

City of Madison
Community Development Division
Suite 800, 30 W. Mifflin St.,
Madison, WI 53703-2579



DRAFT

REQUEST FOR PROPOSALS

RFP #XXXX-2018

**Affordable Housing Fund:
Developers Seeking 2019 WHEDA Tax Credits
for Rental Housing Development**

Release Date: May XX, 2018

**Due Date: 12:00 p.m., NOON
Xxxxday, June XX, 2018**

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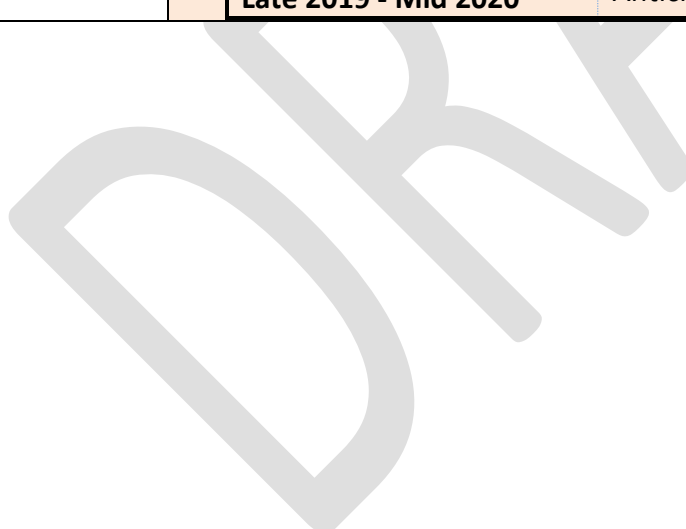
RFP SUMMARY

RFP NUMBER	RFP # XXXX-2018
RFP TITLE	Affordable Housing Fund: Developers Seeking 2019 WHEDA Tax Credits for Rental Housing Development
DEADLINE FOR BID SUBMISSIONS	12:00 P.M. (NOON) CDT, XXXXday, June XX, 2018 Proposals received after the deadline will not be considered.
SCOPE	<p>The City of Madison Community Development Division (CDD) is seeking to improve the competitiveness of development proposals submitted to WHEDA and maximize the receipt of tax credits for projects in Madison through proposals from qualified developers that seek to accomplish the following three objectives:</p> <ol style="list-style-type: none"> 1. Increase the supply of safe, quality, affordable rental housing. 2. Preserve existing income- and rent-restricted rental housing to ensure long-term affordability and sustainability. 3. Improve the existing rental housing stock in targeted neighborhoods through acquisition/rehab to create long-term affordability and sustainability.
FUNDS AVAILABLE:	The CDD anticipates having at least \$3 million available from the City's Affordable Housing Fund to support 2-3 proposals through this process.
APPLICATION FORM AND GUIDELINES	Available at: Community Development Division Funding Opportunities Website
E-MAIL PROPOSAL TO:	<p>CDDapplications@cityofmadison.com</p> <p>All proposals must be submitted electronically via email in the Word and Excel Workbook documents provided. Please put Affordable Housing Fund in email subject line.</p>
DIRECT ALL INQUIRES TO:	<p>Julie Spears, Community Development Specialist jspears@cityofmadison.com 608-267-1983</p> <p>Linette Rhodes, Community Development Supervisor (Interim) lrhodes@cityofmadison.com 608-261-9240</p>

RFP CALENDAR

These dates represent the City’s desired timeline for providing a commitment of funds to selected projects. Any revision to the due date for submission of proposals will be made by addendum. All other dates are for planning purposes and may be adjusted without notice, as needs and circumstances dictate.

Date	RFP Activity
May XX, 2018	Release of RFP
12:00 p.m. NOON (CST) June XX, 2018	DEADLINE FOR SUBMISSION OF PROPOSALS
Week of July 16, 2018	CDD requests additional/clarifying information from applicants, if necessary.
Week of July 30, 2018	Applicants respond to request for additional/clarifying information
Week of August 6, 2018	Applicant Presentations to Staff
October 4, 2018	Applicant Presentations to CDBG Committee
October 9, 2018	Finance Committee Approval
October 16, 2018	Common Council Approval
November 2018	Commitment Letter (Notification of Award)
Late 2019 - Mid 2020	Anticipated contract effective date(s)



SECTION 1: SCOPE OF WORK

1.1 Introduction

The City of Madison (City) Community Development Division (CDD) is seeking proposals from developers that would utilize the City's Affordable Housing Fund (AHF) to leverage 2019 Low-Income Housing Tax Credits (LIHTC) administered by the Wisconsin Housing and Economic Development Authority (WHEDA) for projects that will expand, preserve, or improve the supply of affordable rental housing in Madison, with an emphasis on the primary objective of increasing supply.

1.2 Goals and Objectives

The goal of the Affordable Housing Initiative is to improve the competitiveness of development proposals submitted to WHEDA and maximize the receipt of tax credits for projects in Madison that seek to accomplish the following three objectives:

1. Increase the supply of safe, quality, affordable rental housing.
2. Preserve existing income- and rent-restricted rental housing to ensure long-term affordability and sustainability.
3. Improve the existing rental housing stock in targeted neighborhoods through acquisition/rehab to create long-term affordability and sustainability.

In addition to these primary objectives, the Affordable Housing Initiative aims to:

- Achieve a wider dispersion of affordable rental housing throughout the city and discourage development of additional supply of income- and rent-restricted units in areas with high concentrations of poverty and/or assisted housing.
- Incentivize new development in areas of the city with strong connections with or proximity to key amenities such as employment opportunities, public transit, a full service grocery store, health facilities, schools, parks, and other basic amenities.
- Align CDD-assisted development and property management practices with the City's Racial Equity and Social Justice Initiative through inclusive and culturally-sensitive marketing.

1.3 Funding Availability

CDD anticipates having at least \$3 million available from the City's Affordable Housing Fund to support 2-3 proposals through this Request for Proposals (RFP) process. The City's primary objective is to add 160-200 units to the supply of affordable rental housing in Madison. Additional funds may become available pending the progress of projects previously awarded AHF funds. At its discretion, and in consultation with applicants, the City may also opt to draw from other City-administered sources (including CDBG, HOME, EECBG) in order to maximize its capacity to support development proposals. Projects proposed

within active tax increment financing (TIF) districts may also qualify for assistance from that resource, which is managed by the City's Economic Development Division (EDD). City staff will work to coordinate the award of multiple sources City financial assistance where applicable.

Assistance offered from City Affordable Housing Funds will be contingent upon their authorization during the 2019 Budget process, which concludes in November of 2018. All funding awards offered to a project by the City are made contingent upon an applicant's receipt of LIHTC for that project, as well as the applicant's ability to secure other financing necessary for the project, and land use and permit approvals.

Funds awarded through this RFP are expected to be secured by a Loan Agreement by December 31, 2020. Payment Schedule will be negotiated at point of contract with 10% of funds reserved until project completion.

1.4 Financing Amounts and Terms

Based on previous experience, CDD anticipates offering gap financing awards that range from \$15,000-\$40,000 per unit of affordable housing. The amount of subsidy offered will reflect the extent to which proposals match the City's overall goals, objectives, and preferences as described in this RFP; the extent to which all other available financing sources are pursued; and the availability of funds.

CDD anticipates that at least 50% of the funds offered to any project will be provided in the form of a 30-year loan, at 0% interest, payable upon the earliest of the sale, transfer, or change in use of the property. Repayment will be based on a percent of the restricted rent appraised value after rehabilitation or construction, derived from the amount of CDD-administered funds invested in the project or the amount of the loan, whichever is greater.

CDD further anticipates that up to 50% of the funds offered will be provided in the form of a 16-year term loan, amortized over 30 years. The interest rate will be set at 2.75% or the annual long-term Applicable Federal Rate, whichever is lower. Annual payments will commence one year after project completion, contingent upon sufficient cash flow to support the project. In the event that cash flow is insufficient to pay all or a portion of the annual payment, the balance of the loan must be repaid at the end of the 16-year term.

In addition to direct subsidies offered as part of this RFP, applicants may also qualify for a waiver from payment of Park Impact Fees for development of low-cost rental housing units. A low-cost unit is defined as one reserved for households with incomes less than or equal to 60% AMI and for which rents are restricted to amounts not greater than 30% of income for a household at 60% AMI with a land use restricted period of at least 30 years.

The City may alter the terms and conditions of its loans from those described above if it deems that is necessary to maximize the expansion of affordable housing units or incentivize the responsiveness to the stated preferences.

1.5 Requirements and Preferences

Requirements

The CDD has identified the following conditions of eligibility:

- Applicant must seek 2019 LIHTCs and meet the corresponding income, occupancy, and rent restrictions.
- The entity applying for City funds must have an ownership interest in the development.
- Applicant must demonstrate site control at the time of application, unless the site is already owned or controlled by the City or the Community Development Authority.
- Proposed sites for new construction must be located in an Eligible or Preferred Area as identified on the attached map. However, an acquisition/rehab development may be proposed at any location within the City of Madison, except areas designated as Ineligible.
- Proposals must demonstrate strong connections with or proximity to key amenities such as employment opportunities, public transit, a full service grocery store, health facilities, schools, parks, and other basic amenities.
- At least 15% of the proposed affordable units must be reserved for households with incomes at or below 30% AMI and those units must be distributed proportionately across proposed unit sizes (e.g., one, two, and three or more bedroom units).
- At least 20% of the proposed total units must make supportive services available for households that will occupy supportive housing units.
- Any proposal serving households with incomes at or below 30% AMI must have supportive services available for those households.
- Proposals offered City funds will be expected to apply, or have applied, to the Federal Home Loan Bank's Affordable Housing Program.
- Proposals must secure City Plan Commission approval prior to December 31, 2018, unless required sooner by WHEDA.
- Proposals seeking tax credits through the WHEDA Supportive Housing set-aside will not be considered under this RFP.

Preferences

In addition to the conditions of eligibility listed above, preference will be given to:

- New construction proposals with a site located in a Preferred Area as identified on the attached map.
- Acquisition/rehab proposals with a site located in a Targeted Rehab Area as identified on the attached map.
- Proposals from a non-profit entity that assumes the roles of both Developer and Owner or a partnership where the non-profit has a majority ownership interest in the property.
- Proposals in which more than 20% of the proposed affordable units contain three or more bedrooms.
- Proposals in which more than 20% of the proposed affordable units are made available for households with incomes at or below 30% AMI representing a proportional mix across proposed unit sizes (e.g., one, two, and three or more bedroom units).

- Proposals that reflect an integrated supportive housing approach, described below, in addition to meeting the supportive housing requirements outlined in WHEDA's QAP and Appendix S targeting veterans and/or people with disabilities.
- Proposals that leverage the use of all available resources including the deferment of the maximum amount of developer fee feasible.
- Proposals that provide a non-smoking environment throughout the property.
- Proposals that include in-unit internet service at low or no cost to residents.
- Proposals for multifamily developments that include a year-round indoor play space and/or outdoor playground on the premises.

Integrated Supportive Housing Units

The CDD seeks to expand the supply of housing opportunities, with supportive services, for individuals or families who face common obstacles obtaining housing (e.g., poor credit or rental histories, criminal conviction records, etc.) and may require access to supportive services to maintain housing. To be successful, the City recognizes the need to improve the coordination between CDD-assisted affordable housing developments and local agencies providing supportive services designed to achieve housing stability and prevent homelessness.

Preference will be given to proposals that incorporate one or more of the following approaches to supportive service partnerships:

1. Target supportive housing units to one or more of the following population(s):
 - a. **Individuals and/or families experiencing homelessness** selected from the applicable Community-wide Priority List and partner with a local Homeless Services Consortium service provider listed on Attachment B;
 - b. **Formerly homeless families** occupying permanent supportive housing units who are deemed by their service provider to no longer require intensive supportive services and partner with a local Homeless Services Consortium service provider listed on Attachment B.
 - c. **Other Supportive Service Target Populations** which may include:
 - i. Previously incarcerated individuals re-entering the community.
 - ii. Other target population that meets an identified community need.
2. Contribute meaningful financial support for supportive services provided through local service partner(s) experienced in serving the target population. Level of support, intensity, and location of the services (i.e., on- or off-site) will depend on the needs of the target population(s).
3. Demonstrate extensive consultation and coordination of the collaborative partnership between the development, property management, and the supportive services teams. This includes developing a supportive services plan describing, in detail, the design of services made available to the target population(s); planning for a unit mix that will best accommodate the targeted population(s); having pre- and post-initial lease up referral processes designed to screen-in prospective tenants from these target population(s); and utilizing

alternative, flexible tenant screening criteria for prospective tenants who are connected to supportive services.

1.6 Review of Proposals and Scoring Criteria

The City will accept proposals from both non-profit and for-profit developers, as well as those that reflect strategic partnerships between two or more entities. City staff will review and evaluate proposals based on the following criteria:

Scoring Criteria	Points Available
<p>1. OVERALL QUALITY Development concept and plan, number of units, types of units, unit mix and income targeting, in-unit and property amenities, sensitivity to neighborhood context, proposal vision and goals, anticipated market demand, readiness to proceed, and compliance with eligibility requirements.</p>	30 points
<p>2. RESPONSIVENESS Level of responsiveness and extent to which proposal addresses overall City goals, objectives, and preferences as described in this RFP.</p>	20 points
<p>3. FEASIBILITY Development pro forma details reasonable sources and uses of funds and includes all project costs. Operating budget details reasonable costs and cash flow over the period of affordability. Financial structure included maximized available resources, financial strength of proposal, financial strength of applicant, and includes reasonable assumptions and projections. WHEDA self-score is accurate and reasonable.</p>	20 Points
<p>4. PROPOSED SITE Proximity to public transit, schools, employment opportunities, groceries, and other key amenities and/or benefit to surrounding neighborhood; impact on schools; suitability for new construction or major rehabilitation; conformance with adopted plans; evidence of site control; absence of known environmental issues that might significantly delay the project; likelihood of project meeting zoning requirements and securing City permits and/or approvals; level of Alder support; and level of neighborhood support.</p>	20 points
<p>5. CAPACITY, EXPERIENCE AND QUALIFICATIONS Demonstrated capacity to produce a high-quality product – based on successful history of developing affordable housing, including the incorporation of supportive housing units and supportive services partnership(s), and performance on past CDD-assisted projects.</p>	10 points
<p>Total Points Available</p>	100 points

While informative, proposal scores are not the sole factor in making funding decisions. The top scoring proposals will be recommended for further consideration.

Development teams that remain under consideration will be expected to present to a City review team the week of August 6th. This review team will formulate recommendations for financial assistance to selected projects. Those recommendations, including funding amounts and terms of the awards, will be presented for review to the City's Community Development Block Grant Committee (CDBG Committee). Selected applicants will be expected to make project presentations to this Committee on October 4th. CDBG Committee recommendations will be forwarded to the Finance Committee and Common Council for final approval. Common Council has final authority over offers of financial assistance.

1.7 Initial and Ongoing Project Requirements

The City will secure its funding with promissory notes and a mortgage in the form of non-recourse loans. Applicants offered financial support will be required to enter into a 30-year Land Use Restriction Agreement, recorded in first position following the first mortgage for the period of affordability.

The City will require the recipient of its funds to submit detailed compliance reports and other periodic reports on the project during the period of affordability. Due dates and specific requirements will be established within the Loan Agreement. The City reserves the right to schedule site visits to verify compliance with the terms of the City agreement.

SECTION 2: PROPOSAL SUBMISSION REQUIREMENTS

2.1 Pre-Application Process

1. Applicants are required to contact CDD staff at least two weeks prior to submitting an application to notify the CDD of the applicant's intent to apply and discuss how the City might best support the proposed development. To discuss your project, please contact Julie Spears (Community Development Specialist) at jspears@cityofmadison.com or 608-267-1983 or Linette Rhodes (Interim CD Supervisor) at lrhodes@cityofmadison.com or 608-261-9240.
2. In addition, applicants are required to contact and meet with Planning Division staff at least two weeks prior to submitting an application to discuss site selection, land use approvals, and permits. Joint pre-development meetings with Planning Division and CDD staff will be scheduled whenever possible. To schedule a meeting, please contact Kevin Firchow, (Principal Planner in the City's Planning Division) at kfirchow@cityofmadison.com or 608-267-1150.
3. Finally, applicants whose proposals are within an active tax increment financing (TIF) district are required to contact and meet with Economic Development Division staff to discuss a preliminary application for TIF assistance at least two weeks prior to the AHF deadline. Applicants are strongly encouraged to contact staff as soon as feasible. Applicants will be asked to work with staff to submit a formal application for TIF assistance in advance of or concurrently with an AHF application. To discuss the process

for TIF assistance, contact Matt Wachter (Office of Real Estate Services Manager in the City's Economic Development Division) at mwachter@cityofmadison.com or 608-266-5940.

2.2 Response Format

1. Proposals and all required additional documentation must be submitted electronically to CDDapplications@cityofmadison.com utilizing the Application Form in Microsoft Word, the budget in the Excel Workbook, and/or PDFs. Applicants must also submit five (5) paper copies of their proposals by the deadline listed above. These must be individually and securely bound.
2. The response to the RFP should be complete and comprehensive but succinct. Attachments or documents not specifically required should not be submitted.

2.3 Required Information and Content of Proposals

Proposals must include the following documents listed below in order to be considered complete and eligible for consideration, including all additional requested documentation. Please include only the required submittals.

1. RFP Application Form and Budget Workbook
Available on the [Community Development Division Funding Opportunities Website](#).
2. Supplemental Application Information
 - a. Detailed site map and a second map showing the site in the context of the City.
 - b. Project Organizational Chart, including ownership interest percentages.
 - c. Description of the development team's experience in the following areas:
 - i. Obtaining and utilizing federal, state, city, and other financing resources
 - ii. Participating in public/private joint ventures
 - iii. Developing multifamily housing for low- and moderate-income households
 - iv. Property management, including their experience with supportive housing.
 - v. Providing supportive housing units or delivering supportive services.
 - d. Three references for the development team based on similar projects as that being proposed.
 - e. Market Study, prepared by a third-party market analyst, if available at the time of application.
 - f. Capital Needs Assessment report of the subject property, if the proposal is for a rehabilitation project and if the report is available at the time of application.
 - g. Phase 1 Environmental Site Assessment (Executive Summary only), if available at the time of application.

If the Market Study, Capital Needs Assessment, and/or Phase I ESA Executive Summary are not available at the time of application, submittal of these items will be required as they become available and in advance of receiving the CDD commitment letter.

Applicants may be required to submit additional information upon request.

3. Designation of Proprietary and Confidential Information – Attachment A
Complete and submit the form included in this document, if applicable.

SECTION 3: GENERAL RFP ADMINISTRATIVE INFORMATION

3.1 Point of Contact

The RFP contact identified below is the sole point of contact regarding the RFP from the date of release of the RFP until selection of the successful proposer(s).

Julie Spears, Community Development Specialist
City of Madison Community Development Division
Phone: 608-267-1983
Email: jspears@cityofmadison.com

All communications relating to this RFP must be directed to the designated contact for this RFP. All bidders, proposers, protestors, or individuals acting on their behalf are hereby prohibited from attempting to persuade or influence any City agents, employees or any member of the relevant selection team, for or against a specific cause related to a pending solicitation, unless otherwise directed by the RFP contact.

3.2 Inquiries and Clarification of Specifications

Proposers shall carefully examine the RFP and contract documents, correlate their observations with the RFP specifications, and exercise their own judgment as to the nature and scope of the work required. If applicable, visit the Department's website, [CDD Funding Opportunities](#). Consider federal, state, and local laws and regulations that may affect cost, progress, performance or furnishing of the work.

Proposers shall immediately notify the RFP contact of any questions, exceptions, clarification of any ambiguity, error, conflict, discrepancy omission or other deficiency or additions they have concerning the RFP document. Failure to do so will be at proposer's own risk.

This RFP will serve as the basis for or will become part of the resulting agreement. No plea of ignorance of conditions or difficulties that exist or may hereafter arise in the execution of the work under this contract as a result of failure to make necessary examinations and investigations, shall be accepted as an excuse for any failure or omission on the part of the bidder to fulfill the requirements of the contract.

3.3 Contracting Agency

The contract resulting from this RFP will be administered by Community Development Division, City of Madison.

3.4 Addenda / Official Communication

During the solicitation process for this RFP, all official communication between the City and proposers will be made via the [Community Development Division Funding Opportunities Website](#). The City will post such notices, which will include, but not be limited to, addenda for any modifications to administrative or performance requirements, clarifications to requirements, and the announcement of the apparent winning proposer(s). It shall be the responsibility of the proposers to regularly monitor this website for any such postings. Failure to retrieve such addenda and include their appropriate provisions in your response, may result in your proposal being disqualified.

3.5 Oral Presentations / Site Visits / Pre-Application or Pre-Award Meetings

Proposers may be asked to attend pre-application and/or pre-award meetings, make oral presentations, or make the site and/or properties available for a site visit as part of this request for proposal process. Such presentations, meetings, or site visits will be at the proposer's expense.

3.6 Acceptance/Rejection of Proposals

1. The City reserves the right to accept or reject any or all proposals submitted, in whole or in part, and to waive any informalities or technicalities, which at the City's discretion is determined to be in the best interests of the City. Further, the City makes no representations that a contract will be awarded to any proposer responding to this request. The City expressly reserves the right to reject any and all proposals responding to this invitation without indicating any reasons for such rejection(s).
2. The City reserves the right to postpone due dates and openings for its own convenience and to withdraw this solicitation at any time without prior notice.

3.7 Incurring Costs

This request for proposals does not commit the City to award a contract, pay any costs incurred in preparation of proposals, or to procure or contract for services or equipment.

3.8 Proposer Qualifications

The City of Madison may make such investigations as it deems necessary to determine the ability of the proposer to perform the work, and the proposer shall furnish to the City all such information and data for this purpose, as the City may request. The City reserves the right to reject any proposal if the evidence submitted by, or investigated of, such proposer fails to satisfy the City that the proposer understands the full scope of work and is properly

qualified to carry out the obligations of the contract and to complete the work contemplated herein.

3.9 Proposal Content

The evaluation and selection of a Contractor and the contract will be based on the information submitted in the vendor's proposal plus any additional information required. Additional information may include references, on-site visits, or oral presentations. Failure to respond to each of the requirements in the RFP may be the basis for rejecting a response.

Elaborate proposals (e.g. expensive artwork, news stories, or letters of support) beyond information required to present a complete and effective proposal, are not necessary or desired. Information provided by the applicant in addition to the required proposal may not be considered in the evaluation of the proposal.

3.10 Withdrawal or Revision of Proposals

1. A proposer may, without prejudice, withdraw a proposal submitted at any point in the process by requesting such withdrawal in writing (email is sufficient) to the RFP contact.
2. Proposals may not be modified or altered after the deadline.

3.11 Designation of Proprietary Information

Proposers are hereby notified that all information submitted in response to this RFP may be accessible to the public through the Community Development Division website and/or made available for public inspection according to public records laws of the State of Wisconsin or other applicable public record laws. Therefore, proposers are encouraged to refrain from submitting information that cannot be open for public inspection. However, if proposers must include information deemed confidential and proprietary by the proposer, proposer must comply with these instructions:

1. All restrictions on the use or inspection of data contained within a proposal shall be requested prior to submission of the proposal itself. Written requests for confidentiality shall be submitted to the RFP contact by the proposer prior to the proposal submission date.
2. Requests shall use the following process:

SECTION 1 – Email or phone the RFP contact to discuss your concern.

SECTION 2 – Any information to be considered confidential or proprietary must clearly be stated on the attached "Designation of Confidential and Proprietary Information" form. (RFP Attachment A).

SECTION 3 – Any information to be considered confidential or proprietary must be separated from the rest of the proposal. Co-mingling of confidential/proprietary and other information is not acceptable.

SECTION 4 – Applicants may be asked to submit a written request for information to be considered confidential or proprietary. Provide specific information related to the claim for confidential and proprietary information including RFP section, page number, topic, and specific concern that supports claim.

3. Allocation requests always become public information through the selection committee process. Information usually cannot be kept confidential unless it involves a trade secret as defined in S.134.90(1)(c), Wis. Stats. Any information that will be included in any resulting contract cannot be considered confidential. A proposal, in its entirety, will not be considered confidential and/or proprietary.
4. Proprietary information submitted in a proposal, or in response to the RFP, will be handled in accordance with the applicable Wisconsin State Statute(s). However, the City cannot ensure that the information will not be subject to release if a request is made under applicable public records laws. The City will not provide advance notice to a proposer prior to release of any requested record.
5. The Selected Contractor agrees to hold the City harmless for any damages arising out of the release of any material unless they are specifically identified. In the event the designation of confidentiality of this information is challenged, the Selected Contractor also agrees to provide legal counsel or other necessary assistance to defend the designation of confidentiality and, further, agrees to hold the City harmless from any penalties, costs, damages, and fees, including attorney's fees, awarded to the requestor and ordered to be paid by the City, in any such legal action.
6. To the extent permitted by law, it is the intention of the City to withhold the contents of the proposal from public view until such times as competitive or bargaining reasons no longer require non-disclosure, in the opinion of the City. At that time, all proposals will be available for review in accordance with the Wisconsin Open Records Law.

3.12 Sample Loan Agreement

Proposers are responsible for reviewing this information on the [CDD Funding Process website](#) prior to submission of their bid. The Sample Loan Agreement shall serve as the basis of the contract resulting from this RFP, subject to revision at the City's discretion. The terms of this template contract shall become the basis for contractual obligations following award of the RFP. By submitting a proposal, proposers affirm their willingness to enter into an Agreement containing these terms.

3.13 City of Madison Standard Terms and Conditions

Proposers are responsible for reviewing this information on the [CDD Funding Process website](#) prior to submission of their proposal. City of Madison Additional Standard Terms and Conditions are the minimum requirements for the submission of Proposals.

3.14 Proposal Evaluation and Award

1. PRELIMINARY EVALUATION

Submitted proposals will be reviewed for completeness and compliance with RFP guidelines. All incomplete RFP submissions may be determined nonresponsive and removed from further consideration. To be considered complete, RFPs shall include all required submittals and shall be signed and dated. In the event that no submissions meet all of the RFP requirements, the City of Madison reserves the right to continue the evaluation of the proposals that most closely meet the requirements.

2. PROPOSAL EVALUATIONS, INTERVIEWS AND/OR SITE VISITS

The City's designated RFP Selection Committee will make the final selection and recommendation following the evaluation of the proposals which may include presentations, site visits, and interviews, if deemed necessary, with some or all of the proposers. However, the City may make preliminary selection(s) on the basis of the original proposals only, without negotiation, interviews, and/or site visits with any proposers. If presentations, interviews, and/or site visits are conducted, the Selection Committee may choose to assign additional points for these processes or re-evaluate, re-rate, and/or re-rank the finalists' proposals based upon the written documents submitted and any clarifications offered in the interviews.

3. BEST AND FINAL OFFER

The designated Selection Committee may request best and final offers from one or more proposers determined to be reasonably susceptible to being selected for award for the purpose of clarification to assure full understanding of, and responsiveness to, the solicitation requirements. Proposers shall be accorded fair and equal treatment with respect to any opportunity for discussion and revision of proposals, and such revisions may be permitted after submissions and prior to award for the purpose of obtaining best and final offers. If best and final offers are requested, they will be evaluated against the stated criteria, scored, and ranked. The City reserves the right to negotiate the terms of the contract, including the award amount, with the selected proposer(s) prior to entering into a contract. If contract negotiations cannot be concluded successfully with the selected proposer(s), the City may negotiate a contract with the next highest scoring proposer.

4. CLARIFICATION OF PROPOSALS

During the evaluation of proposals, the City reserves the right to contact any or all proposers to request additional information for purposes of clarification of RFP

responses, reject proposals which contain errors, or at its sole discretion, waive disqualifying errors or gain clarification of error or information.

5. **PRICE AND/OR COST ANALYSIS**

The City reserves the right to conduct a price and/or cost analysis to determine if the price is fair and reasonable. If only one responsive proposal is received, a detailed price and/or cost analysis may be requested of the single proposer. Proposers shall cooperate as needed with the City's efforts to perform said analyses.

6. **NEGOTIATION**

The City reserves the right to negotiate final fees and scope of services with the selected Contractor.

7. **PROCESS**

At any phase, the City reserves the right to terminate, suspend, or modify this selection process; reject any or all submittals; and waive any informalities, irregularities or omissions in submittals, all as deemed in the best interests of the City.

8. **COMMUNICATION WITH SELECTION COMMITTEE**

Proposers may not contact members of the Selection Committee at anytime during the evaluation process, except at the City of Madison CDD request, or as instructed in Section 2.1 above.

9. **RIGHT TO REJECT PROPOSALS AND NEGOTIATE CONTRACT TERMS**

The City reserves the right to reject any and all proposals and to negotiate the terms of the contract, including the award amount, with the selected proposer(s) prior to entering into a contract. If contract negotiations cannot be concluded successfully with the selected proposer(s), the City may negotiate a contract with the next preferred proposer.

ATTACHMENT A

DESIGNATION OF CONFIDENTIAL AND PROPRIETARY INFORMATION

Proposers are hereby notified that all information submitted in response to this RFP may be made available for public inspection according to public records laws of the State of Wisconsin or other applicable public record laws. Therefore, proposers are encouraged to refrain from submitting information that cannot be open for public inspection. However, if proposers must include information deemed confidential and proprietary by the proposer, proposer must comply with these instructions:

- Requests for confidentiality must be submitted prior to the proposal submission date to the City of Madison Purchasing Office.
- Requests for confidentiality must use this designated form. Failure to include this form in the bid/proposal response may mean that all information provided as part of the bid/proposal response will be open to examination and copying. The City considers other markings of confidential in the bid/proposal document to be insufficient.
- Any information to be considered confidential or proprietary must be separated and packaged from the rest of the proposal. Co-mingling of confidential/proprietary and other information is not acceptable.

Prices always become public information when bids/proposals are opened or when negotiations have been completed and the contract has been awarded. Other information usually cannot be kept confidential unless it involves a trade secret as defined in S.134.90(1)(c), Wis. Stats. Any information that will be included in any resulting contract cannot be considered confidential. A proposal, in its entirety, will not be considered confidential and/or proprietary.

Other information cannot be kept confidential unless it is a trade secret. Trade secret is defined in s. 134.90(1)(c), Wis. Stats. as follows: "Trade secret" means information, including a formula, pattern, compilation, program, device, method, technique or process to which all of the following apply:

1. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.
2. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

In the event the designation of confidentiality of this information is challenged, the undersigned hereby agrees to provide legal counsel or other necessary assistance to defend the designation of confidentiality and agrees to hold the City of Madison harmless for any costs or damages arising out of the City's agreeing to withhold the materials.

The attached material submitted in response to Bid/Proposal # _____ includes proprietary and confidential information which qualifies as a trade secret, as provided in s. 19.36(5), Wis. Stats., or is otherwise material that can be kept confidential under the Wisconsin Open Records Law. As such, we ask that certain pages, as indicated below, of this bid/proposal response be treated as confidential material and not be released:

Section	Page No.	Topic	Specific law that supports confidentiality of information

Company Name _____

Enter Name: _____

By entering your initials in the box,

You are electronically signing your name and agreeing to the terms above.

Date: _____

ATTACHMENT B



Service Providers & Target Populations

<p>Community Action Coalition For South Central Wisconsin, Inc. (CAC) Jim Schroeder Executive Director jschroeder@cacsw.org Ph: 608-246-4730 x217 A & B</p>	<p>The Road Home Kristen Rucinski Executive Director kristinr@trhome.org Ph: 608-294-7998 x302 A & B</p>
<p>Porchlight, Inc Karla Thennes Executive Director kthennes@porchlightinc.org Ph: 608-257-2534 x14 A & B</p>	<p>YWCA Madison Jael Currie Housing Director jcurrie@ywcamadison.org Ph: 608-247-1436 A & B</p>
<p>The Salvation Army of Madison Melissa Sorensen Director of Social Services Melissa.sorensen@usc.salvationarmy.org Ph: 608-250-2237 A only</p>	<p>Tellurian UCAN Rachel Kaiser Director of Homeless Services rkaiser@tellurian.org Ph: 608-354-4747 A only</p>
<p>Tenant Resource Center Brenda Konkel Executive Director bkonkel@tenantresourcecenter.org Ph 608-257-0006 x5 A only</p>	<p>Housing Initiatives Dean Loumos Executive Director dloumos@housinginitiatives.org Ph: 608-277-8330 x1 A only</p>

Individuals and/or Families Experiencing Homelessness (A):

Agencies providing supportive services for individuals and/or families experiencing or at risk of homelessness.

Formerly Homeless Families (B):

Agencies providing supportive services for formerly homeless families who are no longer in need of intensive supportive services.

Agencies listed above may have the potential to partner on development proposals seeking to include permanent supportive housing units targeting one or more of these populations.