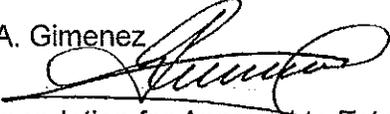


# Memorandum



**Date:** May 7, 2013

**To:** Honorable Chairwoman Rebeca Sosa  
and Members, Board of County Commissioners

**From:** Carlos A. Gimenez  
Mayor 

**Subject:** Recommendation for Approval to Establish a Pre-Qualified Pool of Vendors to Develop Affordable Housing on Public Housing Sites (RFQ794A)

Agenda Item No. 8(F)(4)

## Recommendation

It is recommended that the Board of County Commissioners (Board) approve the establishment of a pre-qualified pool of vendors to develop affordable housing on public housing sites on county-owned land for Public Housing and Community Development (PHCD).

## Scope

The impact of this item is countywide in nature.

## Fiscal Impact and Funding Source

There is no fiscal impact for the selection of developers for the Developer Pool (RFQ #794A), which is the action approved as part of this item.

However, there will be a fiscal impact after the pre-qualified developer pool responds to separate solicitations from PHCD for specific sites, developers are selected and approved by Board and a master development agreement is negotiated between the County and the developer and approved by Board.

## Track Record/Monitor

The contract manager for PHCD is Jorge Cibran. Fred Simmons Jr. of the Internal Services Department is the Procurement Contracting Officer.

## Delegated Authority

If this item is approved, the County Mayor or County Mayor's designee will have the authority to negotiate ground leases, master development agreements or any other applicable agreements or contracts, subject to the Board and the United States Department of Housing and Urban Development's approval.

## Vendors Recommended for Pre-qualification Pool

On October 5, 2012, a Request for Qualifications was issued and 11 proposals were received. The County may, at its sole discretion, reopen the Request for Qualifications process yearly to allow additional proposers to be added to the pool.

Awardee(s)	Address	Principal
Carlisle Development Group, LLC	2950 SW 27 Avenue Miami, FL	Matthew Greer
Carrfour Supportive Housing, Inc.	1398 SW 1 Street, 12 <sup>th</sup> Floor Miami, FL	Stephanie Berman
Community Housing Partners Corporation	448 Depot Street NE Christiansburg, VA	Janaka Casper

<b>Awardee(s) (continued)</b>	<b>Address</b>	<b>Principal</b>
Gorman & Company, Inc.	200 North Main Street Oregon, WI	Joyce S. Wuetrich
Housing Trust Group, LLC.	3225 Aviation Avenue, Suite 602 Coconut Grove, FL	Randy Rieger
Landmark Development Corporation	1666 Kennedy Causeway, Suite 505 North Bay Village, FL	Robert F. Saland
New Urban Development	8500 NW 25 Avenue Miami, FL	Oliver L. Gross
Pinnacle Housing Group, LLC.	9400 South Dadeland Blvd, Suite 100 Miami, FL	Louis Wolfson III
RUDG, LLC.	315 Biscayne Blvd, 3rd Floor Miami, FL	Alberto Milo
The Gatehouse Group	120 Forbes Blvd, Suite 180 Mansfield, MA	David J. Canepari
The Michaels Development Company 1, LP.	3 East Stow Road Marlton, NJ	Milton R. Pratt Jr.

**Vendor(s) Not Recommended for Pre-qualification Pool**

None

**Due Diligence**

Due diligence was conducted in accordance with the Internal Services Department's Procurement Guidelines to determine each contractors' responsibility, including verifying corporate status and that there are no performance or compliance issues. The lists that were referenced include: convicted vendors, debarred vendors, delinquent contractors, suspended vendors, and federal excluded parties. There were no adverse findings relating to Contractor responsibility. This information is being provided pursuant to Resolution R-187-12.

**Applicable Ordinances and Contract Measures**

Contract measures and the User Access Program fee do not apply due to Federal Funding Source.

**Background**

On July 14, 2011, a Request for Proposals No. 794 was issued to solicit offers from proposers to maximize and expedite the development potential of 104 existing public housing sites on county-owned land for the Department. The solicitation sought to establish partnerships with qualified developers to:

- rehabilitate/upgrade existing public housing units;
- remove and replace obsolete public housing units;
- increase the number of units on its underutilized sites; and
- develop vacant land owned by the County.

The County received 215 proposals from 26 proposers in response to the Request for Proposals of which 94 of the proposals received included nine percent Low Income Housing Tax Credits (Tax Credits) as part of their financing strategy. These efforts resulted in the selection of six developers and a recommendation for the approval of ground lease agreements for 28 sites. On November 23, 2011, the Board approved 52 ground leases conveying site control to the six selected developers for development of 28 of the 104 sites.

Subsequent to this action, the Board adopted Resolution R-152-12 on February 7, 2012 authorizing development of four additional sites and one additional developer, in which developers proposed utilizing four percent Tax Credits as a financing strategy. Resolution R-152-12 also rejected all remaining proposals. Following these events, a request was made by PHCD to issue a Request for Qualifications to establish a pre-qualified pool of developers that would be available as needed for public housing development opportunities.

The pool was advertised as RFQ794-A on October 5, 2012 to approximately 500 vendors in the procurement database for the commodity code related to developer services. Eleven proposals were received, evaluated and are recommended to establish a pool of prequalified developers. For any developers that did not have the opportunity to submit a proposal, the County will be reopening this RFQ on an annual basis to allow additional developers to submit proposals. The term of the RFQ will be five years with the option to renew for two, five-year periods.

A vendor's status as a pre-qualified proposer shall not be understood as a guarantee of work, rather, that the County has determined the vendor has successfully demonstrated its qualifications to perform work contemplated under the pool. After the pre-qualified pool has been established, the Department will request site applications from the developer pool to develop public housing. The Department, in conjunction with an independent consultant, will evaluate and prioritize which sites will have the best potential for development opportunities, including Tax Credits. Site applications will be limited to the prioritized sites and will include:

- Development approach and concept,
- Financial concept,
- Pro-formas, including all funding sources and uses of funds, and
- Terms and conditions, including participation in project by the County.

An Evaluation/Selection Committee will be convened by the Department, as necessary, to evaluate responses to the solicitation.



Russell Benford  
Deputy Mayor



**MEMORANDUM**  
(Revised)

**TO:** Honorable Chairwoman Rebeca Sosa  
and Members, Board of County Commissioners

**DATE:** May 7, 2013

**FROM:** R. A. Cuevas, Jr.  
County Attorney

**SUBJECT:** Agenda Item No. 8(F)(4)

Please note any items checked.

- "3-Day Rule" for committees applicable if raised
- 6 weeks required between first reading and public hearing
- 4 weeks notification to municipal officials required prior to public hearing
- Decreases revenues or increases expenditures without balancing budget
- Budget required
- Statement of fiscal impact required
- Ordinance creating a new board requires detailed County Mayor's report for public hearing
- No committee review
- Applicable legislation requires more than a majority vote (i.e., 2/3's \_\_\_\_, 3/5's \_\_\_\_, unanimous \_\_\_\_ ) to approve
- Current information regarding funding source, index code and available balance, and available capacity (if debt is contemplated) required

Approved \_\_\_\_\_ Mayor  
Veto \_\_\_\_\_  
Override \_\_\_\_\_

Agenda Item No. 8(F)(4)  
5-7-13

RESOLUTION NO. \_\_\_\_\_

RESOLUTION AUTHORIZING THE ESTABLISHMENT OF AN OPEN PRE-QUALIFIED DEVELOPER POOL TO DEVELOP EXISTING COUNTY OWNED PUBLIC HOUSING SITES IN SUPPORT OF THE COUNTY'S EFFORTS TO INCREASE AFFORDABLE, SUSTAINABLE, MIXED-INCOME AND/OR MIXED USE HOUSING, APPROVING THE INCLUSION OF CARLISLE DEVELOPMENT GROUP, LLC, CARRFOUR SUPPORTIVE HOUSING, INC., COMMUNITY HOUSING PARTNERS CORPORATION, GORMAN & COMPANY, INC., HOUSING TRUST GROUP, LLC, LANDMARK DEVELOPMENT CORPORATION, NEW URBAN DEVELOPMENT, PINNACLE HOUSING GROUP, LLC, RUDC, LLC, THE GATEHOUSE GROUP, AND THE MICHAELS DEVELOPMENT COMPANY 1, LP AS PRE-QUALIFIED DEVELOPERS AND INCLUDED IN THE PRE-QUALIFIED POOL, AND APPROVING THE COUNTY MAYOR OR COUNTY MAYOR'S DESIGNEE TO APPROVE ADDITIONAL DEVELOPERS WHO MEET ESTABLISHED QUALIFICATION CRITERIA TO BE ADDED TO THE POOL

**WHEREAS**, this Board desires to accomplish the purposes outlined in the accompanying memorandum, a copy of which is incorporated herein by reference,

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF COUNTY COMMISSIONERS OF MIAMI-DADE COUNTY, FLORIDA**, that that this Board approves the establishment of an open pre-qualification developer pool, approves Carlisle Development Group, LLC, Carrfour Supportive Housing, Inc., Community Housing Partners Corporation, Gorman & Company, Inc., Housing Trust Group, LLC, Landmark Development Corporation, New Urban Development, Pinnacle Housing Group, LLC, RUDC, LLC, The Gatehouse Group, and The Michaels Development Company 1, LP as pre-qualified pool members, and authorizes

the County Mayor or County Mayor's designee to approve additional Developers that meet established qualification criteria to be added to the pool.

The foregoing resolution was offered by Commissioner  
who moved its adoption. The motion was seconded by Commissioner  
and upon being put to a vote, the vote was as follows:

Rebeca Sosa, Chairwoman

Lynda Bell, Vice Chair

Bruno A. Barreiro

Jose "Pepe" Diaz

Sally A. Heyman

Jean Monestime

Sen. Javier D. Souto

Juan C. Zapata

Esteban L. Bovo, Jr.

Audrey M. Edmonson

Barbara J. Jordan

Dennis C. Moss

Xavier L. Suarez

The Chairperson thereupon declared the resolution duly passed and adopted this 7<sup>th</sup> day of May, 2013. This resolution shall become effective ten (10) days after the date of its adoption unless vetoed by the Mayor, and if vetoed, shall become effective only upon an override by this Board.

MIAMI-DADE COUNTY, FLORIDA  
BY ITS BOARD OF  
COUNTY COMMISSIONERS

HARVEY RUVIN, CLERK

By: \_\_\_\_\_  
Deputy Clerk

Approved by County Attorney as  
to form and legal sufficiency.



Terrence A. Smith

# Memorandum



**Date:** December 17, 2012

**To:** Lester Sola, Director  
Internal Services Department

**Thru:** Miriam Singer, CPPO  
Assistant Director  
Internal Services Department

**From:** Fred Simmons, Jr., CPPO   
Senior Procurement Contracting Officer  
Chairperson, Evaluation/Selection Committee

**Subject:** Report of Evaluation/Selection Committee for RFQ No. 794-A:  
Developer Qualification

The County issued the subject solicitation to obtain proposals from firms to establish a pre-qualified vendor pool to develop existing County owned public housing sites. To qualify for placement in the pre-qualified pool, proposers must meet the minimum qualification requirements criteria included in Section 2.0 of the solicitation. Proposals were evaluated on a pass/fail basis. Minimum qualification criteria include:

- 1) Proposer must submit documentation for three developments that have obtained financing, are ongoing or have been completed within the last five years, including information as required in Section 3.0. For purposes of this requirement, the term "financing" shall mean a loan or other contractual commitment of funds specific to the project, issued by a lending institution, governmental entity or other entity not related directly or indirectly to the Proposer who is in the business of funding development projects.
- 2) Proposer must submit verifiable documentation as proof of its ability to obtain necessary local, state and federal approvals for development projects. Such documentation may be in the form of official records, certificates, approval forms, etc. from local, state and federal agencies indicating required approvals, as applicable, for affordable, sustainable and mixed-income and/or mixed-use housing development projects were obtained by or on behalf of the Proposer, including information as required in Section 3.0.
- 3) Proposer must demonstrate it has experience with the U.S. Department of Housing and Urban Development (HUD) requirements for development of affordable, sustainable and mixed-income and/or mixed-use housing development projects, and experience in working with HUD. Such proof may include documentation demonstrating that the Proposer has worked with HUD and obtained approval(s) evidencing compliance with applicable requirements for projects. Experience demonstrated should be of an ongoing nature, indicating that the Proposer understands and has demonstrated experience over several projects working with HUD, including information as required in Section 3.0.

## BACKGROUND

The County received 11 proposals in response to RFQ No. 794-A. All proposals met the submission requirement and were responsive. Proposals received and evaluated include:

- 1) Carlisle Development Group, LLC
- 2) Carrfour Supportive Housing, Inc.
- 3) Community Housing Partners Corporation
- 4) Gorman & Company, Inc.
- 5) Housing Trust Group, LLC

- 6) Landmark Development Corporation
- 7) Pinnacle Housing Group
- 8) RUDC, LLC
- 9) The Gatehouse Group
- 10) The Michaels Development Company 1, LP
- 11) Urban League of Greater Miami

All proposals were evaluated by the Evaluation/Selection Committee (Committee). The Committee has completed the evaluation of proposals submitted in response to the solicitation following the guidelines published in the solicitation document.

**Committee Meetings:** The 11 proposals were issued to Committee members in advance of the evaluation meeting. The Committee held one (1) meeting to score proposals. The Committee determined oral presentations were not necessary.

- December 13, 2012: Evaluation and final scoring

**Verification of Compliance with Contract Measures:** N/A

**Verification of compliance with minimum qualification requirements:**

The Committee was tasked to review proposals and determine if the proposal met the minimum qualification requirements to be included in the pre-qualification pool.

**Local Certified Service-Disabled Veteran's Business Enterprise Preference:** Local Certified Service-Disabled Veteran's Business Enterprise Preference does not apply.

**Summary of Scores:**

The Committee completed evaluation of all proposals submitted following the guidelines published in the solicitation. The Committee determined that all proposals met the minimum qualification requirements. Committee evaluation sheets are attached.

**Local Preference:** The Local Preference Ordinance does not apply.

**Other Information:** The term of the pre-qualification pool resulting from this RFQ is five years, with the option, at the County's sole discretion, to renew for two five year periods. The County may, at its sole discretion, reopen the RFQ process yearly to allow additional proposers to be added to the pool. After the pre-qualified pool has been established, Public Housing Community Development (PHCD) will issue a solicitation to pool members when development opportunities arise. Pool members will respond to the specific solicitation when seeking development opportunities. An Evaluation/Selection Committee will be convened by PHCD as necessary to evaluate responses to the solicitation.

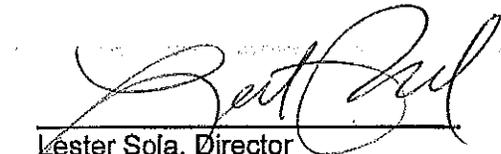
**Negotiations:** N/A

**Consensus Statement:**

The Committee was tasked with determining if proposers met the minimum qualification requirements to be placed in the pre-qualification pool. The Community unanimously agreed that all proposers met all the minimum qualification requirements, and is recommended for placement in the pre-qualification pool.

Copies of the score sheets are attached for each Evaluation/Selection Committee member, as well as a composite score sheet.

Approved

  
\_\_\_\_\_  
Lester Sola, Director  
Internal Services Department

1/31/13  
Date

RFQ NO. 794-A  
 DEVELOPER QUALIFICATION  
 EVALUATION OF PROPOSALS  
 COMPOSIT

SELECTION CRITERIA	PROPOSERS	PASS/FAIL	CARLISLE DEVELOPMENT GROUP, LLC	CARRFOUR SUPPORTIVE HOUSING, INC.	COMMUNITY HOUSING PARTNERS CORP.	GORMAN & COMPANY, INC.	HOUSING TRUST GROUP, LC	LANDMARK DEVELOPMENT CORP.	PINNACLE HOUSING GROUP	RUGS, LLC	THE GATE HOUSE GROUP	THE MICHAELS DEVELOPMENT GROUP COMPANY 1	URBAN LEAGUE OF GREATER MIAMI, INC.
Submission of documentation for three developments that have obtained financing, are ongoing or have been completed within the last five years; requirements in 2.0.		PASS	P	P	P	P	P	P	P	P	P	P	P
Submission of verifiable documentation as proof of ability to obtain zoning, local, state and federal approvals for development projects.		PASS	P	P	P	P	P	P	P	P	P	P	P
Demonstration of experience with the U.S. Department of Housing and Urban Development (HUD) requirements for development of affordable, sustainable and mixed-income and/or mixed-use housing development projects, and experience in working with HUD.		PASS	P	P	P	P	P	P	P	P	P	P	P

*[Signature]*  
 DATE 12/17/12

RATING GUIDELINES:

1	Excellent	5
2	Very Good	4
3	Good	3
4	Fair	2
5	Poor	1
6	Unsatisfactory	0

RFQ NO. 794-A  
 DEVELOPER QUALIFICATION  
 EVALUATION OF PROPOSALS  
 RUTH CASTELLANOS (ISD)

SELECTION CRITERIA	PROPOSERS	CARLISLE DEVELOPMENT GROUP, LLC	CARRFOUR SUPPORTIVE HOUSING, INC.	COMMUNITY HOUSING PARTNERS CORP.	GORMAN & GORMAN COMPANY, INC.	HOUSING TRUST GROUP, LC	LANDMARK DEVELOPMENT CORP.	PINNACLE HOUSING GROUP	RUGG, LLC	THE GATE HOUSE GROUP	THE MICHAELS DEVELOPMENT GROUP COMPANY 1	URBAN LEAGUE OF GREATER MIAMI, INC.
<p>Submission of documentation for three developments that have obtained financing, are ongoing or have been completed within the last five years; requirements in 2.11.</p> <p>Submission of verifiable documentation as proof of ability to obtain necessary local, state and federal approvals for development projects.</p> <p>Demonstration of experience with the U.S. Department of Housing and Urban Development (HUD) requirements for development of affordable, sustainable and mixed-income and/or mixed-use housing development projects, and experience in working with HUD.</p>	PASS	P	P	P	P	P	P	P	P	P	P	P
	PASS	P	P	P	P	P	P	P	P	P	P	P
	PASS	P	P	P	P	P	P	P	P	P	P	P

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

**RATING GUIDELINES:**  
 Committee members shall indicate if the Proposer: pass or fail the particular selection criteria by placing a "P" or "F" in the appropriate box.

SELECTION CRITERIA	PROPOSER	COMMITTEE MEMBER 1	COMMITTEE MEMBER 2	COMMITTEE MEMBER 3	COMMITTEE MEMBER 4	COMMITTEE MEMBER 5
Submission of documentation for three developments that have obtained financing, are ongoing or have been completed within the last five years; requirements in 2.11.	P	P	P	P	P	P
Submission of verifiable documentation as proof of ability to obtain necessary local, state and federal approvals for development projects.	P	P	P	P	P	P
Demonstration of experience with the U.S. Department of Housing and Urban Development (HUD) requirements for development of affordable, sustainable and mixed-income and/or mixed-use housing development projects, and experience in working with HUD.	P	P	P	P	P	P





RFQ NO. 794-A  
DEVELOPER QUALIFICATION  
EVALUATION OF PROPOSALS  
JORGE CIERAN (PHCD)

SELECTION CRITERIA	PROPOSERS	CARLISLE DEVELOPMENT GROUP, LLC	CARFOUR SUPPORTIVE HOUSING, INC.	COMMUNITY HOUSING PARTNERS CORP.	GORMAN & COMPANY, INC.	HOUSING TRUST GROUP, LC	LANDMARK DEVELOPMENT CORP.	PINNACLE HOUSING GROUP	RUGC, LLC	THE GATE HOUSE GROUP	THE MICHAELS DEVELOPMENT GROUP COMPANY, 1	URBAN LEAGUE OF GREATER MIAMI, INC.
Submission of documentation for three developments that have obtained financing, are ongoing or have been completed within the last five years; requirements in 2.2.	PASS/FAIL	P	P	P	P	P	P	P	P	P	P	P
Submission of verifiable documentation as proof of ability to obtain necessary local, state and federal approvals for development projects.	PASS/FAIL	P	P	P	P	P	P	P	P	P	P	P
4 Demonstration of experience with the U.S. Department of Housing and Urban Development (HUD) requirements for development of affordable, sustainable and mixed-income and/or mixed-use housing development projects, and experience in working with HUD.	PASS/FAIL	P	P	P	P	P	P	P	P	P	P	P

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

**RATING GUIDELINES:**

Committee members shall indicate if the proposer pass or failed the pre-qualified selection criteria by placing a "P" or "F" in the appropriate column.												



RFQ NO. 794-A  
 DEVELOPER QUALIFICATION  
 EVALUATION OF PROPOSALS  
 RUTH CASTELLANOS (ISD)

SELECTION CRITERIA	PROPOSERS	CARRIFOUR SUPPORTIVE HOUSING, INC.	COMMUNITY HOUSING SERVICES CORP.	GORMAN & COMPANY, INC.	HOUSING TRUST GROUP, L.C.	LANDMARK DEVELOPMENT CORP.	PINNACLE HOUSING GROUP	THE GATE HOUSE GROUP	THE MICHAELS DEVELOPMENT GROUP COMPANY, I	URBAN LEAGUE OF GREATER MIAMI, INC.
Submission of documentation for three developments that have obtained financing, are ongoing or have been completed within the last five years; requirements in 2.D.	PASS FAIL	P	P	P	P	P	P	P	P	P
Submission of verifiable documentation as proof of ability to obtain necessary local, state and federal approvals for development projects.	PASS FAIL	P	P	P	P	P	P	P	P	P
Documentation of experience with the U.S. HUD requirements for and Urban Development Corporation (UDC) requirements for affordable, sustainable and mixed-income and/or mixed-use housing development projects, and experience in working with HUD.	PASS FAIL	P	P	P	P	P	P	P	P	P

*[Handwritten signature]*  
 DATE

RATING GUIDELINES:

Committee member shall indicate if the Proposer pass or failed the particular selection criteria by placing a "P" or "F" in the appropriate box.	

RFQ NO. 794-A  
 DEVELOPER QUALIFICATION  
 EVALUATION OF PROPOSALS  
 RALPH CUTIE (ISD)

SELECTION CRITERIA	PROPOSERS	CARLISLE DEVELOPMENT GROUP, LLC	CARRFOUR SUPPORTIVE HOUSING, INC.	COMMUNITY HOUSING PARTNERS CORP.	GORMAN & COMPANY, INC.	HOUSING TRUST GROUP, LC	LANDMARK DEVELOPMENT CORP.	PINNACLE HOUSING GROUP	RUDG RUDG, LLC	THE GATE HOUSE GROUP	THE MICHAELS DEVELOPMENT GROUP COMPANY 1	URBAN LEAGUE OF GREATER MIAMI, INC.
Submission of documentation for three developments that have obtained financing, are ongoing or have been completed within the last five years; requirements in 2.0.	PASS	P	P	P	P	P	P	P	P	P	P	P
Submission of verifiable documentation as proof of ability to obtain necessary local, state and federal approvals for development projects.	PASS	P	P	P	P	P	P	P	P	P	P	P
Demonstration of experience with the U.S. Department of Housing and Urban Development (HUD) requirements for development of affordable, sustainable and mixed-income and/or mid-class housing development projects, and experience in working with HUD.	PASS	P	P	P	P	P	P	P	P	P	P	P

12/13/12  
 DATE

*[Signature]*  
 SIGNATURE

RATING GUIDELINES:

Committee member shall indicate if the Proposer pass or failed the particular selection criteria by placing a "P" or "F"

RFQ NO. 794-A  
DEVELOPER QUALIFICATION  
EVALUATION OF PROPOSALS

JOSE GALAN (ISD)

SELECTION CRITERIA	PROPOSERS	CARLISLE DEVELOPMENT GROUP, LLC	CARRFOUR SUPPORTIVE HOUSING, INC.	COMMUNITY HOUSING PARTNERS CORP.	GORMAN & COMPANY, INC.	HOUSING TRUST GROUP, LC	LANDMARK DEVELOPMENT CORP.	PINNACLE HOUSING GROUP	2 UDC RUCG, LLC	THE GATE HOUSE GROUP	THE MICHAELS DEVELOPMENT GROUP COMPANY 1	URBAN LEAGUE OF GREATER MIAMI, INC.
<p>Submission of documentation for three developments that have obtained financing, are ongoing or have been completed within the last five years; requirements in 2.B.</p> <p>Submission of verifiable documentation as proof of ability to obtain necessary local, state and federal approvals for development projects.</p> <p>Demonstration of experience with the U.S. Department of Housing and Urban Development (HUD) requirements for development of affordable housing and related income and/or mixed-use housing development projects, and experience in working with HUD.</p>	PASS	P	P	P	P	P	P	P	P	P	P	P
	PASS	P	P	P	P	P	P	P	P	P	P	P
	PASS	P	P	P	P	P	P	P	P	P	P	P

DATE 12-13-12

**BIDDING GUIDELINES**

Committee member shall indicate if the Proposer pass or failed the particular selection criteria by placing a "P" or "F" in the appropriate box.	

RFQ NO. 794-A  
DEVELOPER QUALIFICATION  
EVALUATION OF PROPOSALS

J. JORGE CIBRAN (PHD)

SELECTION CRITERIA	PROPOSERS	CARLSLE DEVELOPMENT GROUP, LLC	CARRFOUR SUPPORTIVE HOUSING, INC.	COMMUNITY HOUSING PARTNERS CORP.	GORMAN & COMPANY, INC.	HOUSING TRUST GROUP, LC	LANDMARK DEVELOPMENT CORP.	PINNACLE HOUSING GROUP	RARE HOUSING, LLC	THE GATE HOUSE GROUP	THE MICHAELS DEVELOPMENT GROUP COMPANY, 1	URBAN LEAGUE OF GREATER MIAMI, INC.
Submission of documentation for three developments that have obtained financing, are engineering or have been completed within the last five years, requirements in 2.1.	PASS	PASS	PASS	PASS	PASS	PASS	PASS	PASS	PASS	PASS	PASS	PASS
Submission of verifiable documentation as proof of ability to obtain necessary local, state and federal approvals for development projects.	PASS	PASS	PASS	PASS	PASS	PASS	PASS	PASS	PASS	PASS	PASS	PASS
Demonstration of experience with the U.S. Department of Housing and Urban Development (HUD) requirements for development of affordable, sustainable and mixed-income and/or micro-use housing development projects, and experience in working with HUD.	PASS	PASS	PASS	PASS	PASS	PASS	PASS	PASS	PASS	PASS	PASS	PASS

*Jorge P. Cibran*  
SIGNATURE  
12/13/12  
DATE

RATING GUIDELINES:

Committee member shall indicate if the Proposer/Pass or failed the particular selection criteria by placing an "X" in the appropriate box.	

RFQ NO. 784-A  
 DEVELOPER QUALIFICATION  
 EVALUATION OF PROPOSALS  
 JOSE RODRIGUEZ (PHCD)

SELECTION CRITERIA	PROPOSERS	CARLISLE DEVELOPMENT GROUP, LLC	CARRFOUR SUPPORTIVE HOUSING, INC.	COMMUNITY HOUSING PARTNERS CORP.	GORMAN & COMPANY, INC.	HOUSING TRUST GROUP, LC	LANDMARK DEVELOPMENT CORP.	PINNACLE HOUSING GROUP	RUGBY, LLC	THE GATE HOUSE GROUP	THE MICHAELS DEVELOPMENT GROUP COMPANY 1	URBAN LEAGUE OF GREATER MIAMI, INC.
Submission of documentation for these developments that have obtained financing, are ongoing or have been completed within the last five years; requirements in 2.A.		Pass	Pass	P	P	P	Pass	Pass	Pass	Pass	Pass	Pass
Submission of verifiable documentation as proof of ability to obtain necessary local, state and federal approvals for development projects.		Pass	Pass	P	P	P	Pass	Pass	Pass	Pass	Pass	Pass
Demonstration of experience with the U.S. Department of Housing and Urban Development (HUD) requirements for development of affordable, sustainable and mixed-income and/or mixed-use housing development projects, and experience in working with HUD.		Pass	Pass	P	P	P	Pass	Pass	Pass	Pass	Pass	Pass

*[Signature]*  
 SIGNATURE  
 DATE 12/13/12

RATING GUIDELINES:

Committee member shall indicate if the proposer pass or failed the particular selection criteria by placing a "P" or "F" in the appropriate box.												

# Memorandum



**Date:** November 13, 2012

**To:** Those Listed Below

**From:** Carlos A. Gimenez  
Mayor

A handwritten signature in black ink, appearing to read "Carlos A. Gimenez", written over the printed name and title.

**Subject:** Appointment of Selection Committee for Miami-Dade Public Housing and Community Development Department Request for Qualifications (RFQ) for Developer Qualifications – RFQ No. 794A.

---

In accordance with Administrative Order 3-34, I am hereby appointing those listed below as the Selection Committee for Miami-Dade Public Housing and Community Development Department Request for Qualifications (RFQ) for Developer Qualifications – RFQ No. 794A.

Selection Committee

Fred Simmons, CPPO, ISD (Non-Voting Chairperson)  
Ralph Cutie, ISD  
Jose Galan, ISD  
Ruth Castellanos, ISD  
Jorge Cibrán, PHCD  
Jose Rodriguez, PHCD  
Craig Clay, PHCD (Alternate)

Technical Advisor

Penelope Bivins, PHCD

You are directed to assist me in the selection process considering the factors delineated in the solicitation. If you are unable to participate in the selection process, contact this office through Small Business Development (SBD) by memorandum from your department director documenting the reason why you cannot participate. Only in cases of **dire** urgency may you be excused from participation.

Each Selection Committee member shall be responsible for evaluating, rating and ranking the proposals based on the criteria and procedure contained in the solicitation. The Selection Committee will meet to review the written proposals. If required, the Selection Committee will select firms to make oral presentations to the Selection Committee at a properly noticed public hearing. If proposers are invited to make oral presentations, the Selection Committee may re-rate and re-rank the proposals based upon the written documents combined with the oral presentation. You may utilize staff of the issuing department and the using agency to conduct a preliminary review of the proposals for responsiveness. All requests for responsiveness determinations shall be made in writing by the issuing department to the County Attorney's Office.

The alternate committee member will serve only in the event of an approved substitution. No substitution of committee members shall be allowed after the first official meeting of the committee. The Internal Services Department (ISD) may substitute the chairperson to ensure the appropriate level of staffing expertise as deemed necessary to accommodate the needs of this solicitation.

Upon completion of the evaluation process, the Selection Committee Chairperson shall prepare and submit a memorandum to include a narrative of the evaluation and justification of the recommended firm(s) with attach supporting documentation which MUST include the following information:

Name of firm(s)  
Quality Rating Score  
Price  
Adjusted Score (if applicable)  
Committee's Overall Ranking

This report should be submitted to me through ISD for review and consideration.

As a matter of administrative policy and to maintain a fair and impartial process, all individuals appointed to the Selection Committee (including the Chairperson) and staff are instructed to refrain from discussing the solicitation with prospective lobbyist and/or consultants. Selection Committee members are reminded that in accordance with the Cone of Silence Ordinance 98-106, they are restrictions on communications regarding the solicitation with potential proposers, service providers, lobbyists, consultants, or any member of the County's professional staff. Violation of this policy could lead to termination of County service.

All questions must be directed to the staff contact person designated by the issuing department.

c: Lester Sola, Director, ISD  
Gregg Fortner, Director, PHCD  
Jack Osterholt, Deputy Mayor/Director, RER  
Mario Goderich, Assistant Director, Business Affairs/RER

Selection Committee

Fred Simmons, CPPO, ISD (Non-Voting Chairperson)  
Ralph Cutie, ISD  
Jose Galan, ISD  
Ruth Castellanos, ISD  
Jorge Cibran, PHCD  
Jose Rodriguez, PHCD  
Craig Clay, PHCD (Alternate)

Technical Advisor

Penelope Bivins, PHCD

**SELECTION COMMITTEE  
PUBLIC HOUSING AND COMMUNITY DEVELOPMENT  
REQUEST FOR QUALIFICATIONS  
DEVELOPER QUALIFICATIONS**

**RFQ NO. 794A**

Committee Member/ Title	Department	Start Year With County	Ethnicity/ Gender	Education	Professional License(s)/ Certification(s)	Telephone #
Fred Simmons, CPPO (Non-Voting Chairperson)	ISD	--	--	--	--	305-375-4259
Ralph Cutie Manager, GOB Project Scheduling and Compliance	ISD	1990	Hispanic Male	Bachelor of Science in Construction Management	None	305-375-1457
Jose Galan Acting Division Director	ISD	1988	Hispanic Male	Master of Business Administration	None	305-375-5057
Ruth Castellanos Special Projects Administrator 1	ISD	1996	Hispanic Female	Bachelor of Arts	None	305-375-2082
Jorge Cibran Facilities & Development Director	PHCD	2009	Hispanic Male	Master of Architecture	Registered Architect, Member of the American Institute of Architects	786-469-4118
Jose Rodriguez Construction Manager 3	PHCD	1992	Hispanic Male	Bachelor of Architecture	R.A., G.C.	786-469-4120
Craig Clay Deputy Director (ALTERNATE)	PHCD	2006	Black Male	Master of Public Administration	None	786-469-4192
<b>TECHNICAL ADVISOR</b>						
Penelope Bivins Resident Services Coordinator	PHCD	1985	Black Female	Bachelor of Business Administration	None	786-469-4133

**REQUEST FOR QUALIFICATIONS (RFQ) No. 794A  
FOR  
DEVELOPER QUALIFICATIONS**

**PRE-PROPOSAL CONFERENCE TO BE HELD:**

October 12, 2012 at 4:00 PM (local time)  
111 NW 1<sup>st</sup> Street, 18<sup>th</sup> Floor, Conf. Rm. 18-3, Miami, Florida 33128

**ISSUED BY MIAMI-DADE COUNTY:**

Internal Services Department, Procurement Management Division  
for  
Public Housing and Community Development (PHCD)

**COUNTY CONTACT FOR THIS SOLICITATION:**

Name and Title: Fred Simmons, Jr., Sr. Procurement Contracting Officer  
Address: 111 NW 1<sup>st</sup> Street, Suite 1300, Miami, Florida 33128  
Telephone: (305) 375-4259  
E-mail: [fred@miamidade.gov](mailto:fred@miamidade.gov)

**PROPOSALS ARE DUE AT THE CLERK OF THE BOARD NO LATER THAN:**

October 19, 2012 at 2:00 PM (local time)  
at  
CLERK OF THE BOARD  
Stephen P. Clark Center  
111 NW 1<sup>st</sup> Street, 17<sup>th</sup> Floor, Suite 202  
Miami, Florida 33128-1983

The Clerk of the Board business hours are 8:00 a.m. to 4:30 p.m., Monday through Friday. Additionally, the Clerk of the Board is closed on holidays observed by the County.

All proposals received and time stamped by the Clerk of the Board prior to the proposal submittal deadline shall be accepted as timely submitted. The circumstances surrounding all proposals received and time stamped by the Clerk of the Board after the proposal submittal deadline will be evaluated by the procuring department in consultation with the County Attorney's Office to determine whether the proposal will be accepted as timely. Proposals will be opened promptly at the time and date specified. The responsibility for submitting a proposal on or before the stated time and date is solely and strictly the responsibility of the Proposer. The County will in no way be responsible for delays caused by mail delivery or caused by any other occurrence. All expenses involved with the preparation and submission of proposals to the County, or any work performed in connection therewith, shall be borne by the Proposer(s).

The submittal of a proposal by a Proposer will be considered by the County as constituting an offer by the Proposer to perform the required services at the stated prices. A Proposer may submit a modified proposal to replace all or any portion of a previously submitted proposal up until the proposal due date. The County will only consider the latest version of the proposal.

Requests for additional information or inquiries must be made in writing and received by the County's contact person for this Solicitation. The County will issue responses to inquiries and any changes to this Solicitation it deems necessary in written addenda issued prior to the proposal due date. Proposers who obtain copies of this Solicitation from sources other than the County's Internal Services Department website at [www.miamidade.gov/dpm](http://www.miamidade.gov/dpm) or the Vendor Assistance Unit risk the possibility of not receiving addenda and are solely responsible for those risks.

this Solicitation it deems necessary in written addenda issued prior to the proposal due date. Proposers who obtain copies of this Solicitation from sources other than the County's Department of Procurement Management website at [www.miamidade.gov/dpm](http://www.miamidade.gov/dpm) or the Vendor Assistance Unit risk the possibility of not receiving addenda and are solely responsible for those risks.

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**1.0 OVERVIEW**

**1.1 INTRODUCTION**

Miami-Dade County, hereinafter referred to as the County, as represented by Public Housing and Community Development (PHCD), through this Request for Qualifications (RFQ), seeks to pre-qualify Proposers to develop existing County owned public housing sites to accomplish the goals stated herein.

**General Information:**

The term of the pre-qualification pool resulting from this RFQ is five years, with the option, at the County's sole discretion, to renew for two five year periods. The County may, at its sole discretion, reopen the RFQ process yearly to allow additional proposers to be added to the pool. A vendor's status as a Pre-qualified Proposer shall not be understood as a guarantee of work, rather that the County has determined the vendor has successfully demonstrated its qualifications to perform work contemplated under the pool. After the pre-qualified pool has been established, PHCD will issue a solicitation to pool members when development opportunities arise. Pool members will respond to the specific solicitation when seeking development opportunities. An Evaluation/Selection Committee will be convened as necessary to evaluate responses to the PHCD solicitation.

The anticipated schedule for this Solicitation is as follows:

- Solicitation issued: October 5, 2012
- Pre-Proposal Conference: See front cover for date, time and place. Attendance is recommended but not mandatory. If you need a sign language interpreter or materials in accessible format for this event, please call the DPM ADA Coordinator at (305) 375-1530 at least five days in advance.
- Deadline for receipt of questions: October 16, 2012
- Proposal due date: October 19, 2012: See front cover for time and place.
- Evaluation process: Week of October 22, 2012
- Board Approval November 2012

**1.2 Definitions**

The following words and expressions used in this Solicitation shall be construed as follows, except when it is clear from the context that another meaning is intended:

1. The word "Contractor" to mean the Proposer that receives any award of a contract from the County as a result of this Solicitation, also to be known as "the prime Contractor".
2. The word "County" to mean Miami-Dade County, a political subdivision of the State of Florida.
3. The word "Proposer" to mean the person, firm, entity or organization, as stated on Form A-1, submitting a response to this Solicitation.
4. The words "Scope of Services" to mean Section 2.0 of this Solicitation, which details the work to be performed by the Contractor.
5. The word "Solicitation" to mean this Request for Qualifications (RFQ) document, and all associated addenda and attachments.
6. The word "Subcontractor" or "Consultant" to mean any person, firm, entity or organization, other than the employees of the Contractor, who contracts with the Contractor to furnish

labor, or labor and materials, in connection with the Services to the County, whether directly or indirectly, on behalf of the Contractor.

7. The words "Work", "Services", "Program", or "Project" to mean all matters and things that will be required to be done by the Contractor in accordance with terms and conditions of this Solicitation.
8. The word "Proposal" shall mean the response to the Request for Qualifications (RFQ) forwarded by Proposer(s) to the County.
9. The words "Qualified Proposer(s)" to mean the Proposer(s) which have been evaluated and pre-qualified for the developer pool by the County's Evaluation/Selection Committee.
10. The words "Selected Proposer(s)" to mean the Proposer(s) which have been selected by the County to develop a site.

### **1.3 General Proposal Information**

The County may, at its sole and absolute discretion, reject any and all or parts of any or all responses; accept parts of any and all responses; further negotiate project scope and fees; postpone or cancel at any time this Solicitation process; or waive any irregularities in this Solicitation or in the responses received as a result of this process. Proposers may take exceptions to any of the terms of this Solicitation unless the Solicitation specifically states where exceptions may not be taken. The County may accept or reject the exceptions at its sole discretion and the Proposer's proposal shall be binding on the Proposer as if submitted without exception. The County reserves the right to request and evaluate additional information from any respondent after the submission deadline as the County deems necessary.

Proposals once opened, shall constitute an irrevocable statement of the proposers intent to be qualified and to participate in the process of contract award in the manner set in this RFQ. A proposal may be withdrawn in writing only, addressed to the County contact person for this Solicitation, prior to the proposal due date or upon the expiration of 180 calendar days after the opening of proposals. Thereafter, at any time during the term of this RFQ, a proposal may be withdrawn in writing only and shall be addressed to the County contact person for this Solicitation.

Proposers are hereby notified that all information submitted as part of, or in support of proposals will be available for public inspection after opening of proposals, in compliance with Chapter 119, Florida Statutes, popularly known as the "Public Records Law". The Proposer shall not submit any information in response to this Solicitation which the Proposer considers to be a trade secret, proprietary or confidential. The submission of any information to the County in connection with this Solicitation shall be deemed conclusively to be a waiver of any trade secret or other protection, which would otherwise be available to Proposer. In the event that the Proposer submits information to the County in violation of this restriction, either inadvertently or intentionally, and clearly identifies that information in the proposal as protected or confidential, the County may, in its sole discretion, either (a) communicate with the Proposer in writing in an effort to obtain the Proposer's written withdrawal of the confidentiality restriction or (b) endeavor to redact and return that information to the Proposer as quickly as possible, and if appropriate, evaluate the balance of the proposal. Under no circumstances shall the County request the withdrawal of the confidentiality restriction if such communication would in the County's sole discretion give to such Proposer a competitive advantage over other Proposers. The redaction or return of information pursuant to this clause may render a proposal non-responsive.

Any Proposer who, at the time of proposal submission, is involved in an ongoing bankruptcy as a debtor, or in a reorganization, liquidation, or dissolution proceeding, or if a trustee or receiver has been appointed over all or a substantial portion of the property of the Proposer under federal bankruptcy law or any state insolvency law, may be found non-responsive. To request

a copy of any ordinance, resolution and/or administrative order cited in this Solicitation, the Proposer must contact the Clerk of the Board at (305) 375-5126.

#### **1.4 Cone of Silence**

Pursuant to Section 2-11.1(t) of the Miami-Dade County Code, as amended, a "Cone of Silence" is imposed upon this RFQ after advertisement and terminates at the time a written list of pre-qualified contractors is issued pursuant to this RFQ. The Cone of Silence prohibits any communication regarding this RFQ between, among others:

- potential Proposers, service providers, lobbyists or consultants and the County's professional staff including, but not limited to, the County Manager and the County Manager's staff, the Mayor, County Commissioners or their respective staffs;
- the Mayor, County Commissioners or their respective staffs and the County's professional staff including, but not limited to, the County Manager and the County Manager's staff; or
- potential Proposers, service providers, lobbyists or consultants, any member of the County's professional staff, the Mayor, County Commissioners or their respective staffs **and** any member of the respective selection committee.

The provisions do not apply to, among other communications:

- 
- oral communications with the staff of the Vendor Assistance Unit, the responsible Procurement Agent or Contracting Officer, provided the communication is limited strictly to matters of process or procedure already contained in the solicitation document;
  - oral communications at pre-proposal conferences, oral presentations before selection committees, contract negotiations during any duly noticed public meeting, public presentations made to the Board of County Commissioners during any duly noticed public meeting; or
  - communications in writing at any time with any county employees, official or member of the Board of County Commissioners unless specifically prohibited by the applicable RFQ documents.

When the Cone of Silence is in effect, all potential vendors, service providers, bidders, lobbyists and consultants shall file a copy of any written correspondence concerning the particular RFQ with the Clerk of the Board, which shall be made available to any person upon request. The County shall respond in writing (if County deems a response necessary) and file a copy with the Clerk of the Board, which shall be made available to any person upon request. Written communications may be in the form of e-mail, with a copy to the Clerk of the Board at [clerkbcc@miamidade.gov](mailto:clerkbcc@miamidade.gov).

In the event a Request for Application (RFA) as indicated in Section 6.0, is issued with respect to any site, the Cone of Silence shall also apply in connection with said RFA.

#### **1.5 Public Entity Crimes**

Pursuant to Section 287.133(2)(a), Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal for a contract to provide any goods or services to a public entity; may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work; may not submit proposals on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and, may not transact business with any public entity in excess of the

threshold amount provided in Section 287.017, Florida Statutes, for Category Two (\$10,000) for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

**1.6 Lobbyist Contingency Fees**

A) In accordance with Section 2-11.1(s) of the Code of Miami-Dade County, after May, 16, 2003, no person may, in whole or in part, pay, give or agree to pay or give a contingency fee to another person. No person may, in whole or in part, receive or agree to receive a contingency fee.

B) A contingency fee is a fee, bonus, commission or non-monetary benefit as compensation which is dependent on or in any way contingent upon the passage, defeat, or modification of: 1) any ordinance, resolution, action or decision of the County Commission; 2) any action, decision or recommendation of the County Manager or any County board or committee; or 3) any action, decision or recommendation of any County personnel during the time period of the entire decision-making process regarding such action, decision or recommendation which foreseeably will be heard or reviewed by the County Commission or a County board or committee.

**1.7 Collusion**

Where two (2) or more related parties, as defined herein, each submit a proposal for any contract, such proposals shall be presumed to be collusive. The foregoing presumption may be rebutted by the presentation of evidence as to the extent of ownership, control and management of such related parties in preparation and submittal of such proposals. Related parties shall mean Proposer or the principals thereof which have a direct or indirect ownership interest in another Proposer for the same contract or in which a parent company or the principals thereof of one Proposer have a direct or indirect ownership interest in another Proposer for the same contract. Furthermore, any prior understanding, agreement, or connection between two or more corporations, firms, or persons submitting a proposal for the same services shall also be presumed to be collusive. Proposals found to be collusive shall be rejected. Proposers who have been found to have engaged in collusion may be considered non-responsible, and may be suspended or debarred, and any contract resulting from collusive bidding may be terminated for default.

**1.8 Expedited Purchasing Program**  
INTENTIONALLY BLANK

**1.9 Contract Measures**  
INTENTIONALLY BLANK

**1.10 Applicable State Statutes**  
Section 255.05, Fla. Stat.  
Section 255.20, Fla. Stat.  
Section 125.35, Fla. Stat.  
Section 125.38, Fla. Stat.

**1.11 Required Personnel**  
INTENTIONALLY BLANK

**1.12 Compliance with State and Federal Requirements**  
Selected Proposers shall comply with applicable state statutes for the Work to be completed assigned under contract with the County, including, but not limited to, compliance with Florida Statute 255.05 and 255.20. Additionally, the Selected Proposer shall comply with all applicable

federal laws, mixed-finance regulations, PIH notices, directives of HUD, and HUD's general conditions for construction, applicable professional standards, County orders, ordinances, rules and regulations which may pertain to this RFQ, including but not limited to:

- a) Executive Order 11246 "Equal Employment Opportunity", as amended by executive Order 11375 and as supplemented in Department of Labor regulations (41 CFR Chapter 60), as well as the Americans with Disabilities Act of 1990 and implementing regulations, the Rehabilitation Act of 1973, as amended, Chapter 553 of Florida Statutes and any and all other local, State and Federal directives, ordinances, rules, orders, and laws relating to people with disabilities..
- b) Miami-Dade County Florida, Department of Small Business Development Participation Provisions, as may be applicable.
- c) Environmental Protection Agency (EPA), as applicable to this RFQ.
- d) Miami-Dade County Code, Chapter 11A, Article 3. All contractors and subcontractors performing work in connection with this Contract shall provide equal opportunity for employment because of race, religion, color, age, sex, national origin, sexual orientation, disability, marital status or source of income. The aforesaid provision shall include, but not be limited to, the following: employment, upgrading, demotion or transfer, recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The Proposer agrees to post in conspicuous place available for employees and applicants for employment, such notices as may be required by the Dade County Fair Housing and Employment Commission, or other authority having jurisdiction over the work setting forth the provisions of the nondiscrimination law.
- e) "Conflicts of Interest" Section 2-11 of the County Code, and Ordinance 01-199.
- f) Miami-Dade County Code Section 10-38 "Debarment".
- g) Miami-Dade County Ordinance 99-5, codified at 11A-60 et. seq. of Miami-Dade Code pertaining to complying with the County's Domestic Leave Ordinance.
- h) Miami-Dade County Ordinance 99-152, prohibiting the presentation, maintenance, or prosecution of false or fraudulent claims against Miami-Dade County.
- i) The labor standards as set forth in the Davis-Bacon Act and other related acts, which are more fully described in General Conditions for Construction Contracts—Public Housing Programs, which is attached hereto as **Exhibit C**, and incorporated by reference, Section 46 of the General Conditions for Construction Contracts- Public Housing Program.
- j) The Copeland "Anti-Kickback" Act as supplemented in Department of Labor regulations (29 CFR Part 3).
- k) HUD's reporting requirements and regulations, as specified in the Grant Agreement and required of the Owner.
- l) Compliance with Executive Order 12549 "Debarment and Suspension", which stipulates that no contract(s) are "to be awarded at any tier to any party which is debarred or suspended or is otherwise excluded from or ineligible for participation in Federal assistance programs.

- m) Mandatory standards and policies related to energy efficiency which are contained in the State of Florida energy conservation plan issued in compliance with the Energy Policy and Conservation Act (Pub. L. 94-163, 89 Stat. 871).
- n) HUD procurement regulations as set forth in 24 C.F.R. Part 85 and 24 CFR Part 963 as further explained in HUD Handbook 7460.8 Rev. 1.
- o) Lead-Based Paint Poisoning Act (42 USC 4821, et. Seq.)
- p) The Fair Housing Act (42 U.S.C. 3601-19 and regulations pursuant thereto (24 CFR Part 100); Executive Order 11063 (Equal Opportunity in Housing) and regulations pursuant thereto (24 CFR Part 107); and the fair housing poster regulations (24 CFR Part 110).
- q) Title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d) and regulations pursuant thereto (24 CFR Part relating to non-discrimination in housing.
- r) The prohibitions against discrimination on the basis of age under the Age Discrimination Act of 1975 (42 U.S.C. 6101-07) and regulations issued pursuant thereto (24 CFR Part 146).
- ~~s) The prohibitions against discrimination on the basis of disability under Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794) and regulations issued pursuant thereto (24 CFR Part 8); the Americans with Disabilities Act and regulations pursuant thereto (28 CFR Part 36); and the Architectural Barriers Act of 1968, as amended, and regulations issued pursuant thereto (24 CFR Part 40).~~
- t) Executive Orders 11246, 11625, 12432, and 12138. Consistent with HUD's responsibilities under these orders, the Developer must make efforts to encourage the use of minority and, women's business enterprises in connection with funded activities.
- u) Section 102 of the Department of Housing and Urban Development Reform Act of 1989 and regulations issued pursuant thereto (24 CFR Part 4, Sub-Part A) which contain provisions designed to ensure greater accountability and integrity in the provision of certain types of assistance administered by HUD.
- v) 24 CFR Part 24 which applies to the employment, engagement of services, awarding of contracts, sub-grants, or funding of any recipients, or Developers or sub-Developers during any period of debarment, suspension, or placement in ineligibility status.
- w) All applicable federal regulations including but not limited to 24 C.F.R. part 990 and 24 C.F.R. part 965, subpart C, and applicable HUD Public and Indian Housing Notices, including but not limited to PIH 2009-16(HA).
- x) Section 3 of the Housing and Urban Development Act of 1968, as amended, 12 U.S.C. § 1701u (Section 3) and the implementing federal regulations.

1.13 **Rights of Protest**  
**INTENTIONALLY OMMITTED**

**END OF SECTION 1.0**

**2.0 DEVELOPER MINIMUM QUALIFICATIONS**

The County seeks developers with demonstrated experience, qualifications, capabilities, expertise, capacity and resources to develop County owned public housing sites. Developer minimum qualifications are:

- 1) Proposer must submit documentation for three developments that have obtained financing, are ongoing or have been completed within the last five years, including information as required in Section 3.0. For purposes of this requirement, the term "financing" shall mean a loan or other contractual commitment of funds specific to the project, issued by a lending institution, governmental entity or other entity not related directly or indirectly to the Proposer who is in the business of funding development projects.
- 2) Proposer must submit verifiable documentation as proof of its ability to obtain necessary local, state and federal approvals for development projects. Such documentation may be in the form of official records, certificates, approval forms, etc. from local, state and federal agencies indicating required approvals, as applicable, for affordable, sustainable and mixed-income and/or mixed-use housing development projects were obtained by or on behalf of the Proposer, including information as required in Section 3.0.
- 3) Proposer must demonstrate it has experience with the U.S. Department of Housing and Urban Development (HUD) requirements for development of affordable, sustainable and mixed-income and/or mixed-use housing development projects, and experience in working with HUD. Such proof may include documentation demonstrating that the Proposer has worked with HUD and obtained approval(s) evidencing compliance with applicable requirements for projects. Experience demonstrated should be of an ongoing nature, indicating that the Proposer understands and has demonstrated experience over several projects working with HUD, including information as required in Section 3.0.

**END OF SECTION 2.0**

### 3.0 RESPONSE REQUIREMENTS

#### 3.1 Submittal Requirements

In response to this Solicitation, Proposer should **return the documents as noted below**. Proposers should carefully follow the format and instructions outlined therein. All documents and information must be fully completed and signed as required. The proposal shall be written in sufficient detail to permit the County to conduct a meaningful evaluation of the required services. However, overly elaborate responses are not requested or desired.

#### 3.2 Proposer Information

Complete and submit the information requested in Section 3.5: Proposer Information.

Note: The Proposer Information document is available in an electronic format (Word) by submitting a written request via e-mail to the County contact person for this Solicitation.

#### 3.3 Form A-1, Cover Page of Proposal

Complete and sign (by Proposer or representative of the Proposer who is legally authorized to enter into a contractual relationship in the name of the Proposer) as required.

#### 3.4 Affidavits/Acknowledgements

Complete and sign the following forms:

Form A-2: Lobbyist Registration for Oral Presentations

Form A-3: Acknowledgement of Addenda

#### 3.5 Proposer Information

Submit the following information;

##### A. Proposer's Experience and Past Performance

1. Provide a cover letter, not to exceed five (5) pages, summarizing;

- a) Proposer's experience, qualification, capabilities, expertise, capacity and resources to a) finance, b) develop, and c) operate high quality affordable, sustainable and mixed-income and/or mixed-use housing developments.
- b) Proposer's ability to obtain necessary local, state and federal approvals for development projects.
- c) Proposer's experience with the U.S. Department of Housing and Urban Development (HUD) requirements for development projects and experience in working with HUD.
- d) Proposer's capability to obtain bonding and, insurance, and its financial capacity.
- e) The number of years that the Proposer has been in existence.
- f) The location of the main office, and other offices, if applicable.
- g) The current number of employees in each office.
- h) The primary markets served.
- i) The total number of units developed and corresponding total development costs.

- j) The total number of units developed and the corresponding total development costs for the last six years.
2. For the most recent and most comparable three (3) housing projects (completed or in progress within the last five (5) years) for which funding/financing has been secured, provide the following information:
- a) Table of organization (TO) indicating the development team.
  - b) the client and contact information (name, title, phone number and email)
  - c) project name
  - d) project location/address
  - e) a brief description of the work
  - f) developer's project manager
  - g) current project status (design, construction, etc.)
  - h) site acreage and density
  - i) total number of units, rental or homeownership and affordability type for each unit type (e.g. 30 - ACC rental units, 20 - affordable /tax credit rental units, 10 - market rate rental units, etc.)
  - j) unit types and numbers of each (e.g. 20 - 2-story walkup units, 30-townhouse units, etc.)
  - k) bedroom mix and number of each (e.g. 20 - 2-BR units, 30 - 3-BR units, etc.)
- 
- l) size and use of commercial or special purpose space (non-housing development, if applicable)
- 
- m) income groups served
  - n) total development costs and development cost per square foot.
  - o) total construction cost and construction cost per square foot
  - p) Amounts of participation in the project by owner including;
    - ground lease and/or other applicable agreement payments
    - percentage of net revenues
    - percentage of developer fee and total developer fee
    - reimbursement of owners administrative costs
    - any other participation by owner
  - q) dates covering the term of the contract,
  - r) notice to proceed (NTP) date
  - s) pre-construction activities duration (in months), construction duration (in months) and lease-up activities (in months)
  - t) financial closing date
  - u) substantial completion date
  - v) funding/financing sources and amounts for each received, contact names and phone numbers for all funding/financing sources
  - w) funding sources gaps (if applicable) and how these were funded
  - x) project pro-forma indicating all funding sources and uses.
  - y) community and supportive services provided (if applicable)
  - z) job training programs provided (if applicable)
  - aa) property manager (if different from developer, briefly explain relationship)
  - bb) architect(s)
  - cc) general contractor(s)
  - dd) in 8 1/2 x 11 format, provide a rendered site plan and

exterior renderings or photographs (no more than 3) depicting the design and general character of the project

3. All housing projects developed by Proposer within the last five (5) years and provide the following information:
  - a) Development name
  - b) Development address
  - c) Total development cost
  - d) Completion date (or current phase if not completed)
  
4. All contracts which the Proposer has performed or is performing for Miami-Dade County. The County will review all contracts the Proposer has performed for the County in accordance with Section 2-8.1(g) of the Miami-Dade County Code, which requires that "a Bidder's or Proposer's past performance on County Contracts be considered in the selection of Consultants and Contractors for future County Contracts." As such the Proposer must list and describe all work performed for Miami-Dade County and include for each project:
  - a) Name of the County Department which administers or administered the contract,
  - b) description of work,
  - c) total dollar value of the contract,
  - d) dates covering the term of the contract,
  - e) County contact person and phone number,
  - f) statement of whether Proposer was the prime contractor or subcontractor, and
  - g) the results of the project.

#### **B. Key Personnel for Developer**

1. In three pages or less, provide an organizational chart showing key personnel for the developer. Identify functions and duration of involvement by key personnel. Describe your management approach.
- (a) In three pages or less, list the names and addresses of development team personnel and briefly describe the experience, qualifications and other vital information, including relevant experience on previous similar projects.

**Note: After proposal submission, the Proposer has a continuing obligation to advise the County of any changes, intended or otherwise, to the key personnel identified in its proposal.**

#### **C. Management Experience**

1. Provide a maximum one-page narrative chronicling the developer's experience in overseeing the operation, management, maintenance, and financial reporting for all of its low-income rental buildings, with identification of family and senior developments.

#### **D. Resident Employment Small and Minority Business, Women's Business Enterprise and Labor Surplus Area Firms and Involvement Plan**

1. Provide a description not to exceed two pages of the Proposer's experience in providing resident employment opportunities and involvement by the community in addition to the Section 3 requirements noted herein on previous and recent projects.
2. Provide a description not to exceed two pages of the Proposer's experience in ensuring that, whenever possible, subcontracts are awarded to small business firms, minority firms, women's business enterprises, and labor surplus area firms. The description shall include the following elements:
  - (a) Proposer's plans to place qualified small and minority businesses and women's business enterprises on solicitation lists;
  - (b) Proposer's plans to ensure that small and minority businesses and women's business enterprises are solicited whenever they are potential sources;
  - (c) Proposer's plans to divide the total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses and women's business enterprises;
  - (d) Proposer's plans to establish delivery schedules, where the requirements of the contract permit, which encourage participation by small and minority businesses and women's business enterprises; and
  - (e) Proposer's plans to use the services and assistance of the U.S. Small Business Administration, the Minority Business Development Agency of the U.S. Department of Commerce, and State and local governmental small business agencies.

**E. Certifications and Representations of Offerors, form HUD-5369-A**

**Complete and sign one** form for the development firm.

**3.6 Proposal Submission Package**

Submit in hardcopy format an original, complete Proposal Submission Package and ten (10) copies of the complete package, as well as two (2) complete Proposal Submission Packages on two separate Compact Disks (CD: one complete proposal for each CD), **by the Proposal Due Date** (see front cover of Solicitation) in a sealed envelope/container addressed as follows:

Proposer's Name: Proposer's Address: Proposer's Telephone Number:  RFQ No: 794-A RFQ Title: Developer Qualifications Proposal Due Date: September 28, 2012	Clerk of the Board Stephen P. Clark Center 111 NW 1st Street, 17th Floor, Suite 202 Miami, FL 33128-1983
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**END OF SECTION 3.0**

**4.0 EVALUATION PROCESS**

**4.1 Review of Proposals for Responsiveness**

Each proposal will be reviewed to determine if the proposal is responsive to the submission requirements outlined in this Solicitation. A responsive proposal is one which follows the requirements of this Solicitation, includes all documentation, is submitted in the format outlined in this Solicitation, is of timely submission, and has the appropriate signatures as required on each document. Failure to comply with these requirements may result in the proposal being deemed non-responsive.

**4.2 Evaluation Criteria**

Proposals will be reviewed by an Evaluation/Selection Committee which will review all proposals received to determine if the Proposer meets the minimum qualification requirements set forth in Section 2.0 of this RFQ. The Evaluation/Selection Committee will be comprised of appropriate County personnel with the appropriate experience and/or knowledge, striving to ensure that the Evaluation/Selection Committee is balanced with regard to both ethnicity and gender.

**4.3 Oral Presentations**

**INTENTIONALLY OMITTED**

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**4.4 Selection Factors**

**INTENTIONALLY BLANK**

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**4.5 Local Certified Service-Disabled Veteran's Business Enterprise Preference**

**INTENTIONALLY BLANK**

**4.6 Local Preference**

**INTENTIONALLY BLANK**

**END OF SECTION 4.0**

**5.0 COUNTY TERMS AND CONDITIONS**

As a condition of contract award if any, a selected Proposer shall be required to enter into a master development agreement, ground lease and/or other contracts and agreements, which shall be negotiated with the selected Proposer. The terms and conditions summarized below are of special note.

**5.1 Vendor Registration**

Prior to being recommended for award, the Proposer shall complete a Miami-Dade County Vendor Registration Package. Effective June 1, 2008, the new Vendor Registration Package, including a Uniform Affidavit Packet (Affidavit form), must be completed. The Vendor Registration Package, including all affidavits can be obtained by downloading from the DPM website at [http://www.miamidade.gov/DPM/vendor\\_registration.asp](http://www.miamidade.gov/DPM/vendor_registration.asp) or from the Vendor Assistance Unit at 111 N.W. 1st Street, 13th Floor, Miami, FL. The recommended Proposer shall affirm that all information submitted with its Vendor Registration Package is current, complete and accurate, at the time they submitted a response to the Solicitation, by completing an Affirmation of Vendor Affidavit form.

**5.2 Insurance Requirements**

The Contractor shall furnish to the County, Internal Services - Procurement Management, prior to the commencement of any work under any agreement, Certificates(s) of Insurance which indicate insurance coverage has been obtained that meets the stated requirements.

**5.3 Payment and Performance Bond**

Upon request by the County and prior to the commencement of any work, the Contractor must deliver to the County executed Performance and Payment Bond on the prescribed form or in Cash. The Surety Performance and Payment Bond shall be in the amount of 100% of the agreement amount, as security for the faithful performance of the agreement and for the payment of all persons performing labor or furnishing materials in connection therewith. If Cash is used in lieu of the bonds, all terms and conditions stipulated in the bonds shall be just as applicable. The Performance and Payment Bonds shall have as the surety thereon only such surety company or companies as are acceptable to the County and are authorized to write bonds of such character and amount in accordance with the following qualifications:

- (a) All bonds shall be written through surety insurers authorized to do business in the State of Florida as surety, with the following qualifications as to management and financial strength according to the latest edition of Best's Insurance Guide, published by A.M. Best Company, Oldwick, New Jersey:

<u>Bond Amount</u>	<u>Best Rating</u>
i. 500,001 to 1,500,000	B V
ii. 1,500,001 to 2,500,000	A VI
iii. 2,500,001 to 5,000,000	A VII
iv. 5,000,001 to 10,000,000	A VIII
v. Over 10,000,000	A IX

- (b) On contract amounts of 500,000 or less, the bond provisions of Section 287.0935, Florida Statutes shall be in effect and surety companies not otherwise qualifying with this paragraph may optionally qualify by:

- i. Providing evidence that the Surety has twice the minimum surplus and capital required by the Florida Insurance Code at the time the invitation to bid is issued.
  - ii. Certifying that the Surety is otherwise in compliance with the Florida Insurance Code, and;
  - iii. Providing a copy of the currently valid Certificate of Authority issued by the United States Department of the Treasury under ss. 31 U.S.C. §§ 9304-9308.
- (c) Surety Insurers shall be listed in the latest Circular 570 of the U.S. Department of the Treasury entitled "Surety Companies Acceptable on Federal Bonds", published annually. The bond amount shall not exceed the underwriting limitations as shown in this circular.
- (d) For contracts in excess of 500,000 the provision of Section (b) will be adhered to plus the company must have been listed for at least three consecutive years, or holding a valid Certificate of Authority of at least 1.5 million dollars and on the Treasury List.
- 
- (e) Surety Bonds guaranteed through U.S. Government Small Business Administration or Developers Training and Development Inc. will also be acceptable.
- (f) The attorney-in-fact or other officer who signs performance and payment bonds for a surety company must file with such bond a certified copy of his power of attorney authorizing him to do so. The performance and payment bonds must be counter signed by the surety's resident Florida agent.

The Performance Bond or Cash used in lieu of the Performance Bond shall remain in force for one (1) year from the date of final acceptance of the work to protect the County against losses resulting from defects in materials or improper performance of work under the Agreement; provided however, that this limitation does not apply to suits seeking damages for latent defects in materials or workmanship, such actions being subject to the limitations found in Section 95.11(3)(c), Florida Statutes.

#### **5.4 Inspector General Reviews**

According to Section 2-1076 of the Code of Miami-Dade County, as amended by Ordinance No. 99-63, Miami-Dade County has established the Office of the Inspector General which may, on a random basis, perform audits on all County contracts, throughout the duration of said contracts, except as otherwise indicated.

#### **5.5. Form HUD-5370, General Conditions of the Contract for Construction.**

The Contractor shall comply with all terms and conditions set forth in the General Conditions of the Contract for Construction.

**END OF SECTION 5.0**

**6.0 SITE APPLICATION(S), DEVELOPMENT GOALS AND COMPLIANCE****6.1 Site Application(s):**

Subsequent to establishing the pre-qualified developer pool (qualified proposers) and as a separate process, the County, through Public Housing and Community Development (PHCD), intends to issue Request for Applications (RFA's) to qualified proposers requesting applications for development of particular County public housing sites. PHCD may receive, evaluate, and negotiate RFA applications from interested qualified proposers for development of County owned public housing sites. The County will submit recommendations to the Board of County Commissioners (Board) resulting from the RFA process. Additional and more detailed information will be provided in the Request for Application (RFA) document. The following is representative of the County's goals, requirements, and type of information that may be requested in any RFA issued by PHCD.

**6.2 The County's Development Goals**

- The County's primary goal is to substantially rehabilitate its existing developments and/or increase the supply of affordable, quality housing for residents. The County seeks to match experienced developers with properties that can meet this objective.
- The County seeks to participate in any revenue or income streams produced by the new development. This may include, but is not limited to, ground lease payments, net revenues, developer fees, reimbursement of PHCD's and administrative expenses (calculated at 2% of total development cost) and other sources as may be provided by developers.
- The County seeks to provide employment opportunities for very low, low, and moderate income residents housed in the development areas, and improve the quality of life through the development of PHCD sites.
- The County seeks to rehabilitate/upgrade existing public housing units, remove and replace obsolete public housing units, increase the number of units on its under-utilized sites and permit commercial and other special purpose uses where appropriate. PHCD also seeks to replace its older units with new designs that resemble market-rate units (regardless of whether these are public housing, affordable or market rate units) and incorporate creative and sustainable design solutions.
- The County seeks to maximize the development potential of existing public housing sites and provide a financial return to PHCD.

**6.3 Development Methodology and Developer Compliance**

The County is interested in using the mixed-income and mixed-finance approach to development, which is authorized by the federal regulations governing the County's housing programs, such as public housing. The mixed-income and mixed-finance approach to the development of public housing has dramatically changed the manner in which public housing authorities (PHA) can deliver public housing units. This approach: (1) permits development of projects which include both non-public housing units and public housing units; (2) permits PHCD to enter into partnership arrangements with non-profit and private developers to own mixed-income and mixed-finance developments; (3) permits private, third party management of mixed-income and mixed-finance developments; and (4) permits PHCD to assign operating and capital subsidies to such properties.

This mixed-income and mixed-finance approach also encourages the leveraging of public housing financial resources with other private and public funds. There is more flexibility in funding mixed-finance projects, as well as in mixing unit types, so that developments may include mixed-income residents, with "affordable" and market-rate units along with public housing units. To this end, the County, as a PHA, is seeking developers who can successfully apply and compete for available financing opportunities from local, state and federal sources.

The United States Department of Housing and Urban Development (HUD) has encouraged PHAs to approach the development of new units in as entrepreneurial a manner as possible. PHCD has demonstrated the willingness, and the capacity, to plan mixed-income developments, and to execute mixed finance transactions.

Developers may be non-profit (including faith-based) or, for-profit entities, for development and ownership purposes. The dwelling units, commercial spaces or special purpose facilities may be sold (subject to a ground lease and/or other agreement), or rented. Miami-Dade County will retain ownership of the land and may participate in the partnership that owns the improvements, and expects to share in any revenue generated by new development.

**Section 3 Compliance:** The work to be performed under this contract is subject to the requirements of Section 3 of the Housing and Urban Development Act of 1968, as amended, 12 U.S.C. § 1701u (Section 3) and the implementing federal regulations. The purpose of Section 3 is to ensure that the employment and other economic opportunities generated by HUD assistance of HUD-assisted projects covered by Section 3, shall, to the greatest extent feasible, be directed to low and very low income persons, particularly persons who are recipients of HUD assistance for housing. **A Proposer must be S-3 certified by the PHCD at least two weeks prior to the proposal due date and must comply with the requirements of Attachment 2, Document 00200-B, Section 3 Business Preference Claim Form to qualify for the preference.**

#### **6.4 Rights of Protest** INTENTIONALLY OMITTED

#### **6.5 Section 3 of the HUD Act of 1968**

Proposer application evaluation includes criteria for Section 3 (S-3) of the HUD Act of 1968 business concerns as indicated in the Section 4.2(5) herein. The Acceptability of Section 3 Compliance Strategy (Section 4.2(4)(a)) portion of the proposal will be evaluated subjectively, including the Proposer's response to **Exhibit E: Document 00400, Section 3 Economic Opportunity and Affirmative Marketing Plan**. The Section 3 Preference (Section 4.2(4)(b)) full 5 points will be afforded to S-3 Proposers who qualify for the preference. A Proposer must be S-3 certified by the PHCD at least two weeks prior to the proposal due date and must comply with the requirements of Document 00200-B, Section 3 Business Preference Claim Form to qualify for the preference.

Refer to the PHCD Section 3 of the HUD Act of 1968 Guidelines which are attached in **Exhibit E**. The S-3 Business application is available at <http://www.miamidade.gov/housing/section3.asp> or by e-mail request to the PHCD Section 3 Coordinator, at [section3@miamidade.gov](mailto:section3@miamidade.gov).

#### **6.6 Qualified Proposer(s) Documentation**

Qualified Proposer(s) may be required to provide to the County:

A. Its most recent certified business financial statements as of a date not earlier than the end of the Proposer's preceding official tax accounting period, together with a statement in writing, signed by a duly authorized representative, stating that the present financial condition is materially the same as that shown on the balance sheet and income statement submitted, or with an explanation for a material change in the financial condition. A copy of the most recent business income tax return will be accepted if certified financial statements are unavailable.

B. Information concerning any prior or pending litigation, either civil or criminal, involving a governmental agency, including but not limited against Miami-Dade County, or which may affect the performance of the services to be rendered herein, in which the Proposer, any of its employees or consultants is or has been involved within the last three years.

**END OF SECTION 6.0**

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**7.0 COUNTY FORMS (TO BE SUBMITTED WITH THIS RFQ FOR PRE-QUALIFICATION)**

**Form A-1**

**Form A-2     Affidavit of Miami-Dade County Lobbyist Registration for Oral Presentation**

**Form A-3     Acknowledgement of Addenda**

**8.0 ATTACHMENTS**

**Attachment B: Form HUD 5369-C: Certifications and Representations of Offerors,  
Non-Construction**

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<b>PROPOSER'S NAME (Name of firm, entity or organization):</b>		
<b>FEDERAL EMPLOYER IDENTIFICATION NUMBER:</b>		
<b>NAME AND TITLE OF PROPOSER'S CONTACT PERSON:</b>		
Name: _____		Title: _____
<b>MAILING ADDRESS:</b>		
Street Address: _____		
City, State, Zip: _____		
<b>TELEPHONE:</b> ( ) _____	<b>FAX:</b> ( ) _____	<b>E-MAIL ADDRESS:</b> _____
<b>PROPOSER'S ORGANIZATIONAL STRUCTURE:</b>		
<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Proprietorship <input type="checkbox"/> Joint Venture <input type="checkbox"/> Other (Explain): _____		
<b>IF CORPORATION:</b>		
Date Incorporated/Organized: _____		State Incorporated/Organized: _____
States registered in as foreign corporation: _____		
<b>PROPOSER'S SERVICE OR BUSINESS ACTIVITIES OTHER THAN WHAT THIS SOLICITATION REQUESTS FOR:</b>		
<b>LIST NAMES OF PROPOSER'S SUBCONTRACTORS OR SUBCONSULTANTS FOR THIS PROJECT:</b>		
<b>LOCAL CERTIFIED SERVICE-DISABLED VETERAN BUSINESS ENTERPRISE:</b>		
A Local Certified Service-Disabled Veteran Business Enterprise is a firm that is a) a local business pursuant to Section 2-8.5 of the Code of Miami-Dade County and b) prior to proposal submittal is certified by the State of Florida Department of Management Services as a service-disabled veteran business enterprise pursuant to Section 295.187 of the Florida Statutes. At the time of proposal submission, the Local Certified Service-Disabled Veteran Business Enterprise must affirm in writing its compliance with the certification requirements of Section 295.187 of the Florida Statutes and submit said affirmation and a copy of the actual certification along with the proposal submission.		
<input type="checkbox"/> Place a checkmark here only if affirming Proposer is a certified Local Certified Service-Disabled Veteran Business Enterprise. A copy of the required certification must be submitted with the proposal.		
<b>CRIMINAL CONVICTION DISCLOSURE:</b>		
Pursuant to Miami-Dade County Ordinance No. 94-34, any individual who has been convicted of a felony during the past ten years and any corporation, partnership, joint venture or other legal entity having an officer, director, or executive who has been convicted of a felony during the past ten years shall disclose this information prior to entering into a contract with or receiving funding from the County.		
<input type="checkbox"/> Place a checkmark here <u>only</u> if Proposer has such conviction to disclose.		
<b>Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List:</b>		
By executing this proposal through a duly authorized representative, the proposer certifies that the proposer is not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, as those terms are used and defined in sections 287.135 and 215.473 of the Florida Statutes. In the event that the proposer is unable to provide such certification but still seeks to be considered for award of this solicitation, the proposer shall execute the proposal through a duly authorized representative and shall also initial this space: _____. In such event, the proposer shall furnish together with its proposal a duly executed written explanation of the facts supporting any exception to the requirement for certification that it claims under Section 287.135 of the Florida Statutes. The proposer agrees to cooperate fully with the County in any investigation undertaken by the County to determine whether the claimed exception would be applicable. The County shall have the right to terminate any contract resulting from this solicitation for default if the proposer is found to have submitted a false certification or to have been placed on the Scrutinized Companies for Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.		

**PROPOSER'S AUTHORIZED SIGNATURE**

The undersigned hereby certifies that this proposal is submitted in response to this solicitation.

**THE EXECUTION OF THIS FORM CONSTITUTES THE UNEQUIVOCAL OFFER OF PROPOSER TO BE BOUND BY THE TERMS OF ITS PROPOSAL. FAILURE TO SIGN THIS SOLICITATION WHERE INDICATED BELOW BY AN AUTHORIZED REPRESENTATIVE SHALL RENDER THE PROPOSAL NON-RESPONSIVE. THE COUNTY MAY, HOWEVER, IN ITS SOLE DISCRETION, ACCEPT ANY PROPOSAL THAT INCLUDES AN EXECUTED DOCUMENT WHICH UNEQUIVOCALLY BINDS THE PROPOSER TO THE TERMS OF ITS OFFER.**

Signed By: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

A-1 Rev. 7/29/11

Form A-2
AFFIDAVIT OF MIAMI-DADE COUNTY
LOBBYIST REGISTRATION FOR ORAL PRESENTATION

(1) Project Title: \_\_\_\_\_ Project No.: \_\_\_\_\_
(2) Department: \_\_\_\_\_
(3) Proposer's Name: \_\_\_\_\_
Address: \_\_\_\_\_ Zip: \_\_\_\_\_
Business Telephone: (\_\_\_\_) \_\_\_\_\_

(4) List All Members of the Presentation Team Who Will Be Participating in the Oral Presentation:

Table with 4 columns: NAME, TITLE, EMPLOYED BY, TEL. NO. Multiple rows for listing team members.

(ATTACH ADDITIONAL SHEET IF NECESSARY)

The individuals named above are Registered and the Registration Fee is not required for the Oral Presentation ONLY.

Any person who appears as a representative for an individual or firm for an oral presentation before a County certification, evaluation, selection, technical review or similar committee must be listed on an affidavit provided by the County. The affidavit shall be filed with the Clerk of the Board at the time the response is submitted. The individual or firm must submit a revised affidavit for additional team members added after submittal of the proposal with the Clerk of the Board prior to the oral presentation. Any person not listed on the affidavit or revised affidavit may not participate in the oral presentation, unless he or she is registered with the Clerk's office and has paid all applicable fees.

Other than for the oral presentation, Proposers who wish to address the county commission, county board or county committee concerning any actions, decisions or recommendations of County personnel regarding this solicitation in accordance with Section 2-11.1(s) of the Code of Miami-Dade County MUST register with the Clerk of the Board and pay all applicable fees.

I do solemnly swear that all the foregoing facts are true and correct and I have read or am familiar with the provisions of Section 2-11.1(s) of the Code of Miami-Dade County as amended.

Signature of Authorized Representative: \_\_\_\_\_ Title: \_\_\_\_\_
STATE OF \_\_\_\_\_
COUNTY OF \_\_\_\_\_

The foregoing instrument was acknowledged before me this \_\_\_\_\_,
by \_\_\_\_\_, a \_\_\_\_\_, who is personally known
(Individual, Officer, Partner or Agent) (Sole Proprietor, Corporation or Partnership)
to me or who has produced \_\_\_\_\_ as identification and who did/did not take an oath.

(Signature of person taking acknowledgement)
(Name of Acknowledger typed, printed or stamped)
(Title or Rank) (Serial Number, if any)

Form A-3  
**ACKNOWLEDGEMENT OF ADDENDA**

**Instructions:** Complete Part I or Part II, whichever is applicable.

**PART I:** Listed below are the dates of issue for each Addendum received in connection with this solicitation.

Addendum #1, Dated \_\_\_\_\_, 201\_\_

Addendum #2, Dated \_\_\_\_\_, 201\_\_

Addendum #3, Dated \_\_\_\_\_, 201\_\_

Addendum #4, Dated \_\_\_\_\_, 201\_\_

Addendum #5, Dated \_\_\_\_\_, 201\_\_

Addendum #6, Dated \_\_\_\_\_, 201\_\_

Addendum #7, Dated \_\_\_\_\_, 201\_\_

Addendum #8, Dated \_\_\_\_\_, 201\_\_

Addendum #9, Dated \_\_\_\_\_, 201\_\_

**PART II:**

\_\_\_\_\_ No Addendum was received in connection with this solicitation.

Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

Firm Name: \_\_\_\_\_

Attachment B: Form HUD 5369-C: Certifications and Representations of Offerors, Non-Construction

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

Certifications and Representations of Offerors  
Non-Construction Contract

Public reporting burden for this collection of information is estimated to average 5 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information.

This form includes clauses required by OMB's common rule on bidding/offering procedures, implemented by HUD in 24 CFR 85.36, and those requirements set forth in Executive Order 11625 for small, minority, women-owned businesses, and certifications for independent price determination, and conflict of interest. The form is required for nonconstruction contracts awarded by Housing Agencies (HAs). The form is used by bidders/offerors to certify to the HA's Contracting Officer for contract compliance. If the form were not used, HAs would be unable to enforce their contracts. Responses to the collection of information are required to obtain a benefit or to retain a benefit. The information requested does not lend itself to confidentiality.

1. Contingent Fee Representation and Agreement

(a) The bidder/offeror represents and certifies as part of its bid/offer that, except for full-time bona fide employees working solely for the bidder/offeror, the bidder/offeror:

- (1) [ ] has, [ ] has not employed or retained any person or company to solicit or obtain this contract; and
(2) [ ] has, [ ] has not paid or agreed to pay to any person or company employed or retained to solicit or obtain this contract any commission, percentage, brokerage, or other fee contingent upon or resulting from the award of this contract.

(b) If the answer to either (a)(1) or (a) (2) above is affirmative, the bidder/offeror shall make an immediate and full written disclosure to the PHA Contracting Officer.

(c) Any misrepresentation by the bidder/offeror shall give the PHA the right to (1) terminate the resultant contract; (2) at its discretion, to deduct from contract payments the amount of any commission, percentage, brokerage, or other contingent fee; or (3) take other remedy pursuant to the contract.

2. Small, Minority, Women-Owned Business Concern Representation

The bidder/offeror represents and certifies as part of its bid/offer that it:

- (a) [ ] is, [ ] is not a small business concern. "Small business concern," as used in this provision, means a concern, including its affiliates, that is independently owned and operated, not dominant in the field of operation in which it is bidding, and qualified as a small business under the criteria and size standards in 13 CFR 121.
(b) [ ] is, [ ] is not a women-owned small business concern. "Women-owned," as used in this provision, means a small business that is at least 51 percent owned by a woman or women who are U.S. citizens and who also control and operate the business.
(c) [ ] is, [ ] is not a minority enterprise which, pursuant to Executive Order 11625, is defined as a business which is at least 51 percent owned by one or more minority group members or, in the case of a publicly owned business, at least 51 percent of its voting stock is owned by one or more minority group members, and whose management and daily operations are controlled by one or more such individuals.

For the purpose of this definition, minority group members are:

(Check the block applicable to you)

- [ ] Black Americans [ ] Asian Pacific Americans
[ ] Hispanic Americans [ ] Asian Indian Americans
[ ] Native Americans [ ] Hasidic Jewish Americans

3. Certificate of Independent Price Determination

(a) The bidder/offeror certifies that—

- (1) The prices in this bid/offer have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder/offeror or competitor relating to (i) those prices, (ii) the intention to submit a bid/offer, or (iii) the methods or factors used to calculate the prices offered;
(2) The prices in this bid/offer have not been and will not be knowingly disclosed by the bidder/offeror, directly or indirectly, to any other bidder/offeror or competitor before bid opening (in the case of a sealed bid solicitation) or contract award (in the case of a negotiated solicitation) unless otherwise required by law; and
(3) No attempt has been made or will be made by the bidder/offeror to induce any other concern to submit or not to submit a bid/offer for the purpose of restricting competition.

(b) Each signature on the bid/offer is considered to be a certification by the signatory that the signatory:

- (1) Is the person in the bidder/offeror's organization responsible for determining the prices being offered in this bid or proposal, and that the signatory has not participated and will not participate in any action contrary to subparagraphs (a)(1) through (a)(3) above; or
(2) (i) Has been authorized, in writing, to act as agent for the following principals in certifying that those principals have not participated, and will not participate in any action contrary to subparagraphs (a)(1) through (a)(3) above (insert full name of person(s) in the bidder/offeror's organization responsible for determining the prices offered in this bid or proposal, and the title of his or her position in the bidder/offeror's organization);
(ii) As an authorized agent, does certify that the principals named in subdivision (b)(2)(i) above have not participated, and will not participate, in any action contrary to subparagraphs (a)(1) through (a)(3) above; and

(iii) As an agent, has not personally participated, and will not participate in any action contrary to subparagraphs (a)(1) through (a)(3) above.

(c) If the bidder/offeror deletes or modifies subparagraph (a)2 above, the bidder/offeror must furnish with its bid/offer a signed statement setting forth in detail the circumstances of the disclosure.

#### 4. Organizational Conflicts of Interest Certification

(a) The Contractor warrants that to the best of its knowledge and belief and except as otherwise disclosed, it does not have any organizational conflict of interest which is defined as a situation in which the nature of work under a proposed contract and a prospective contractor's organizational, financial, contractual or other interest are such that:

(i) Award of the contract may result in an unfair competitive advantage;

(ii) The Contractor's objectivity in performing the contract work may be impaired; or

(iii) That the Contractor has disclosed all relevant information and requested the HA to make a determination with respect to this Contract.

(b) The Contractor agrees that if after award he or she discovers an organizational conflict of interest with respect to this contract, he or she shall make an immediate and full disclosure in writing to the HA which shall include a description of the action which the Contractor has taken or intends to eliminate or neutralize the conflict. The HA may, however, terminate the Contract for the convenience of HA if it would be in the best interest of HA.

(c) In the event the Contractor was aware of an organizational conflict of interest before the award of this Contract and intentionally did not disclose the conflict to the HA, the HA may terminate the Contract for default.

(d) The Contractor shall require a disclosure or representation from subcontractors and consultants who may be in a position to influence the advice or assistance rendered to the HA and shall include any necessary provisions to eliminate or neutralize conflicts of interest in consultant agreements or subcontracts involving performance or work under this Contract.

#### 5. Authorized Negotiators (RFPs only)

The offeror represents that the following persons are authorized to negotiate on its behalf with the PHA in connection with this request for proposals: (list names, titles, and telephone numbers of the authorized negotiators):

#### 6. Conflict of Interest

In the absence of any actual or apparent conflict, the offeror, by submission of a proposal, hereby warrants that to the best of its knowledge and belief, no actual or apparent conflict of interest exists with regard to my possible performance of this procurement, as described in the clause in this solicitation titled "Organizational Conflict of Interest."

#### 7. Offeror's Signature

The offeror hereby certifies that the information contained in these certifications and representations is accurate, complete, and current.

\_\_\_\_\_  
Signature & Date:

\_\_\_\_\_  
Typed or Printed Name:

\_\_\_\_\_  
Title:



Procurement Management  
111 NW 1st Street • Suite 1300  
Miami, Florida 33128-1974  
T 305-375-5289 F 305-375-4407 305-372-6128

miamidade.gov

### ADDENDUM NO. 1

DATE: October 15, 2012  
TO: ALL PROSPECTIVE PROPOSERS  
SUBJECT: Developer Qualifications – RFQ 794A

This addendum becomes a part of the subject Request for Qualifications (RFQ).

**NOTE:** RFQ 794A can be downloaded from the following site:

<https://www.miamidade.gov/DPMwww/SolicitationList.aspx>

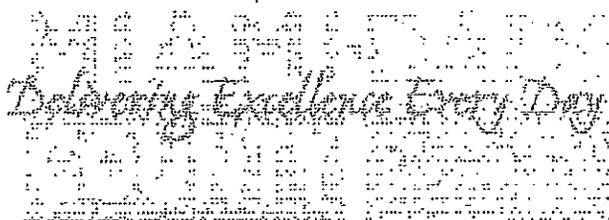
Attendance sheets are provided from the October 12, 2012 Pre-proposal Conference.

All other information remains the same.

Fred Simmons, Jr. CPPO  
Senior Procurement Contracting Officer

Cc: Clerk of the Board  
Terrence Smith, Assistant County Attorney

CLERK OF THE BOARD  
2012 OCT 15 PM 3:30  
COUNTY OF MIAMI, FLA.





# ATTENDANCE SHEET

RFP NUMBER: RFP 794A, Developer Qualifications

LOCATION: SPCC, 111 NW 1st Street, 18th Floor, 18-3

PURPOSE: Pre-Proposal Conference

DATE: 10/12/12

Completing this attendance sheet is optional.

NAME	COMPANY	ADDRESS	PHONE	E-MAIL
Joe Chinkov	Michels/5 Del	3 E 5th RD, Suite 100, Marking Pkwy, #341-4550	(305) 440-9400	jchinkov@Michels.com
Yosun Goldfarb	Relatood Urban	315 S. Biscayne Blvd. #2055	(305) 440-9400	goldfarb@relatood.com
Elena Adames	HTG	3025 AVIATION AVE STE 602	(305) 860-8188	elena@HTG.com
Stann Wilson	Blue Sky	5300 W. Cypress, Ste 400	(305) 301-3132	swilson@bluesky.com
Chris Peterson	Callidie	2450 SW 27th Ave, Ste. 200	(305) 474-0118	chris@callidie.com
JAMES PETERAUE	AREFORM	1398 SW 15th St Miami, FL 33135	(305) 371-7600	jpeteraue@areform.com
Kristin Ober	MCN	6201 SW 75th Street Miami, FL 33143	(305) 541-0000	kober@mcncorp.com
Janice Oleser			(305) 477-1300	janice@oleser.com
Charles Sims	Wm Urban Developm	8500 NW 25 Avenue Miami, FL 33147	(305) 676-4450	csims@wurban.com
HANNA ESKOJA	GOLMAN & CO	700 N. MAIN ST STE 53578	(305) 618-5810	hanna@eskoja.com
Robert Saland	Landmark	1666 Kennedy Parking #505	(305) 538-9552	robert@landmark.com
Oliver Pfeffer	Landmark	N. Bay Village Fl 33141	( )	oliver@landmark.com
CAMILIA OSORIO	PSI	7150 NW 6TH ST MIAMI 33146	(305) 687-3196	camila.osorio@psi.com
TERESE SALVENDY	URGENT, INC	1000 SW 1st Ave, Suite 100 Miami, FL 33136	(786) 436-1544	teres@urgentinc.com
JOSE A. RODRIGUEZ	PHCD	701 NW 1ST 16FL, 33136	(786) 469-4120	jrdriguez@phcd.com
David Deutch	TriMude Housing	9400 S. Palmdale Blvd #100	(305) 854-7100	david@trimudehousing.com

Rev. 10/18/99

Miami, FL 33136





Carlos A. Gimenez, Mayor

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ADDENDUM NO. 2

DATE: October 18, 2012
TO: ALL PROSPECTIVE PROPOSERS
SUBJECT: Request for Qualifications No. 794A: Developer Qualifications

This addendum becomes a part of the subject Request for Qualifications.

Questions and Answers:

- 1. On page 11 of RFQ 794A, Section 3.5 A.1 says not to exceed 5 pages, please clarify that the 5 pages is only in reference to question A.1.

Answer: Yes

- 2. On page 13 of RFQ 794A, Section 3.5 B.1 (a) when you reference "development team personnel" are you referring to the Architect, Engineer, etc.?

Answer: Yes, if these individuals will be part of the team that will develop sites if awarded to you.

All other information remains the same.

Fred Simmons, Jr. CPPO
Senior Procurement Contracting Officer
Cc: Clerk of the Board
Terrence Smith, Assistant County Attorney

CLERK OF THE BOARD
2012 OCT 18 AM 8:44
COUNTY OF MIAMI, FLA.