
 - E. Housing finance agencies and bonds
 - F. Working with other partners, national intermediaries, Federal Home Loan Bank of Atlanta, secondary market institutions, foundations
 - G. County programs
 - H. Inclusionary zoning and linkage fees
 - I. Increment Revenue
 - J. Density Variances and Bonuses
7. Housing Program Basics
- A. Establish extensive policies and procedures
 - B. Establish relationship with local lending institutions
 - C. Establishing and documenting household eligibility
 - D. Establishing lending and grant determinations
 - E. Issuing commitments to homeowners, developers, lenders
 - F. Predevelopment vs. construction financing vs. permanent financing
 - G. Prequalification of contractors
 - H. Lead- based paint and asbestos requirements
 - I. Understanding the cycle of real estate and housing development
8. Housing Rehabilitation Process
- A. Verification of ownership, eligibility, and (if necessary) borrowing ability
 - B. Completing work write-up and cost estimates (video the process)
 - C. Bidding process and contractor walk-through
 - D. Temporary relocation process (if required)
 - E. Selecting the contractor and execution of the contracts with homeowner and contractor
 - F. Promissory note and mortgage recordation
 - G. Notice to proceed
 - H. Interim inspections and payments
 - I. Dealing with change orders
 - J. Final inspection process (video)
 - K. Release of Liens

- L. Homeowner warranty
 - M. Final payment to contractor
 - N. Follow up with homeowner before the warranty expires
 - O. What to do When Things go Bad with the Rehabilitation Process
9. Acquisition of Dilapidated Housing and Land Assemblage
- A. Scattered Site versus Land Assemblage
 - B. Creating a Plan and Establishing Procedures
 - C. Working with a Professional Realtor
 - D. Dealing with Owners and Making Offers
 - E. Buying from County List of Lands
 - F. Seeking Donations of County-Owned Land
 - G. Buying Tax Certificates
 - H. Redeeming Tax Certificates and Tax Deed Sales
 - I. Acquiring as Part of a Probate Process
 - J. Acquiring from Bankruptcy Court
 - K. Displacement of Tenants and Relocation of Owners
 - L. Chapter 163 Implications of Disposal of CRA Owned Property
10. Demolition of Dilapidated Housing
- A. Demolition Considerations (asbestos, lead paint, etc)
 - B. Acquisition for Demolition
 - C. Using Unsafe Structure Board Process
 - D. Choosing Between Demolition Contractors, Local Public Works, or Even the Fire Department
 - E. Maintaining Structures between Time of Acquisition and Demolition
 - F. Post-Demolition Maintenance Issues
11. New Housing Construction
- A. Why are CRA's Involved in New Housing Construction
 - B. Assessing CRA Capacity and Constraints
 - C. Selecting Professionals and/or Non-profits to Help with the Process
 - D. Treat the CRA as one of the Banks, not a Social Service Agency
 - E. Coordinating with Lenders
 - F. Property Donation vs. Forgiveness Loan, vs, "Retail" sale of CRA-owned Land
 - G. How to Secure the CRA's Position during Construction and at Closing
 - H. Future Subordination Issues
 - I. Dealing with Future Releases of Mortgages