



Community Development Authority of the
City of Madison
Request for Qualifications:
Affordable Senior Housing
RFQ No: 4530-0-2016

NOTICE OF REQUEST FOR QUALIFICATIONS

The City of Madison and the Community Development Authority of the City of Madison (“CDA”) are undertaking the development of approximately 50-60 units of affordable senior housing in Madison, Wisconsin (“Senior Housing”). This housing will be developed as apartments in a multifamily building. It will be noted for its high quality architecture and the use of high quality building materials. It will be targeted primarily towards 62 and older adults that are residents of the City of Madison at a range of incomes.

The City and the CDA are soliciting qualifications from teams for services relating to the financing, development, and operations of senior housing. Proposed services may include, but are not limited to, applying for Section 42 tax credits, structuring financing for the development, selecting and managing a project team, project management through construction, as well as services relating to property management and connecting residents to supportive services relating to seniors.

The complete Request for Qualifications can be obtained by going to **Room 312, Madison Municipal Building, 215 Martin Luther King, Jr. Boulevard, Madison, Wisconsin, 53703**, by contacting Andrea Freedman at afreedman@cityofmadison.com ,or by going to:

<http://www.cityofmadison.com/finance/purchasing/bidDemandStar.cfm> or
www.vendornet.state.wi.us or
www.demandstar.com

The bid identifier is RFQ 4530-0-2016

Teams wishing to be considered shall submit seven (7) copies of their statements of qualification along with a CD or flash drive containing the document as a PDF to the CDA c/o Matt Wachter, Room 312, Madison Municipal Building, 215 Martin Luther King, Jr. Boulevard, Madison, Wisconsin, 53703, no later than 2:00 p.m., June 24, 2016. Questions should be directed to Matt Wachter at (608) 261-9664, or mwachter@cityofmadison.com.

Published:

June 11, 2016

June 18, 2016

Disclosure and Disclaimer

This Request for Qualifications (“RFQ”) is being furnished to the recipient by the CDA and the City for the recipient’s convenience. Any action taken by the CDA or the City in response to submissions, made pursuant to this RFQ, or in making any awards or failure or refusal to make any award pursuant to such submissions, or in any cancellation of awards, or in any withdrawal or cancellation of this RFQ, either before or after issuance of an award, shall be without any liability or obligation on the part of the CDA or the City and their officials and employees.

The CDA, in its sole discretion, may withdraw this RFQ before or after receiving submissions, may accept or reject any or all submissions, and may waive any irregularities if the CDA deems it appropriate and in its best interest. The CDA shall determine the responsiveness and acceptability of any proposal submitted.

Prospective teams should rely exclusively on their own investigations, interpretations and analyses in preparing and submitting qualifications, and should not rely on communications with CDA and City staff or their officials. The CDA and the City make no warranty or representation that any submission which conforms to the requirements of this RFQ will be selected for consideration, negotiation, or approval.

The CDA, the City, and the selected team will be bound only if and when a submission, as same may be modified, and any applicable definitive agreements and budgetary authorizations pertaining thereto, are approved by the City of Madison and then only pursuant to the terms of the definitive agreements executed among the parties.

Any proposer selected by the City at the conclusion of the RFP process that receives City financial assistance for the project shall be required to comply with the City’s ordinances concerning nondiscrimination, living wage, equal benefits, accessibility, equal opportunity and affirmative action, as applicable. These requirements may also be applicable to a chosen proposer’s contractors and subcontractors who perform work on the project. Any such proposer shall allow the maximum feasible opportunity to small business enterprises to compete for subcontracts entered into for work on the project.

Respondents are notified that any materials submitted in response to this RFQ become public documents and are available to the public as governed by the “Open Records” statutes of the State of Wisconsin.

All submissions and supporting data shall be subject to disclosure as required by State law. All submissions shall be submitted in sealed form and shall remain confidential to the extent permitted by State statutes and ordinances of the City of Madison, until the date and time selected for opening the responses.

AFFORDABLE SENIOR HOUSING

The City and the CDA are preparing to go forward with a public/private joint venture development of approximately 50-60 units of apartments in a multifamily building with for 62 and older adults (“Seniors”). It will be noted for its high quality architecture and the use of high quality building materials. The City and the CDA are seeking a partner for the development and management of this building.

The City and the CDA are targeting this development for seniors that:

- Primarily are residents of the City of Madison
- Have a range of incomes (30%, 50%, 60%, 80%, and above of Area Median Income)

The proposer will be responsible for structuring financing for the development likely including an application for Section 42 tax credits in January 2017, selecting and managing a project team, construction project management, property management, and connecting residents to supportive services. Occupancy is anticipated in 2019.

The City or the CDA will be responsible for obtaining control of a site in anticipation of a January 2017 Section 42 tax credit application as well as supplying capital subsidy in an amount to be determined.

DESIRED SERVICES

The CDA and the City are interested in a partner that can provide the following services:

- Real Estate Development
 - Obtain land use approvals
 - Apply for Section 42 tax credits
 - Provide financial guarantees for construction, tax credits, and operations
 - Develop and structure a financial package for construction and operation of the development
 - Select and manage a project team that will provide architecture, engineering, and construction services
 - Manage project development and construction
- Property management
 - Tenant screening and intake
 - General building maintenance
 - Budgeting and financial reporting
- Support Services
 - Connect residents through staff capacity or community partnerships with supportive services including but not limited to:
 - Healthcare
 - Transportation
 - Enrichment Activities

POTENTIAL TEAMS ARE REQUIRED TO PROVIDE THE FOLLOWING INFORMATION:

1) FIRM PROFILE

Please Note: The City of Madison has adopted a local preference purchasing policy that would grant a five percent scoring preference to local vendors. Proposers seeking to obtain local preference status must meet specific criteria and register online at:

<https://www.cityofmadison.com/business/localpurchasing/>

To qualify your company must be registered at time of proposal submission.

- a) Describe your team structure, including individual roles and relevant experience, as well as a single point of contact including name, phone number, and address.
- b) Provide the name and the background of the person that will have primary responsibility for project management on this project.

2) EXPERIENCE

Describe your team's experience in:

1. Real Estate Development
 - a. Team experience in obtaining Section 42 tax credits
 - b. Team experience in developing low-income multifamily housing and senior housing
 - c. Team experience in public/private partnerships
2. Property Management
 - a. Team experience in providing property management services for housing with Section 42 low income housing tax credits
 - b. Team experience in providing property management services for low income multiunit housing in buildings of comparable size
 - c. Team experience in providing property management services for senior housing
3. Support Services
 - a. Team experience in providing or partnering with providers of supportive services for seniors

3) REFERENCES

List and provide contact information for three clients for whom you have provided similar services

4) FINANCIAL INFORMATION

- a) Provide written statement of willingness and ability to provide construction, tax credit, and operating guarantees
- b) At the request of the CDA, teams shall make available for review by CDA and City staff or their agent copies of the firm's financial statements.
- c) Provide financial / bank references

SELECTION AND EVALUATION PROCESS

Evaluation of responses to the RFQ will be based upon the following criteria.

1. Real Estate Development 40%
 - a. Team experience in obtaining Section 42 tax credits
 - b. Team experience in developing low-income multifamily housing and senior housing
 - c. Team experience in public/private partnerships
2. Property Management 30%
 - a. Team experience in providing property management services for housing with Section 42 low-income housing tax credits
 - b. Team experience in providing property management services for low-income multiunit housing in buildings of comparable size
 - c. Team experience in providing property management services for senior housing
3. Support Services 20%
 - a. Team experience in providing or partnering with providers of supportive services for seniors
4. Team Capacity 10%
 - a. Ability of team to provide a broad range of services
 - b. Financial strength of team
 - c. Local preference

CDA staff will review all submittals to ensure that the required items are included. The Selection Committee will include City and County committee members selected by the CDA.

The Selection Committee will evaluate qualifications per the evaluation criteria factors stated in this section. Teams that fully submit required materials will be asked to attend an interview.

The CDA anticipates conducting interviews between June 29 and July 1, 2016. At the interview, the selected firms may be asked to provide more specific information about qualifications, range of services, methodology, and costs as well as answer questions posed by the review team. If necessary, alternate arrangements (Skype, conference call) can be made for the interview.

After the interviews are completed, the Selection Committee may select a project team. The selection must be accepted by the CDA. The selection must also be approved by the Madison Common Council.

Each team that submits qualifications will receive a written acknowledgement of its receipt. Neither the City nor the CDA will reimburse firms for any expenses associated with the submission of qualifications or participation in the interviews.

The CDA and the City reserve the right to negotiate the final agreement details prior to finalizing a contract with the selected development team. The CDA and the City retain the right to reject any or all proposals.

RFQ Timeline

6/8/2016	Issue RFQ
6/24/2016	RFQ Closes
7/1/2016	Interviews - Subcommittee Recommendation
7/11/2016	Acceptance of Recommendation - CDA
7/19/2016	Approval of Recommendation - Common Council

February 3 Tax Credit Submission