

CITY OF OLDSMAR, FLORIDA

REQUEST FOR PROPOSALS



**Downtown Redevelopment –
Town Center/City Hall Site**

ISSUE DATE: April 2, 2024

REGISTRATION FOR PRE-PROPOSAL MEETING:
Monday, April 15, 2024
2:00 PM EST

PRE-PROPOSAL MEETING: Tuesday, April 16, 2024
10:00 AM EST

PROPOSALS DUE: Monday, June 17, 2024
2:00 PM EST

PUBLIC OPEN HOUSE: TBD

SUBMIT TO: City of Oldsmar
100 State Street West
Oldsmar, Florida 34677-3655

1.0 Introduction and Objectives

This is a formal Request for Proposals (“RFP”) being issued to any firm or group of firms able to act in planning and development capacity to implement a mixed-use project on approximately 8.0 acres of “Property” or “Subject Site” owned by the City of Oldsmar (“City”) in downtown Oldsmar adjacent to Tampa Road. The City’s intent is to make this property available on a fee simple basis to the selected party(ies) able to advance a project deemed to activate this highly visible and centralized location in the community.

This site represents the City’s effort to create an identifiable downtown area and has a long history of community engagement. The mission is to develop the site through exemplary planning and public support to generate an aesthetically pleasing, economically sustainable, iconic Town Center destination enjoyed by residents, customers, and visitors through a variety of experiences and places. The approved vision is that Oldsmar’s Town Center will be a special place that deepens the community’s identity, acknowledging its historic character while sensitively incorporating a contemporary mix of residential, commercial, civic, and public open space uses. It will be a place that connects people within an aesthetically exciting destination for young and old alike while providing new economic opportunity for Oldsmar.

While all of the details and procedures should be reasonably clear, all interested parties should be aware that participation in the later described virtual pre-proposal meeting is mandatory. Procedures, submission material, necessary forms, and other information are described below.

For those that will be making submissions, a number of specific documents and required forms must accompany each proposal. These documents and/or forms may be found on the City’s SharePoint Site. Contact downtown@myoldsmar.com to request access. Informational documents and required forms to be found on the SharePoint site include but are not limited to the following:

- Required Forms as listed under Section 12.0
- Site map
- Parcel map
- Vision and mission statement
- Detailed criteria and weighting schema
- Regulatory references including, but not limited to, Town Center Code and Architectural Design and Pattern Book
- Site reports including past environmental and transportation assessments
- Sample development agreement
- Sample contract for sale

Under the terms of this RFP, the City is offering these holdings (“Property” or “Subject Site”) for purchase. The Property is currently anchored by the existing Oldsmar City Hall. Upon acquisition by the successful parties, the City expects the Property to be cleared of all structures, including the Oldsmar City Hall, that may impede the Property’s optimal planning and development. As to the particular use of the Subject Site, the City anticipates development and operation of a mixed use or multi-use project (“Project”) that will energize this key location in the community.

A fee simple sale of this Property has been anticipated for several years, following a period of assemblage and changes to the regulatory guidelines identifying allowable uses and specifying general densities or intensities and potential adjustments to those densities or intensities. Following the successful implementation of another City sponsored project near the existing library, the community’s elected leadership committed to soliciting detailed proposals for the Subject Site addressing concept, approach, specific skills, experiences, and capacity to acquire and then complete a Project consistent with the City’s vision. In separate sealed envelope provided to the City, those submitting proposals would also specify a purchase price offer for this Property.

Generally, the process foresees those receiving this RFP will provide information or narratives about concepts, 2

plans, and capabilities to implement a proposed Project. More particularly, this RFP identifies or clarifies the City's expectations about uses, scale of those uses, public space, timing, removal of Oldsmar City Hall as an impediment to the best plan, matching of capabilities to describe discrete roles or responsibilities of those involved, requirements to showcase any plans publicly, separate sealed purchase price offers, criteria by which the preceding will be treated or evaluated including minimum required responses or information, and a schedule for the City to meet its formal selection process, including multiple opportunities for potential respondents to seek answers to questions or concerns not addressed herein from the City. The City believes an open and continuing dialogue is essential for all parties to achieve their respective goals.

The sale of the Property comprises the core of what is being offered by the City, subject to other criteria or specifications described in the RFP. Concepts described by a prospective proposer must be financially self-sufficient and financially feasible within the limits supported by a purchase price offer for the Property, presumed commensurate with the plans described. The City discourages requests for additional incentives, financial or economic inducements, credits, or waiving of any normal charges or fees that might not be absorbed in the value of the underlying real property.

The City is open to alternative methods of satisfying normal parking requirements through a shared parking strategy in accordance with the approach and methodology defined by the Urban Land Institute ("ULI"). Alternative standards for parking counts are encouraged with the understanding that, if selected, proposers will be required to document their strategy following practices outlined by ULI as part of a subsequent formal site planning/development review process. If reduced parking needs can be documented, a thoughtful approach may reduce development/construction costs, ongoing operation and maintenance costs, as well as afford opportunity for additional site design strategies.

Given the public nature of this process and any proposals received, there are several disclosures and forms that must be executed to satisfy this process, Florida law, and City Ordinances. Among these documents or forms, are forms acknowledging that the party signing the Cover Letter-

- 1) has read this RFP in its entirety,
- 2) must attend themselves, or have an authorized agent on their behalf attend, the virtual pre-proposal meeting as a condition of submitting a proposal,
- 3) has required all the entities that are a part of the team to read the RFP in its entirety,
- 4) understand that any failure to comply is reason for disqualification at the City's option,
- 5) assumes all risks explicit or implicit in this process as outlined,
- 6) the undersigned is able to commit other parties identified in the response to the RFP to their responsibilities and roles, assuming overall responsibility to fulfill the obligations of its proposal in its entirety, and
- 7) agrees to conform to the terms of the City's sales contract and development agreement.

2.0 Overview of Process

Proposals and related materials will be delivered to the City no later than **2:00pm EST – Monday, June 17, 2024.**

Each proposal will be evaluated against three broad measures: the plan itself, the technical capability(ies) of the team to implement the plan proposed, and the purchase price offered to the City. More detailed criteria comprise each of these which roll up to a score for the broader measure. The materials and information provided in response to this RFP should be sufficiently amplified that their purpose and meaning are clear and definitive as to intent and function. A mandatory virtual pre-proposal meeting allows potential respondents to obtain clarification of the RFP requirements and to address any further questions or issues. The person(s) who will be signing the proposal must be the same party present and attending the mandatory virtual pre-proposal meeting or have an authorized agent present and attending on their behalf.

Information regarding the plan and the team will be available to all members of the reviewing staff and elected officials while details of Financial Consideration (purchase price and offer) will not be available until the plans and technical capability(ies) of the teams have been evaluated. The Financial Consideration (purchase price) is evaluated independently through a separate scoring process by City Council. Personnel from GAI Consultants, Inc. (“GAI”) have a very discrete and limited role in the review process. GAI personnel are retained *only to review and comment* on aspects of the plan and the capability(ies) of the teams involved. GAI personnel *will assign no scores*. All scoring remains the exclusive responsibility of the City Council.

In the event the City should receive more than ten (10) proposals, the City Council alone will create a shortlist of their preferred submissions. In the event the City receives seven (7) or fewer proposals, there will not be a shortlist and all proposals will be evaluated and scored. In the event that the City receives more than seven (7) proposals, but not more than ten (10) proposals, the City Council reserves the right to create a shortlist of preferred submissions or waive the right to shortlist. If a shortlist is necessary, City Council alone will create the shortlist of the preferred submissions. Once proposals are received or once a shortlist is established, the shortlisted proposers, or all proposers if appropriate, will be required to attend and engage in a trade-show style open house which will be scheduled to occur approximately 30-days after proposals are received or 30-days after the shortlist is announced, whichever is appropriate. The open house will be held in Oldsmar, Florida at the City of Oldsmar’s Public Library (400 St. Petersburg Drive, Oldsmar, FL 34677) and provides an opportunity to interact informally with the public and members of the City Council that may be present. Members of the public attending the open house may interact with proposers, leave comment cards, and ask questions. As part of its expected review role, GAI will assemble and interpret any comments that may be received at an open house.

Formal evaluation and scoring of proposals will occur at a special meeting of the City Council. During this special meeting, the City Council will host formal presentations and interviews. The presentations and interviews will allow proposers to amplify and explain details of any issues, plans, or proposals and may address or expand upon comments or feedback which they received from the public during the open house. City Council will then officially score and rank each proposal.

3.0 Anticipated Schedule and Major Milestones

The City has the option of altering the schedule options but believes a reasonable sequence of actionable dates is as shown below. There are two schedules presented below (Option A and Option B). The option will be selected by the City Council based on the number of proposals received in accordance with Section 2.0 above.

Schedule Option A: Shortlist Required

1. **April 2, 2024:** RFP published by City
2. **April 16, 2024 – 10:00am EST:** City hosts a mandatory virtual pre-proposal meeting.
 - Registration for participation in the pre-proposal meeting required no later than **2:00pm EST on Monday, April 15, 2024** via email to downtown@myoldsmar.com.
 - Questions may be submitted to downtown@myoldsmar.com. Any questions received by 5:00 pm EST April 12, 2024, will be read aloud and answered during the mandatory virtual pre-proposal meeting.
3. Questions after the mandatory virtual pre-proposal meeting may be submitted to downtown@myoldsmar.com, and will be accepted until 5:00pm EST — May 10, 2024. Answers to questions will be provided no later than 5:00pm EST – May 17, 2024. All questions and answers will be copied to all potential respondents.
4. **June 17, 2024 – 2:00pm EST (Monday):** Proposals due. Proposal package shall be delivered to Oldsmar City Hall, c/o City Manager Felicia Donnelly, 100 State St W, Oldsmar, FL 34677, and must be stamped received by the above indicated time. Proposal package must include:
 - 1 printed proposal marked “original” with all original signatures and seals as appropriate,
 - 10-printed copies of complete proposal,
 - 1-copy of complete proposal in PDF format on USB drive, and
 - Financial Consideration (purchase price) must be provided in a “Separate Sealed Envelope” clearly marked “Price Proposal.

5. **July 16, 2024:** Shortlist Announced
6. **August 14, 2024:** Open House (trade-show style) will be held at the City of Oldsmar Public Library, 400 St. Petersburg Drive, Oldsmar, FL 34677. Proposers will display their proposed projects in a trade show format for public participants. Members of the public will have a chance to visit with each proposer and provide feedback via comment cards or their equivalent.
7. GAI will review and provide comments on each proposal, including elements of the proposals specific to the Detailed Criteria and Weighting Schema and feedback from the public Open House.
8. **September 14, 2024:** Formal Interviews and Evaluation. There will be a Special Meeting of the City Council to allow formal presentations from each proposer, for the City Council to conduct proposer interviews, and for the City Council to ask specific questions of either GAI or the proposers. Once completed, the City Council will score each proposal based upon the established Detailed Criteria and Weighting Schema matrix. After all proposals are scored, the separate sealed envelopes containing the Financial Consideration (purchase price) offer will be opened.
 - During the Special Meeting, the Financial Consideration (purchase price) component will be scored objectively based on a pre-determined scale with the highest purchase price receiving the highest score. The purchase price component from all other proposals will receive a proportionate score. The City's Purchasing Division will be available to enter the individual City Council scoring sheets, enter the purchase price proposals, and provide results in the form of ranking based on total weighted scores at the Special Meeting.
 - If desired, the City Council will approve the ranking, and subsequently, direct the City Manager to proceed with requesting confirmation from highest ranking proposer that they wish to proceed to negotiations, and request for verification of financial capacity of the highest ranked firm.
9. **September 17, 2024:** During a regularly scheduled City Council meeting, the City Council will consider authorizing the City Manager to begin negotiations of a Development Agreement in accordance with the City's Land Development Code Section 14.7.
10. Within four (4) weeks of being notified of the first-place ranking, initial deposits will be payable and placed in escrow with the City Attorney's office. Other initial deposit checks submitted will be returned to the other proposers.

Schedule Option B: Shortlist NOT Required

1. **April 2, 2024:** RFP published by City
2. **April 16, 2024 – 10:00am EST:** City hosts a mandatory virtual pre-proposal meeting.
 - Registration for participation in the mandatory virtual pre-proposal meeting required no later than 2:00pm EST on Monday, April 15, 2024 via email to downtown@myoldsmar.com.
 - Questions may be submitted to downtown@myoldsmar.com. Any questions received by 5:00pm EST April 12, 2024, will be read aloud and answered during the mandatory virtual pre-proposal meeting.
3. Questions after the mandatory virtual pre-proposal meeting may be submitted to downtown@myoldsmar.com, and will be accepted until 5:00pm EST — May 10, 2024. Answers to questions will be provided no later than 5:00pm EST – May 17, 2024. All questions and answers will be copied to all potential respondents.
4. **June 17, 2024 – 2:00pm EST, Monday:** Proposals due. Proposal package shall be delivered to Oldsmar City Hall, c/o City Manager Felicia Donnelly, 100 State St W, Oldsmar, FL 34677, and must be stamped received by the above indicated time. Proposal package must include:
 - 1 printed proposal marked "original" with all original signatures and seals as appropriate,
 - 10-printed copies of complete proposal,
 - 1-copy of complete proposal in PDF format on USB drive, and
 - Financial Consideration (purchase price) must be provided in a "Separate Sealed Envelope"

clearly marked "Price Proposal.

5. **July 17, 2024:** Open House (trade-show style) will be held at the City of Oldsmar Public Library, 400 St. Petersburg Drive, Oldsmar, FL 34677. Proposers will display their proposed projects in a trade show format for public participants. Members of the public will have a chance to visit with each proposer and provide feedback via comment cards or their equivalent.
6. GAI will review and provide comments on each proposal, including elements of the proposals specific to the Detailed Criteria and Weighting Schema criteria and feedback from the public Open House.
7. **August 17, 2024:** Formal Interviews and Evaluation. There will be a Special Meeting of the City Council to allow formal presentations from each proposer, for the City Council to conduct proposer interviews, and for the City Council to ask specific questions of either GAI or the proposers. Once completed, the City Council will score each proposal based upon the established Detailed Criteria and Weighting Schema matrix. After all proposals are scored, the separate sealed envelopes containing the Financial Consideration (purchase price) offer will be opened.
 - During the Special Meeting, the Financial Consideration (purchase price) component will be scored objectively based on a pre-determined scale with the highest purchase price receiving the highest score. The purchase price component from all other proposals will receive a proportionate score. The City's Purchasing Division will be available to enter the individual City Council scoring sheets, enter the purchase price proposals, and provide results in the form of ranking based on total weighted scores at the Special Meeting.
 - If desired, the City Council will approve the ranking, and subsequently, direct the City Manager to proceed with requesting confirmation from highest ranking proposer that they wish to proceed to negotiations, and request for verification of financial capacity of the highest ranked firm.
8. **August 27, 2024:** During a regularly scheduled City Council meeting, the City Council will consider authorizing the City Manager to begin negotiations of a Development Agreement in accordance with the City's Land Development Code Section 14.7.
9. Within four (4) weeks of being notified of the first-place ranking, initial deposits will be payable and placed in escrow with the City Attorney's office. Other initial deposit checks submitted will be returned to the other proposers.

4.0 Mandatory Virtual Pre-Proposal Meeting

While requirements of the submission are outlined in detail, questions, interpretation of requirements, and issues may remain. The City has determined that the respective interests of the City and all responders is best served by having the proposer or an authorized agent/representative of the proposer attend a mandatory virtual pre-proposal meeting. Each firm or team must register the individual authorized to represent the firm and/or team in the mandatory virtual pre-proposal meeting no later than **2:00pm EST on Monday, April 15, 2024** via email to downtown@myoldsmar.com. This deadline assures that the person has technical access and can attend the meeting.

The party in attendance *must be either* the person who will be signing the submittal documents and assuming responsibility for the proposing party *or* an authorized agent / representative designated and registered to attend the mandatory virtual pre-proposal meeting. The designation and registration will be via email to downtown@myoldsmar.com.

5.0 Land or Parcels Available

Because the deferred maintenance costs of Oldsmar City Hall appear to exceed any benefit in retaining the structure, the City has opted to relocate its administrative activities to another location(s). Although no specific decisions have been made about the relocation, for purposes of responding to this proposal, all 8 acres of the Property, including all rights of way and any portions the Property where Oldsmar City Hall is sited, must be incorporated into any proposed plan.

The City wants to maximize the value of the Property and does not want the existing Oldsmar City Hall building to limit the most financially rewarding and visionary plan and strategy. Toward those ends, any plans and proposals being prepared shall not consider or contemplate that Oldsmar City Hall itself will be relocated or retained on the Property or that the City will become a tenant or user within a larger project that might be implemented. While the City being a tenant in the proposed project could be a possibility, it should not be considered a part of any proposed implementation approach or relied upon for project feasibility. It is further the City's expectation that the successful proposer will take action to remove Oldsmar City Hall within a mutually agreed upon timeframe to be defined in the development agreement discussed further in the RFP.

6.0 Applicable Regulations or Controls

From a planning and regulatory standpoint, the ordinances or controls on the Property can accommodate a combination of residential, hospitality, and other non-residential uses subject to satisfying open space, parking, and amenities at varying intensities or densities set out in the City's Land Development Code. Code requirements for parking notwithstanding, the City is open to alternative methods of satisfying normal parking requirements through a shared parking strategy in accordance with the approach and methodology defined by the Urban Land Institute ("ULI"). Alternative standards for parking counts are encouraged with the understanding that, if selected, proposers will be required to document their strategy following practices outlined by ULI as part of a subsequent formal site planning/development review process.

While minor design exceptions may be considered in the negotiation process and subsequent development agreement, there will be no consideration for increased unit density or intensity other than allowed by the City's Code and density bonus provisions.

The City Council specifically agreed that proposers should determine what combination of uses and activities would comprise the most beneficial plan. It remains the responsibility of each proposer to evaluate how their approach and team will satisfy regulatory compliance.

A development agreement will ultimately codify the potential entitlements or opportunities and other controlling terms. It is expected that the selected party will coordinate or balance both investment needs and civic goals of the broader community by working closely with key City staff.

7.0 Pending Litigation.

The City ordinances adopted in 2022 which amended the Comprehensive Plan and Town Center Development Code to encourage mixed-use development and provide density incentives in the Community Redevelopment District are the subject of litigation brought by two residents against the City of Oldsmar. The residents allege that the ordinances were adopted in violation of Florida's Sunshine Law. The trial court issued Summary Judgment in favor of the City in March 2024. The residents recently filed a Notice of Appeal of that trial court decision. Proposers should be aware of what the Comprehensive Plan and Town Center Development Code allow in the current version as well as the prior version (before amendment by the ordinances referenced above).

8.0 The Community Vision

The public has been engaged in preparing a mission and vision for this Property. That mission and vision was prepared in the Fall of 2022. City staff and leadership remain committed to that vision and the elements which were captured in the accompanying narrative. In sum, the ideas assembled in that vision evoke a strong sense of place, a venue for public gathering, a mix of uses, and distinctive design features. Obviously, certain elements are more subjective than others, but a number of characteristics have been assigned weights for evaluation purposes in the Detailed Criteria and Weighting Schema matrix which each respondent should consider and address.

In addition to the mission and vision, you will find community values, goals, and objectives as it relates to this project.

The Community Visioning Workshop can be viewed here: <https://www.youtube.com/watch?v=JRdEqzvT06Y&t=1s>

9.0 Continued Public Participation and Open House

Because the public has expressed strong support for the vision described above, the City wants its residents to be further involved in the selection process by experiencing an open house where the proposers will have a chance to meet interested parties, field questions, and identify issues that might be addressed in further discussion with the City Council as part of the formal interview and selection process that will follow. The planned open house is an opportunity to interact with the public in a less structured, one-on-one, way as a prelude to more formal discussions and presentations with elected officials.

For the open house, each proposer will bring larger format plans, boards, and information that can be easily showcased and explained. Proposers are discouraged from showcasing any plans that reflect departure from or inconsistency with their proposal as the materials showcased will not be considered during the evaluation process.

10.0 Plan: Details of the Submission Requirements for Proposed Concept

Although a proposer's plan and proposal will be offered as a concept, subject to refinements as negotiations continue, the scope of that concept must be detailed sufficiently to illustrate the overall intent, scale, its mixed-use components, vehicular and pedestrian accessibility, parking, and any other major site design considerations (i.e., stormwater management, solid waste container locations, etc.). While Detailed Criteria and Weighting Schema information can be found in the SharePoint site, the proposed plan and its various elements represent 56% of the total final scoring. This specific category is itself allocated among indicators or metrics associated with major aesthetic features, sense of place, and larger content or function.

Respondents *must provide at least the following* for the submission package addressing these matters:

- Brief narrative describing the concept plan and function, describing features of the plan that connect it to the City's vision and mission.
- Brief narrative describing how the plan demonstrates the specific items listed in the Detailed Criteria and Weighting Schema under the Categories of Appearance and Aesthetics (Character) and Experience (Sense of Place)
- Challenges to be addressed by the proposer or the City, if any, in terms of zoning, uses, access, parcellation, timing, and/or total concept and the way in which these issues might be further addressed via the submitted plan.
- Please note that Concept plans or information must include all lands available and must consider the Property as though Oldsmar City Hall were vacated and removed.
- Basic Illustrative Concept Plan including the following:
 - Space and site utilization identifying dimensions, structures, major access points, open space, circulation of interior roads and drives, areas subject to major landscaping, hardscaping, surface parking [counts], and garage parking [counts].
 - Sketches illustrating nature and character of public space, public facilities, and access.
 - Elevations of key structures clearly indicating intended features, height, and other dimensions demonstrating and meeting the Architectural and Design Pattern Book of the Town Center Code.
 - Summary of space utilization for the above expressed in terms of square feet ("SF") or acres as appropriate to estimate overall space function and activity or use, quantity of publicly accessible space and the mix and variety of uses or units to demonstrate the mixed-use intent of the City's objectives. This RFP has established that at least three uses be included in the plan and no single use represents less than 5% of total planned SF.
- Schedule by year, if required, for full plan implementation.
- In particular, the City understands any proposed Project will be a major financial undertaking and wants to evaluate concepts based on reasonably foreseeable costs and income as the basis of a plan's

complexity, stability or feasibility, quality, and general achievability. While the City is aware costs will likely change, initial representations provide insight into what might be achieved realistically in the context of broader market requirements imposed by rents, locational character or setting, and physical attributes of the Project.

As these relate to the plan components or features highlighted in the “Detailed Criteria and Weighting Schema”, the following are the minimum requirements to assist the City in its interpretation of proposals and its impacts on the community. Proposers are encouraged to amplify these details if they believe they are insufficient as outlined to convey the full fiscal or economic implications of a specific concept being proposed.

- Estimated costs of construction and development by phase sufficient in detail to distinguish construction costs allocated to structures and infrastructure and further specifying those costs for [1] major business and residential structures or spaces, and [2] parking spaces or facilities, as well as [3] additional professional fees, costs of financing, and other miscellaneous costs, all provided in terms of totals, \$/SF, \$/unit or other uniform metrics.
- Pro forma for first ten years sufficient in detail to consider: gross receipts from business spaces, residential rents or sale proceeds, management and operating costs and likely net operating income.

11.0 Technical: Details of the Submission Requirements for Proposer and Team Experience

As the City envisions the process, there is likely to be a team representing several disciplines or professionals organized or coordinated to achieve the plan described. One of the parties will have greater responsibilities or control than others. This RFP and your submission materials need to clearly distinguish the skills, experience, qualifications, and specific role of each team participant relative to what is being proposed. This combined and further clarified experience represent 36.8% of the total final scoring allocated between the respective roles of the proposer and the remainder of the team but also reflecting their experience at working together in some fashion previously.

Proposers *must provide at least the following* for the submission package reflecting the experience of the proposer and the related or supporting team:

- Within the team structure, a proposer or firm comprised of a single entity or person will be responsible for implementing and overseeing all stages and activities of any planned Project to include, but not limited to, affirming final due diligence as necessary, affirming purchase and negotiation details including any contracts or development agreements, finalizing timelines, overseeing regulatory obligations, overseeing final plans and specifications, securing funding and financing, finalizing construction agreements, assuring bonding and sureties, and generally managing the full planning, implementation, and construction of any proposed Project as well as assuring a structure for continuing property management.

A single point of contact will be available to the City to assure continuity and stability as the process begins and advances, this point of contact will remain unchanged unless mutually agreed upon by the City and proposer. Although the City rightly expects other parties to contribute to the various activities comprising the total development process, these activities will remain the primary responsibility of the party submitting and signing the proposal and offer for the Property.

Toward assuring those roles, the party identified as assuming this role should clearly and without ambiguity clarify the personal experience of this party following these guidelines:

- A. No more than two (2) resumes *associated with the persons who will represent the entity signing and submitting the proposal*. These two (2) resumes should consist of the Designated Representative or Entity (“DRE”) and/or the Project Manager (“PM”) who will be the point of continuing contact and interaction with the City for providing or executing subsequent information, contracts, or other agreements or disclosures

regardless of whether other team members occasionally contribute to any requirements.

Standard or generalized firm materials are strongly discouraged. The two resumes should be no longer than five (5) pages each and include at a minimum in this order:

- 1) Education and professional certifications.
- 2) Years of overall experience in similar project role with a narrative describing that role and the evolving or continuing career path.
- 3) Identify up to five (5) projects involving substantially similar concepts as that proposed *in which the person had a discrete leadership or management role*. The role and project should be described in detail addressing its similarity or implications to the proposed project in terms of location (city, state), scale, design, timeframes for planning, construction, and completion, means of funding and financing (amount of debt, sources of that debt, amount of equity and sources of that equity), activities and uses, complexities, status (complete, in leasing, under construction, being reviewed, other outcomes). If *none*, so state.
- 4) Identify up to five (5) projects involving that person or party *where that person or party interacted substantially on complex negotiations or partnerships or other associations with the public sector*. The person or party's role in these projects should be described in detail, identifying location and addressing the challenges of negotiations, the role of any Development Agreements or contracts, procedures for these activities, public expectations, and status (complete, in leasing, under construction, being reviewed, other outcomes). If in Florida, please indicate which jurisdiction and identify a knowledgeable public contact that the City may use as a possible reference. If *none*, so state.
- 5) Identify up to five (5) projects with similar estimated construction or total development costs in *which the person had a discrete leadership or management role describing the role scale, design, timeframes for planning, construction, and completion*, means of funding and financing (amount of debt, sources of that debt, amount of equity and sources of that equity), activities and uses, complexities, status (complete, in leasing, under construction, being reviewed, other outcomes). If *none*, so state.

It is understood that projects listed and described in each resume could potentially address *all of the qualities, knowledge, or skills* being requested in items 3-5 above, meaning a single project serves to demonstrate *all elements* of items 3-5 above. In this situation, the proposer should indicate that the specific project addresses *all elements* of items 3-5 above and describe the relevant experience. Otherwise, items 3-5 should be addressed individually by a series of separate and discrete projects satisfying each of the respective criteria.

- Supporting the proposer, it is anticipated there will be a team of architects, planners, engineers, attorneys, property management personnel or other professionals as appropriate. These professionals will have greater or lesser responsibility for aspects of any submission depending upon its focus and implementation. *The experiences of each, while important, should be distinguished from that of the proposer who will assume overarching responsibility of any proposed Project.*

Toward assuring those roles are meaningfully fulfilled, the party identified as assuming this role should clearly and without ambiguity clarify the personal experience of this party following the guidelines below. While it is absolutely not the City's intent to interfere in any contracting relationships between the DRE and firms or members of the DRE's team, the City assumes that the roles or associations represented in this submission are to be honored and maintained.

- A. No more than six (6) additional resumes *associated with any person who will be assisting the DRE or PM fulfilling key roles in design, planning, engineering, construction, or other professions* to advance the totality of the Project being proposed. These resumes should focus on *the discrete*

personal experience of that person not the firm's experience although that firm experience may be essential to that person's career development. *Alternatively, two (2) resumes* of the six (6) stipulated could focus on the firms where the various professionals may work.

At this stage, it is conjectural what kinds of professionals will comprise the essential skills and disciplines necessary to advance, implement, and manage any proposed plan. The disciplines or persons best represented by the additional resumes are entirely to the discretion of the DRE or PM.

Standard and generalized firm materials are strongly discouraged, including those that may be provided as an alternative. As to the requirements of those six (6) resumes, they should be no longer than three (3) pages each and should focus on the following information.

- 1) Education and professional certifications of the party identified [in the alternative, may apply only to firm certifications]
- 2) Years of overall experience in similar project role with a narrative describing that role and the evolving or continuing career or firm path.
- 3) Identify up to three (3) projects involving substantially similar concepts and scale as that proposed in which the party identified had a discrete leadership or management role that *will align with that expected in this project*. The role and project which should be described in detail with a narrative addressing its similarity or implications to that proposed in terms of location (city, state), scale, design, timeframes for planning, construction, and completion, estimated construction cost, activities and uses, complexities, status (complete, in leasing, under construction, being reviewed, other outcome) as appropriate to that party's role. If *none*, so state.
- 4) Identify up to three (3) projects involving that party where that party interacted substantially on complex negotiations or partnerships or other associations with the public sector and *aligns with the role expected in this project*. The party's role in these projects should be described in detail, identifying location, and addressing the challenges of negotiations, the role of any Developer Agreements or contracts, procedures for these activities, public expectations, status (complete, in leasing, under construction, being reviewed, other outcomes) as appropriate to that party's role. If in Florida, please indicate which jurisdiction and identify a knowledgeable public contact that the City may use as a possible reference. If *none*, so state.
- 5) Identify up to three (3) projects with similar estimated construction or total development costs in which the person had a discrete leadership or management role describing scale, design timeframes for planning, construction, and completion, estimated construction cost, activities and uses, complexities, status (complete, in leasing, under construction, being reviewed, other outcomes). If *none*, so state.

It is understood that projects listed and described in each resume could potentially address *all of the qualities, knowledge, or skills* being requested in items 3-5 above, meaning a single project could serve to demonstrate *all elements* of items 3-5 above. In this situation, the proposer should indicate that the specific project addresses *all elements* of items 3-5 above and describe the relevant experience. Otherwise, items 3-5 should be addressed individually by a series of separate and discrete projects satisfying each of the respective criteria.

- As the above emphasizes, there are certain shared experiences that are important. The City is expecting a single entity or person to assume overarching responsibility for any proposed project while relying on a technical team to support major implementation tasks or activities. The proposers must identify how this team, if at all, has functioned or worked together in prior assignments or projects, especially those associated with projects or activities involving or substantive reliance upon the public sector interaction beyond that stemming from normal procedural reviews or the approval of entitlements. Towards understanding how this team might work together to implement any proposed plan, the City requires the following:

- A. A detailed organization chart demonstrating the very explicit roles of all team members are identified and described. The chart should align with each of the resumes and responsibilities of the parties and firms provided.
- B. Identify and briefly describe up to three (3) projects involving substantially similar concepts when the parties identified and shown in the organization chart have functioned as a team in roles similar to those proposed. If specific team members have worked together, but not the entire team, those projects can be identified. If none, so state.

12.0 Required Forms

The following forms are required to be completed and submitted as part of the response to this RFP:

- 1) ACKNOWLEDGEMENT AND ACCEPTANCE, RFP
- 2) PUBLIC ENTITY CRIMES STATEMENT
- 3) CERTIFICATION OF NON-SEGREGATED FACILITIES
- 4) CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS
- 5) DRUG-FREE WORKPLACE
- 6) NON-COLLUSION AFFIDAVIT
- 7) STATEMENT OF NO BID
- 8) REFERENCES

13.0 Investigation and Litigation

If the Proposer has ever been the subject of an investigation conducted by a regulatory agency or professional licensing board, give the details and outcome of such action. If the Proposer has been sued within five years of the submittal date of the response to this RFP as a result of actions or inactions in the course of its business or profession, give the details and outcome of such suit(s) with your response to this RFP.

14.0 Financial Consideration (Purchase Price) Proposal, deposit, and submission requirements

The Financial Consideration (purchase price) that the proposer offers to pay for the Property will be provided in a separate sealed envelope to be disclosed publicly after all aspects of plans and team qualifications have been evaluated and scored by the City Council.

The Financial Consideration (purchase price) proposal represents 7.2% of the total final scoring.

That percentage will be added to the other scores associated with review of the plan itself and the team's experience and qualifications to deliver same. The highest purchase price proposal will receive the maximum allocation, and all other scores will be awarded a score proportionate to that score. Illustratively, should the highest purchase price be \$6,000,000 and the second highest purchase price be \$5,000,000, those proposals would be awarded scores of 7.2% [$\$6,000,000 / \$6,000,000 \times 7.2\% = 7.2\%$] and 6.0% [$\$5,000,000 / \$6,000,000 \times 7.2\% = 6.0\%$] respectively.

- The Financial Consideration (purchase price), expressed in dollars payable to the City, should be that sum the selected party would pay at closing for the Property, consistent with project concept, costs and incomes anticipated. The Financial Consideration (purchase price) must be one the proposer believes will sustain a feasible concept without reliance, reference, or dependence upon further discounts, waivers, or other contributions, direct or implied, by the City.
- Each proposal must include a \$100,000 deposit in the form of a certified check. The applicable sum should be made payable to the Trust Account of Trask Daigneault, L.L.P. (the City Attorney's law firm) deposit, and special terms, if any, will be provided in a separate, sealed envelope clearly identified as "Price Proposal".
- Each proposer understands and accepts that this Financial Consideration (purchase price) will be codified in a sales contract provided by the City, and subsequent closing of that transaction will be subject to the

negotiation of a development agreement (LDC 14.7), also provided by the City, consistent with plans, proposal and any representations made or submitted.

- Within four (4) weeks after interviews and the announced ranking, the deposit check of the first ranked proposal is payable, will be deposited, and held in escrow. It will be credited against the full purchase price paid at closing or various development fees or charges normally imposed unless that proposer formally withdraws for any reason before the end of those four (4) weeks.
- Should that proposer withdraw, at the City's option, lower ranked proposers may be given the opportunity to proceed in the place of the first ranked proposer subject to same financial obligations. In any case, all other undeposited checks of other proposals will be returned after four (4) weeks.
- Once the deposit is placed in escrow, there are other milestones and obligations that may impact the City's rights to retain the deposit funds.
 - The deposit is subject to return, at *proposer's* option, if City fails to provide a draft development agreement and form contract within 180-days of the date the initial deposit is secured.
 - The deposit will be forfeited by the proposer, at *City's option*, if all agreements are not executed by the proposer within 24-months of the date of the initial deposit is secured.
 - These dates or scheduled events can be modified by mutual agreement.

15.0 Credit, verification of references, and submission requirements

The City will engage in limited reference checks to evaluate some level of confidence that the first ranked submission has the adequate financial resources to close the transaction within 24-months from the date the initial deposit is secured.

To those ends, there are forms enclosed that allow the City to contact specific banking or financial institutions to discuss history and verify cash balances as of a date certain *following the ranking*. Such confirmation or procedures would be conducted by the City within four (4) weeks of being ranked as the preferred proposal.

It is presumed for the purposes of this RFP, that any proposal submitted will satisfy these nominal reporting obligations or can provide an adequate response to any exceptions raised by the end of week five (5).

If the highest ranked proposer does not satisfy the City's initial reference evaluations or fails to respond, the City may at its option determine the deposit is forfeited to the City without regard to other favorable aspects of the proposal.

16.0 Post submittal

To reaffirm procedures, the City intends to negotiate in good faith a final contract for purchase of the Property and development agreement with the party submitting the highest ranked proposal. The City retains the option of conducting the same business practices with the next ranked proposal with dates or weeks adjusted to specific circumstances which may have caused the higher ranked submission to be withdrawn or be invalidated. The basic terms of City Code of Ordinances Land Development Code 14.7 Development Agreements describe the specific procedures the City imposes for its negotiations and development agreement process.

The City also requires the following minimum, but not limited to, development agreement terms to be included:

1. A Performance Bond issued by a surety approved by the City in the amount of the Cost of Improvements.
2. Payment of all applicable Permit and Impact Fees.
3. Construction, landscaping, and maintenance of Public Space, including within the City's right-of-way along adjacent corridors.

4. Provision of access and maintenance easements as required for public utilities.
5. Relocation of any necessary infrastructure including utilities and fiber as necessary to construct this project in a manner that will provide continual service.
6. Performance of all site due diligence, including, but not limited to, any additional surveys and environmental assessments.
7. Replat of the existing parcels of land.
8. All site work, including but not limited to, the demolition or relocation of existing structures.
9. Buy-in into the City's stormwater system as necessary.
10. Connect the project to the City's reclaimed water system.
11. Submission of a final site plan, including a signage and landscape plan, through the City's formal review process.
12. Obtain all required permits.
13. Demonstration of concurrency, and submission of a concurrency test statement as required by the City's Land Development Code.
14. Demonstration of compliance to the Town Center Code, including, but not limited to the Architectural Design and Pattern Book.

17.0 Organization of proposal documents

To assure proposals maximize their benefits and key details are conveyed, the City requires proposals follow this basic format, consistent with the informational content and sequence addressed in the body of this RFP. Reasonable consideration should be exercised in terms of how visually and textually information is prepared. Major text should be nothing smaller than 10-point font except where it may appear in diagrams or graphic materials.

- A. Cover letter [Guideline: no more than 2 pages]
- B. Plan detail, Section 9.0 [Guideline: no more than 40 pages] (56% of Detailed Criteria and Weighting Schema)
- C. Technical capability(ies), Section 10.0 [Guideline: no more than 70 pages] (36.8% of Detailed Criteria and Weighting Schema)
- D. Financial Consideration (purchase price) proposal, Section 13, [No more than 1 page] (7.2% of Detailed Criteria and Weighting Schema)

TOTAL OF MAIN SUBMISSION (items A-D above): No more than 125 pages

- E. Additional forms or attest functions.