



Islamorada, Village of Islands, Florida

**REQUEST FOR QUALIFICATIONS FOR HOUSING DEVELOPMENT SERVICES
FOR AFFORDABLE AND EMPLOYEE WORKFORCES HOUSING AT ONE (1)
SPECIFIED AND UNSPECIFIED FUTURE LOCATIONS WITHIN
ISLAMORADA, FLORIDA
(RFQ-18-05)**

Issue Date: January 24, 2018

Islamorada, Village of Islands (the "Village") invites developers (individuals, entities, joint ventures or teams, for profit or not for profit) with qualifications and experience to respond to this Request For Qualifications ("RFQ" or "RFQ 17-09" for Housing Development Services). The successful respondent(s) (the "Developer") will be listed as qualified to work with the Village to develop, construct and operate affordable and/or employee workforce housing which will be made available for sale and/or rental with restricted rental rates to residents of Monroe County whose gross incomes range from 50% to 140% of the county's median income, depending upon the final approved proposals. It is anticipated that the Village may qualify one or more developers, based upon their respective experience and capabilities, to provide different types of housing services (e.g. "single lot" development and/or "multi-family community development"). It is also intended that with respect to the one (1) specified location set forth in this RFQ, the Developer's ability to provide rental housing may be favored or even deemed essential by the Village. An evaluation team of Village employees will rank the responses and make recommendations to the Islamorada Village Council.

The Village will receive formal Proposals for this RFQ until **3:00 p.m. on March 9, 2018**. Attached to this Request for Qualifications is a "Qualification Submission Document." Responses are to be made by completing this form in its entirety. Proposal Packages will be opened by the Village Clerk or her designee immediately following the closing of the RFQ.

Interested firms must submit sealed Proposal packages by certified mail or in person to:

Islamorada, Village of Islands
Attn: Village Clerk
86800 Overseas Highway
Islamorada, Florida 33036

It is the sole responsibility of the firm to ensure that their submittal is received in a timely manner. Any Proposal package submitted past the deadline and/or submitted to other locations or offices shall be deemed non-responsive and will be rejected.

I. PURPOSE

Islamorada, Village of Islands (the "Village") invites developers (individuals, entities, joint ventures or teams, for profit or not for profit) with qualifications and experience to respond to this Request For Qualifications ("RFQ" or "RFQ 18-05" for Housing Development Services). The successful respondent(s) (the "Developer") will be listed as qualified to work with the Village to develop, construct and operate affordable and/or workforce housing which will be made available for sale and/or rental with restricted rental rates to residents of Monroe County whose gross incomes range from 50% to 140% of the county's median income, depending upon the final approved proposals. It is anticipated that the Village may qualify one or more developers, based upon their respective experience and capabilities, to provide different types of housing services (e.g. "single lot" development and/or "multi-family community development"). It is also intended that with respect to the one (1) specified location set forth in this RFQ, the Developer's ability to provide rental housing may be favored or even deemed essential by the Village. An evaluation team of Village employees will rank the responses and make recommendations to the Islamorada Village Council.

The Village declares its intent to negotiate, enter into agreements, leases and other ventures within the fullest extent of its authority and in the public interest, as it deems necessary in order to address critical housing needs throughout the Village, pursuant, but not limited to, authority set forth in Sections 166.04151, et seq., and 380.032, Florida Statutes. Moreover, Developers should be familiar with the Village's Comprehensive Plan and the Village's Code of Ordinances, including but not limited to Chapter 30 *Land Development Regulations* and Code Section 2-237(e) *Preference for Local Businesses*.

The purpose of this RFQ is to solicit sealed proposals from qualified affordable housing developers to construct and operate a new affordable single-family and multifamily housing which will be made available for sale and/or rental with restricted rental rates to residents of Monroe County whose gross incomes range between 50% to 140% of the county's median income. This RFQ complies with Section 255.20, Florida Statutes, Section 287.055, Florida's Consultant's Competitive Negotiation Act (CCNA), and the Village's adopted Policy for Selection of Design Build Operate Firms.

II. DESCRIPTION OF THE VILLAGE

The Village was incorporated as a municipality on December 31, 1997. Located in the Upper Florida Keys, the Village is approximately 18 linear miles in length with a land area of approximately 3,900 acres. The Village consists of four islands: Plantation Key, Windley Key, and Upper and Lower Matecumbe Keys, which are part of the Florida Keys' chain of islands. The Village boundaries extend from Mile Marker 90.939 to Mile Marker 72.658. The Village has an approximate population of 7,100.

III. PROJECT DESCRIPTION

The Village purchased four (4) vacant lots located on Woods Avenue in Plantation Key, Islamorada, Florida to develop into affordable housing. The Village seeks proposals that demonstrate an understanding of the

Village community and its housing needs and that would provide a high quality affordable housing development on the Project Site.

The Project Site will be offered “as is” to the selected Developer, who shall have full responsibility for obtaining all required approvals for the project, including environmental studies, site survey, environmental remediation, if needed, site preparation, permits, and any other predevelopment costs. It is anticipated that the Village may offer selected Developer(s) the opportunity to develop future sites that may be acquired by the Village for affordable housing.

IV. SCOPE OF SERVICES

A. Development Objectives

The Village seeks knowledgeable, financially sound and experienced providers of affordable housing that will meet the current and future needs of lower-income residents. Such providers would work with the Village to develop, construct and operate affordable and/or workforce housing which will be made available for sale and/or rental with restricted rental rates to residents of Monroe County whose gross incomes range from 50% to 140% of the county’s median income, depending upon the final approved proposals. For its specified Project Site set forth below, the Village desires to build a single apartment building comprised of eight (8) units: four (4) units with two (2) bedrooms each and the other four (4) units with one (1) bedroom each.

Site Description

The Project Site includes four (4) contiguous vacant lots of approximately 4800 SF on approximately 24,384.00 SF on Woods Avenue. See Attachment “A”

Legal Description

The Project Site is described as follows:

Lots 1, 2, 19 and 20, Square 1, Lake Harbor, according to the Plat thereof as recorded in Plat Book 4, Page 84, of the Public Records of Monroe County, Florida.

The Property Appraiser’s Parcel Identification Number is 00418090-000000; 00418100100-000000; 00418270-000000; and 00418280-000000.

The successful proposer shall confirm the exact site areas(s) by commissioning a survey of the Project Site prior to any construction on the property. All public utilities including water, sewer, natural gas, and electricity are within proximity to the site.

High Quality Development

Development of the Project Site must include high quality design, materials, and construction. The Project Site must comply with the standards of architecture, materials, and construction defined in the Plan. Applicants are encouraged to consult with the Village with questions relating to the development standards.

Sustainable & Energy Efficient

In addition to high-quality development, the Village expects that the Project will achieve sustainability and energy efficient goals that exceed the minimum requirements of the Florida Building Code. The Project should use environmentally-friendly and sustainable principles in project design and construction.

Distinctive Community Character

The Project should be attractive and compatible with the character of the neighborhood and larger community, both aesthetically and functionally, and consistent with land use and zoning requirements.

Local Preference

Preference shall be given to local applicants as specified in Section 2-328 of the Village's Code of Ordinances.

Timeline

The Village seeks to have the Project developed as soon as is practicable. Therefore, proposals will be judged on the practicality of timeliness and the Developer's demonstrated adherence to time schedules, as well as its ability to obtain all necessary plan approvals, financing and construction commitments so that construction may commence as soon as possible.

V. ELIGIBLE APPLICANTS

Eligible proposers under this RFQ may include one entity or a team of several entities, including any of the following: for-profit or non-profit housing Developers, joint ventures, resident services providers or other services agency. Applicants that include several entities must include a lead entity which has demonstrated experience and capacity in the development and management of affordable housing, and must have successfully completed affordable housing projects of similar size and complexity as the proposed project, within Monroe County, or another county in South Florida within the past fifteen (15) years, to be able to submit a proposal. Applicants with building residential projects in South Florida are encouraged to submit proposals.

VI. QUALIFICATIONS

Each Proposer responding to this RFQ 18-05 must have within its team direct successful experience in **at least three** or more of the following:

- a. Experience in the redevelopment or revitalization of neighborhoods;
- b. Experience in maximizing the use of house resources including real estate acquisition and financing mechanisms;
- c. Experience in the development, construction and operation of affordable/workforce/employee housing;
- d. Experience in site preparation and infrastructure development;
- e. Experience in obtaining low income housing tax credits;
- f. Experience in housing developments that incorporate tax credit financing or other federal, state or public or private affordable housing financing;

- g. Experience in residential rental property management including maintenance and security functions;
- h. Expertise in regulatory compliance issues, such as sound mitigation requirements for air installation compatible land use zones (AICUZ); and/or
- i. Expertise in Section 3 and Women Business Enterprise (WBE) and Minority Business Enterprise (MBE) compliance.

VII. PROPOSAL REQUIREMENTS

To be eligible for selection consideration, interested consultants/firms must submit one (1) original printed package, five (5) printed copies, and one (1) electronic copy on CD or flashdrive. The electronic copy should be identical to the original printed package, in natively converted PDF format. The Proposal Documents shall be enclosed in a sealed envelope and be plainly marked on the upper left-hand corner with the name and address of the Proposer and bear the following title: Islamorada, Village of Islands “**Request for Qualifications For Housing Development Services for Affordable and Employee Workforce Housing (RFQ-18-05)**”

Proposal packages must contain the following information:

1. **Statement of Interest/Cover Letter:** Provide a Statement of Interest/Cover letter introducing your firm and proposal.
2. **Statement of Qualifications/Company Overview:** Provide an overview of the company detailing the total number and expertise of professional staff, describing staff credentials, and identifying office locations and staff assigned to those offices throughout the Florida Keys or the nearest locations to the Florida Keys. Please note that the Village prefers to contract directly with prime entities and the use of sub-consultants in your submission may affect proposal scoring.
3. **Project Management Experience / Project Examples:** Provide at least three examples of successfully implemented projects that demonstrate experience with the services described in the scope of work, preferably in a local government setting. Include the client name, project name, project location and summary of services performed.
4. **Project Team Qualifications:** Provide the proposed team players and their qualifications to perform this project.
5. **Project Timeline and Fee Schedule:** Provide a unit cost and total fees for the service areas identified in the Scope of Services section of this RFQ. Provide a timeline for completion of the project.
6. **State Authorization to Transact Business:** Provide proof of authorization to transact business in the State from the Florida Secretary of State.
7. **Certificate of Authorization:** Provide certificate of authorization to offer professional services through the Florida Department of Professional Regulation, as applicable.
8. **Statement of Preference for Local Business:** Any business seeking certification as a local business shall provide an executed affidavit, in the Firm’s own form, certifying that it meets the criteria established in Village Code Section 2-327(e) for a determination as a local business. A complete

copy of the Village's Code of Ordinances can be accessed online by clicking on the 'Municode.com' Quick Link on the Village's website at <http://www.islamorada.fl.us/>.

VI. QUESTIONS/ADDENDA

The Village reserves the right to accept or reject any or all Proposals; to waive irregularities, technical errors and formalities; and to select a qualified firm(s) to provide the Services as it deems will best serve the interest of the Village.

All inquiries and requests for clarification or interpretation regarding this Request for Proposals shall be made in writing to the attention of the Procurement and Grants Administrator by mail to 86800 Overseas Highway, Islamorada, Florida 33036; by email to ana.hernandez@islamorada.fl.us; or by fax to (305) 664-6464 no later than February 23, 2018.

An **optional on-site visit or walk-through** of the Woods Avenue Site may be scheduled no later than five (5) calendar days prior to the Proposal submission deadline. To schedule an on-site visit, please contact the Procurement and Grants Administrator by telephone at (305) 664-6453, or by email to ana.hernandez@islamorada.fl.us.

The Village shall issue appropriate addenda as necessary via DemandStar at <https://www.demandstar.com/> and on the Village's website at <http://www.islamorada.fl.us/>. No oral change or interpretation of the provisions contained in this Request for Qualifications is valid. Written addenda shall be issued when changes, clarifications or amendments to the Request for Qualifications document are deemed necessary. The issuance of a written addendum is the only official method whereby interpretation, clarification or additional information can be given.

VIII. EVALUATION CRITERIA

It is important that Proposers clearly demonstrate their background and expertise in at least **three** of the areas described in this RFQ under Section VI. of this RFQ. Any Proposer who does not meet at least three of the criteria in Section VI shall be disqualified and the proposal deemed non-responsive and will not be further evaluated. Those proposals that meet at least three of those criteria, shall be evaluated by the evaluation committee.

The Village Manager will appoint members to the evaluation committee to evaluate the proposals according to the following factors:

	Evaluation Criteria	Weighting (Max. Points)
1.	Project/Management Approach	25
2.	Developer Qualifications	20
3.	Developer Experience	20
4.	Financial Capacity	20
5.	Developer Experience in Monroe County	10
6	References	10

QUALIFICATION SUBMISSION DOCUMENT

**REQUEST FOR QUALIFICATIONS FOR HOUSING DEVELOPMENT SERVICES
FOR AFFORDABLE AND EMPLOYEE WORKFORCE HOUSING (RFQ-18-05)**

STATEMENT OF QUALIFICATIONS (attach information as needed)

1. DEVELOPER INFORMATION

a. CONTACT INFORMATION

NAME:

ADDRESS:

CITY, STATE, ZIP:

TELEPHONE:

FAX:

EMAIL:

WEBSITE:

Type of Legal Entity:

If Corporation, LLC, LLP or Partnership please state jurisdiction where established and all jurisdictions where registered or authorized to do business as a foreign entity:

How long in existence:

SET FORTH OFFICIAL ENTITY REGISTRATION NUMBER FOR RELEVANT JURISDICTONS:

SET FORTH FEDERAL EMPLOYER IDENTIFICATION NUMBER (FEIN):

CONTACT PERSON:

NAME:

ADDRESS:

CITY, STATE, ZIP:

TELEPHONE:

FAX:

b. PRINCIPALS (Individuals) AND ENTITIES HOLDING ANY LEGAL, EQUITABLE, BENEFICIAL OR CONTRACTUAL INTEREST IN THE DEVELOPER ENTITY

1. List the name, address, position and description of the nature and percentage interest of each of the entity's shareholders with five (5) percent or more of the stock or, if a general partnership, a list of the general partners; or, if a limited liability company, a list of its members; if unincorporated and not a partnership, the name(s) of owners.
2. List the officers and directors of the entity;
3. State the number of years the entity has been operating and, if different, the number of years it has been providing the services, goods, or construction services called for in the RFQ;
4. State the number of years the entity has operated under its present name and any prior names; and
5. State whether, within the last five (5) years, an officer, general partner, controlling shareholder or major creditor of the bidder was an officer, general partner, controlling shareholder or major creditor of any other entity that failed to perform services or furnish goods similar to those sought in the request for bids.

c. MANAGEMENT APPROACH

Describe your organization and management approach identifying all key individuals, their qualifications and roles, including biographies of principals and an organizational chart.

2. DEVELOPMENT EXPERIENCE

List previous development experience of the Developer. Include brochure(s) and/or photographs of completed projects, if available. Copy and add additional sheets referencing “2. DEVELOPMENT EXPERIENCE” where appropriate.

PROJECT NAME:

LOCATION:

NUMBER OF UNITS:

TOTAL DEVELOPMENT COST:

TYPE AND SIZE OF UNITS:

DATE SELECTED AS DEVELOPER:

ORIGINAL PROJECTED COMPLETION DATE:

CURRENT STATUS:

FINANCING SOURCES AND AMOUNTS:

PROJECT REFERENCE CONTACT AND RELATIONSHIP:

PROJECT NAME:

LOCATION:

NUMBER OF UNITS:

TOTAL DEVELOPMENT COST:

TYPE AND SIZE OF UNITS:

DATE SELECTED AS DEVELOPER:

ORIGINAL PROJECTED COMPLETION DATE:

CURRENT STATUS:

FINANCING SOURCES AND AMOUNTS:

PROJECT REFERENCE CONTACT AND RELATIONSHIP:

PROJECT NAME:

LOCATION:

NUMBER OF UNITS:

TOTAL DEVELOPMENT COST:

TYPE AND SIZE OF UNITS:

DATE SELECTED AS DEVELOPER:

ORIGINAL PROJECTED COMPLETION DATE:

CURRENT STATUS:

FINANCING SOURCES AND AMOUNTS:

PROJECT REFERENCE CONTACT AND RELATIONSHIP:

PROJECT NAME:

LOCATION:

NUMBER OF UNITS:

TOTAL DEVELOPMENT COST:

TYPE AND SIZE OF UNITS:

DATE SELECTED AS DEVELOPER:

ORIGINAL PROJECTED COMPLETION DATE:

CURRENT STATUS:

FINANCING SOURCES AND AMOUNTS:

PROJECT REFERENCE CONTACT AND RELATIONSHIP:

3. PROJECT SPECIFIC EXPERIENCE

For each project described in 2, put an "x" in the box if your organization performed the function or utilized the described financing. For Section 3/MBE/WBE insert the appropriate numbers.

	Project 1	Project 2	Project 3	Project 4
Real Estate				
Development Feasibility Studies				
Sale of Real Estate				
Real Estate Redevelopment				
Zoning Approval				
Subdivision Approval				
Site Preparation Work				
Environmental Work				
Dedicated Infrastructure				
Other (specify)				
Financing Employed				
Financial Feasibility Studies				
LIHTC				
HOPE VI				
Home Funds				
CDBG				
FHA Multi-Family Insurance				
Fannie Mae DUS				
Federal Home Loan Bank				
Other Insurance Programs				
Village, County or Municipality Financing Programs				
Bank Financing				
Bond Financing				
Bond Underwriting				
Tax Credit Syndicator				
Personal Guarantees				
Corporate Guarantees				
Construction Services				
Construction Contractor				
Construction Manager				
Infrastructure Construction				
Design Services				
Property Management				
Marketing Plans				
Property Manager				
Site Maintenance				
Site Security				

	Project 1	Project 2	Project 3	Project 4
Section 3/MBE/WBE				
Dollars Paid as % of Total Development Cost				
# of Persons Employed				
Miscellaneous				
Mixed Finance Proposal				
Supportive Services				

4. ADDITIONAL EXPERIENCE

- a. How many projects have you completed using a ground lease scenario where underlying fee simple title to the developed property remained with a local government or a public or quasi-public entity?

- b. Describe your affordable/employee/workforce housing experience within Monroe County, including agencies, departments, municipalities and the like, specifying dates and projects involved.

- c. Does your company or organization have possession and use of property leased to you by, or title transferred to you by, the Village, Monroe County or any municipality within the Florida Keys? If so, please list each of these properties with their addresses, real estate numbers, whether leased or owned by you or your company and for how long, and a brief description of the development status of each. Also, briefly describe the conditions of the lease or ownership.

5. FINANCING/FINANCIAL CAPACITY

- a. Describe financing techniques for raising capital that your organization has employed.

- b. Describe your approach to managing the financial risk associated with affordable and workforce housing development.

- c. What is the nature and extent of your current equity interest(s), or that of any person or entity involved in this submission, in each of the projects described in 2 above?

d. Describe your experience with completing projects on budget and on schedule.

6. FINANCIAL RESPONSIBILITY

Submit current financial statements for the Developer Entity or Entities, including a balance sheet and statement of income and expenses prepared in accordance with Generally Accepted Accounting Principles.

7. REFERENCES

Provide the following references (including the name, telephone number and e-mail address of contact person):

Housing Authority / Agency:

Tax Credit Investor(s):

Architect(s):

Commercial Lenders/ Financial Institution(s):

Customers:

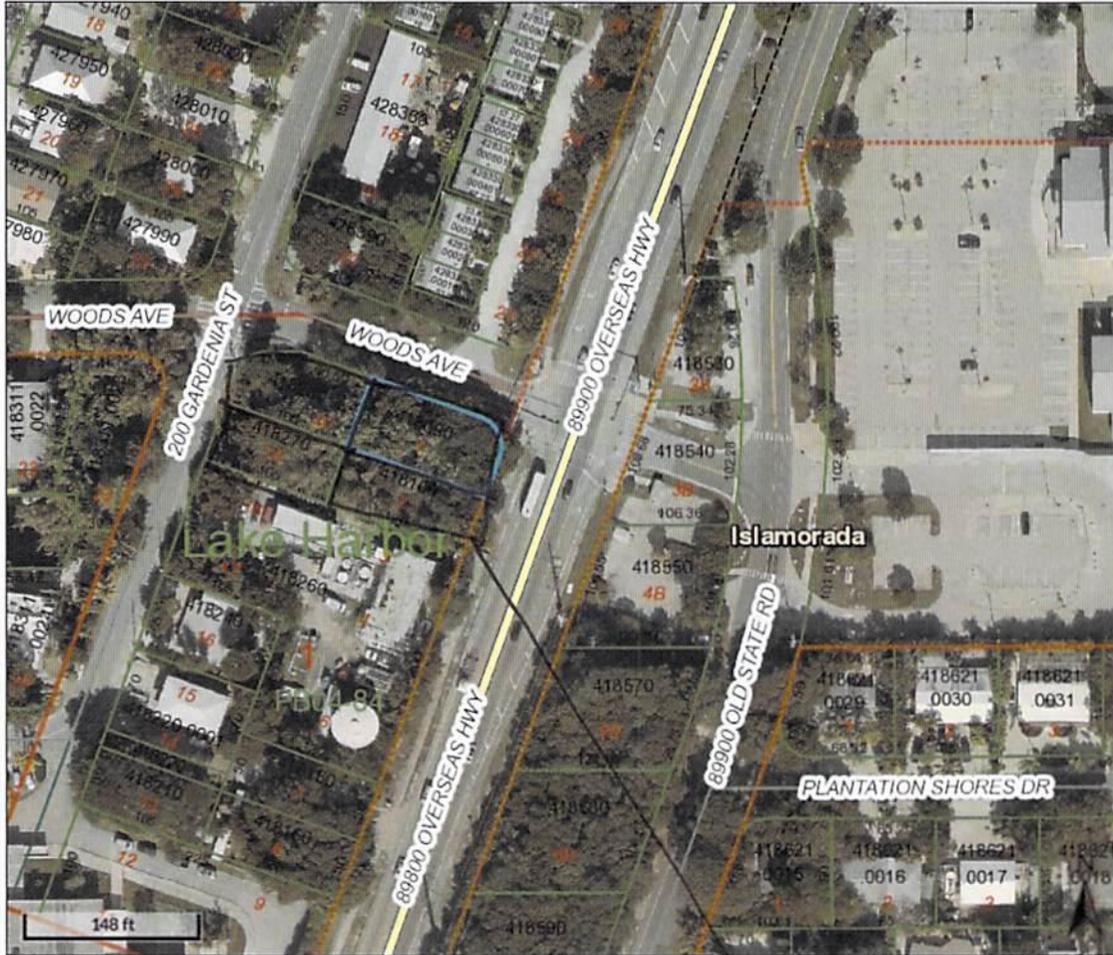
Creditors:

8. ADDITIONAL DEVELOPER INFORMATION

Please answer the following questions on behalf of the Developer (including officers, directors, partners, shareholders and materially interested persons); elaborate on a separate page if necessary.

If this submission reflects a team or joint venture, the questions pertain to each person or entity participating in the response and submission.

- a. The number of years the person or entity has operated under its present name and any prior names.
- b. Has the Developer ever been alleged to have failed to complete work or provide goods or services which it contracted to provide? (If yes, provide details.)
- c. Have there been any prior judgments, claims, arbitration proceeding or suits against the Developer? (If yes, provide details.)
- d. Has the Developer, within the last five (5) years, been a party to any lawsuit or arbitration with regard to a contract for services, goods or construction services similar to those requested in the specifications? (If yes, provide details.)
- e. Has the Developer ever initiated litigation against the Village or been sued by the Village in connection with a contract to provide services, goods or construction services? (If yes, provide details.)
- f. Whether, within the last five (5) years, has the Developer, or any of its officers, partners, shareholders or major creditors been the subject of or involved in any type of litigation or other legal or administrative proceeding where such party was alleged to have committed a crime or civil infraction (other than traffic or parking violations and the like), to have defaulted on or to have breached any duty or obligation, including those of a contractual or tortious nature? (If yes, provide details.)
- g. Has the Developer ever filed for or had filed against it any bankruptcy, receivership or similar action or petition? (If yes, provide details.)
- h. Has the Developer ever filed a claim under an insurance policy or had a loss covered by an insurer related to the nature or type of business and/or operations that could potentially be involved in providing services called for in this RFQ 18-05. Has a surety bond claim ever been made in connection with any of the Developer's activities/contracts? (If yes, provide details.)



Overview



Legend

- Major Roads
- Centerline
- Hooks
- Road Center
- Rights of Way
- Condo Building
- Conservation Easement
- Key Names
- Subdivisions
- Parcels

Parcel ID 00418090-000000 Alternate ID 1514241 Owner Address ISLAMORADA VILLAGE OF ISLANDS
 Sec/Twp/Rng 05/63/38 Class COMMERCIAL 86800 Overseas HWY
 Property Address VACANT LAND Islamorada, FL 33036
 PLANTATION KEY
 District 50VI
 Brief Tax BK 1 LT 1 LAKE HARBOR PB4-84 PLANTATION KEY OR561-509 OR819-874 OR1679-595L/E OR2100-2094D/C OR2782-1129/30L/E
 Description OR2854-1288D/C OR2854-1296ORD OR2856-773D/C OR2854-1299/301
 (Note: Not to be used on legal documents)

Date created: 1/23/2018
 Last Data Uploaded: 1/23/2018 8:47:49 AM

Developed by
 The Schneider Corporation

4 Lots on Woods Avenue