

# **REQUEST FOR QUALIFICATIONS**

**RFQ # 0021**

**Consultant for Development Services**

## Cover Page

<b>Proposal Issue Date: Friday, October 11 2019</b>			
<b>Solicitation Closing Date: Friday, Nov 8, 2019</b>		<b>Solicitation Closing Time: 2:00 PM ( EST)</b>	
<b>Issued By: United Planning Organization (UPO)</b>			
<b>Address: 301, Rhode Island Ave, NW, Washington, DC 20001</b>			
<b>Telephone Number: 202-238-4600</b>			
UPO is a non-profit agency in the District of Columbia and is exempt from any state or federal taxes.			
Unless otherwise stated, all quoted prices shall be Free On Board (FOB) headquarter address inside delivery.			
Responses must be received on or before <b>Friday, Nov 8, 2019</b> , by 2:00 PM (EST.) in the Procurement Office, United Planning Organization, 301 Rhode Island Avenue, NW, Washington, DC 20001.			
<b>Electronic responses:</b> Please submit your proposal to <a href="mailto:procurement@upo.org">procurement@upo.org</a> referencing "Consultant for Development Services RFQ #0021" in the subject line.			
For questions/information, please email Rizwanul Haque, Procurement Officer, at <a href="mailto:rhaque@upo.org">rhaque@upo.org</a> referencing "Consultant for Development Services RFQ #0021" in the subject line. Your questions will be answered within three (3) business days and will be posted on UPO website. Questions/information must be emailed no later than COB on <b>Monday, October 28, 2019</b> .			
United Planning Organization reserves the right to waive informalities or irregularities, to reject any or all qualifications received, to accept the proposal deemed best for the organization, and/or request new proposals if necessary.			
Any objection to the above conditions must be clearly indicated in the proposal.			
In compliance with this RFQ and to all the conditions imposed herein, the undersigned offers and agrees to furnish the services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.			
<b>VENDOR IDENTIFICATION</b>			
Company / Individual's Name:			
Address:			
Telephone:			
Email:			
Federal ID/SSN #:			
Print Name	Title	Authorized Signature	Date

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## **I. PURPOSE: REQUEST FOR QUALIFICATIONS (“RFQ”)**

The United Planning Organization (“UPO”) intends to establish a pool of highly qualified firms from which the Agency will procure independent third-party development consultants and partners. The pool will represent experienced partners for the selection and development of UPO’s future headquarters and the redevelopment of UPO’s current headquarters at 301 Rhode Island Ave NW, Washington DC. Selections will be based on expertise in the given areas of real property development and innovative financing solutions, and experience with developments similar to UPO’s needs. UPO invites firms to submit detailed proposals to match the RFQ request.

## **II. UNITED PLANNING ORGANIZATION (UPO) BACKGROUND**

UPO is a 501(c) (3) private non-profit corporation and the designated Community Action Agency for the District of Columbia DC, providing leadership, support and advocacy to empower low-income residents of Washington, DC to become self-sufficient and self-determined.

UPO serves as Washington, DC’s non-government human service organization that promotes self- sufficiency and brings innovative ideas to the problem of poverty throughout the city. UPO operates a wide array of special activities and offers many supportive and instructional services including:

- a. Early Head Start and other childcare programs that make measurable differences in the education of our youngest and their families
- b. Job placement and career development services
- c. Job and vocational training via the Workforce Institute
- d. Comprehensive youth services with scholarships for DC residents
- e. Homeless transportation services
- f. Training programs designed to prepare participants for skilled employment
- g. Substance abuse treatment programs to treat and overcome addictions
- h. Tax preparation and e-filing community based tax preparation services
- i. Housing counseling services that help alleviate predatory lending, avoid foreclosures and prepare customers for home ownership
- j. Affordable housing partnerships, permanent supportive housing and resident services

## **III. UPO DEVELOPMENT GOALS**

UPO seeks developer consultants and partners that provide high quality, market and affordable housing developments in Washington DC, demonstrate an understanding of the District’s development and financing instruments, its housing needs, and the unique attributes and opportunities of UPO’s current site and its surrounding neighborhood.

The Consultant (individual or firm) will be required to assist the UPO Executive Management team, UPO CDC and UPO Board of Directors on the most beneficial strategy to meet its real estate and housing goals. Its real estate goal is to relocate to a new location to house its office headquarters, comprised of 25,000 – 28,000 square feet with adequate parking for up to 100 parking spaces, including car and van parking. Its housing goal is to redevelop its current headquarters on 3.1 acres in a high quality, energy efficient, sustainable mixed use development comprising of market rate and affordable housing, commercial and retail space.

Any developers selected under this RFQ will be an integral partner in the effort to work with UPO in its development goals. UPO will consider responses to this RFQ on an ongoing basis and will remain open until a development partner is selected. Throughout this time period, UPO may select one (1) or more qualified developers to enter into a development agreement. UPO is not limited in the number of respondents that it will select.

From this RFQ, selected consultants will be invited to submit a detailed proposal for the proposed development. Proposals will be reviewed by UPO's Executive team, the UPO CDC and UPO Board of Directors. If the proposal results in an approved project, the City and developer will negotiate an agreement for conveyance of a possessory interest and the development of the project. The agreement would set forth additional detail regarding the property disposition, financing plan, performance milestones for the developer, project development timeline, indemnities and insurance requirements, affordability covenants, and any other requirements for the development.

#### **IV. CONTENT OF PROPOSAL**

The proposal should completely, but succinctly, provide responses to items A through J below. There is no page limitation on attachments, page numbers are offered as guidelines.

- A. Background Information** (Attachment 1)  
General history and background of your firm. If available, provide your firm's brochure or other responsive information.
  
- B. Personnel and Staffing** (Attachment 2)
  - 1. State the staff size and composition of your firm. Identify the staff and other personnel who will be assigned to UPO and include a current resumé for each such person. Describe any significant changes in relevant staff during the past three (3) years.
  - 2. State the extent to which any relevant support services for your firm will be provided through arrangements with outside firms. Include in your response, all pertinent information relating to each such arrangement.

**C. Scope of Services** (Attachment 3)

1. The Proposal must comprehensively state the breath of development services to be provided. Sample reports may be attached to demonstrate familiarity with development protocols for affordable and mixed-income housing, and commercial development.
2. Please describe your familiarity with innovative financing instruments available for affordable and mixed-income housing, and commercial development.

**D. Statement of Expertise and Experience** (Attachment 4)

1. Detail your firm's technical capabilities and qualifications to provide services to meet UPO's development needs.
2. List the types and number of engagements in which you or your firm has participated in the past 5 years. This should be in the form of a brief narrative with a listing of the transactions. Any listing should indicate the role of your firm and whether the individuals that would be assigned to the UPO account participated in that prior engagement.
3. Describe your firm's ability to provide advice and work on unique, commingled development projects. Provide detail on similar developments, close to UPO's development goals to provide a new HQ in Ward 7 ideally, and develop mixed-income housing on the current site.

**E. Fees and Expenses** (Attachment 5)

(Assume a vacant land parcel for a to-be-built, 240 unit, mixed-income residential community).

For the above scenario, provide a hypothetical summarized timeline, development budget and fee structure inclusive of reimbursable expenses. Please note that UPO will require a separate and specific contract to be negotiated for each development transaction prior to final selection. Detailed billing reports must be available upon UPO request.

In addition, provide a summary of the firm's financial standing to support the development goals. This may include materials such as audited financial statements, annual reports, operating budgets etc.

**F. Insurance** (Attachment 6)

Describe the extent, limits, and deductibles of your malpractice or other insurance.

**G. Actual or Potential Conflicts** (Attachment 7 - 1 page)

1. All respondents are subject to applicable Federal, District, and UPO conflict of interest laws, regulations, and guidelines. Failure to comply with any such laws, regulations, or guidelines will result in the proposal being rejected and possibly other legal action.

State whether you or your firm or any individual within your firm represents any clients or interests that may create an actual or potential conflict in the performance of services for UPO.

2. Please include a statement to the effect that, at the time your firm is selected by UPO, if any facts are known or come to light which create an actual or potential conflict that information will be fully disclosed in writing. Also, please describe your firm's policies or procedures for avoiding ethical or conflicts of interest violations.

**H. References** (Attachment 8)

Provide a minimum of three references, preferably other community-based partners. Include contact person's name, mailing address, e-mail address, telephone, and fax numbers.

**I. Equal Opportunity Hiring, Contracting and Joint Ventures** (Attachment 9)

It is the goal of UPO to promote and assist participation by hiring minority and women-owned businesses. Minority-owned or small, or disadvantaged, local business enterprises are encouraged to respond to this solicitation. Any firm seeking to submit a response as a Local, Small or Disadvantaged Business Enterprise must submit a copy of its letter(s) of certification or a sworn notarized Self-Certification form (if applicable) along with any other verification of its status.

Firms may respond as joint ventures. If a joint venture arrangement has been entered into for purposes of responding to this RFQ, please also include the following information:

- (a) The nature of the joint venture agreement with respect to the division of labor.
- (b) Identify the person who will have primary responsibility for overall or primary coordination with UPO.
- (c) The fee-sharing agreement between the firms.

UPO encourages established firms or individuals to joint venture with minority and women-owned firms. In the case of a pre-established relationship, each firm must be qualified to perform its work with the highest level of skill and diligence required to fulfill responsibilities owed to UPO.

**J. Acknowledgement and Agreement** (Attachment 9)

If you agree with the terms, please include with your proposal an executed copy of this acknowledgement by an authorized representative of your firm containing the following language:

“The undersigned party understands and agrees to the provisions of the RFQ issued by the United Planning Organization on October 11, 2019 including any attachments, and will be bound by their terms.

(Name of Firm)

Signature: \_\_\_\_\_

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

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

Date: \_\_\_\_\_ “

## V. QUALIFICATION REQUIREMENTS

UPO will review each Proposal to determine which ones, if any, are most advantageous to fit its needs. Required qualifications for consultants (individual or firm) are detailed below:

1. Experience in real estate market and affordable housing developments of similar scope, complexity, and magnitude (minimum of three projects);
2. Experience in advising organizations regarding similar development options and strategies, and assist in achieving cost-efficiencies for projects;
3. Experience in partnering with the District of Columbia agencies, public and private financing sources to source and secure project approval and funding;
4. Experience and capacity to work cooperatively with City agencies representatives and the community in design and development of the project;
5. Experience with similar development goals, including a strong financial backing, supported by materials such as audited financial statements, annual reports, operating budgets; and
6. Experience and ability to complete development of the project within the time frames set forth in the agreement and based on applicant's track record on similar projects.

It would be helpful if the consultant (individual or firm) has the experience in advising non-profit organizations on such similar projects.

## VI. PROPOSAL REQUIREMENTS

### A. General Requirements

1. In order to be considered for selection, proposers must submit a complete response to this RFQ electronically to **procurement@upo.org** referencing “**Consultant for Development Services RFQ #0021**” in the subject line. No other distribution of the proposals shall be made by the proposer.
2. Proposal shall be signed by an authorized representative of the proposer. All information requested should be submitted. Failure to submit all

information requested may result in the organization requiring prompt submission of missing information and/or given a lowered evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected by UPO.

3. Proposals should be prepared simply, as thorough and detailed as possible, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFQ so that UPO may properly evaluate proposer's capabilities to provide the required services. Emphasis should be placed on completeness and clarity of content.
4. Proposers shall respond to the items in the order they are shown in the RFQ. The responses should describe the most favorable terms and shall remain firm for 120 days from the proposal opening date.
5. Ownership of all data, materials and documentation originated and prepared for this RFQ by any proposer shall belong exclusively to UPO.

## **B. Special Requirements**

All pages of the proposal should be numbered, and should be addressed in the proposer's proposal in the following order:

1. Completed and signed RFQ Cover Page.
2. Completed and signed Attachments as detailed in Section IV: A - J (Content of Proposal).
3. Completed and signed Vendor Identification Form (included as Appendix A to the RFQ).

## **VII. EVALUATION CRITERIA**

1. Proposals will be evaluated on a variety of factors including the quality of the proposal, experience with similar prior developments to meet UPO's goals, desirability of benefits provided by consultant, and a beneficial partnership structure.
2. If any public or private funds are contemplated in the hypothetical financing plan, the proposal shall indicate the source of funding contemplated, the amount to be requested, and proposed use(s) of such funds (i.e., predevelopment, lease payment, soft costs, and/or construction), as well as a timeline indicating when such funds would be required by the project.
3. All proposals will be reviewed to determine if they adhere to the format and instructions of the RFQ, meet the criteria indicated below and conform to the objectives and requirements of the RFQ. An evaluation team will evaluate the merit of proposals received in accordance with criteria outlined in this RFQ. Incompleteness, significant inconsistencies or

inaccuracies found within a response may result in a reduction of the evaluation rating.

4. UPO reserves the right to: (a) waive variances or reject any or all proposals, and (b) request clarifications from any or all proposers. Further, UPO reserves the right to reject any or all proposals and to waive informalities and minor irregularities and to accept any portion of a proposal or all items proposed if deemed to be in the best interest of UPO.
5. Proposals shall be rejected if they: (a) are received after closing date and time, (b) contain alterations not initiated by an authorized official, (c) are not meeting specifications, and (d) are not meeting the general terms and conditions.
6. During the evaluation process, all acceptable received proposals will be evaluated by an evaluation team on the basis of criteria detailed below. A shortlist of finalists may be requested to make an oral presentation.
7. UPO may request additional information or clarifications before making a final decision. UPO reserves the right to select the particular response which will best serve its business interests.
8. If a selection is made as a result of this RFQ, it shall be awarded to the proposal(s) that are considered most advantageous to UPO's development goals.
9. Proposals will be evaluated on the basis of following criteria:
  - Adherence to RFQ: The proposer adheres to the instructions in this RFQ on preparing and submitting the proposal.
  - Qualifications and experience: The proposer's past experience and performance on comparable engagements.
  - Reasonableness of cost: A total dollar amount for the service requested and the detailed breakdown provided with the proposal, if applicable.

## **VIII. GENERAL TERMS AND CONDITIONS**

1. Licenses: By submitting a proposal, proposer certifies that it has procured, and shall maintain in full force, all permits and licenses required to conduct its business lawfully and that it shall remain informed of and in compliance with all federal and local laws, ordinances and regulations that affect in any manner contractor's fulfillment of the contract.
2. Anti-Kickback Provision: This contract is subject to the provisions of the Anti-Kickback Enforcement Act of 1986. By agreeing to this binding agreement,

the transacting parties (1) certify that they have not paid kickbacks directly or indirectly to any employee of UPO for the purpose of obtaining this or any other agreement, purchase order or contract from UPO and (2) agree to cooperate fully with any Federal Agency investigating a possible violation of the Act.

3. Non-Collusion/Fraud: By submitting a proposal, proposer warrants and certifies that neither the proposer nor its employees or associates has contacted any unauthorized UPO employee, officer or elected official regarding the contents of this solicitation or the solicitation process. Proposer further warrants and certifies that neither proposer nor its employees or associates has directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in response to this solicitation. If at any time it shall be found that proposer or its employees or associates has, in the presenting of its proposal, colluded with any other party or parties for the purpose of preventing or restricting free competitive bidding, its proposal shall be immediately rejected. Any contract awarded prior to the UPO's discovery of proposer's collusion shall be terminated and proposer shall be liable for all of its damages sustained by the UPO as a result of proposer's collusion.
4. Equal Opportunity: The proposer agrees not to discriminate against any employee or applicant for employment on account of any services, or activities made possible by or resulting from this RFQ on the grounds of actual or perceived sex, race, color, religion, national origin, age, marital status, disability, personal appearance, sexual orientation, gender identity or expression, familial status, family responsibilities, matriculation, political affiliation, genetic information, source of income, place of residence or business, veteran status or any other characteristic protected under federal or District law. Any violation of this provision shall be considered a violation of a material provision of this agreement and shall be grounds for cancellation, termination or suspension in whole or in part of the agreement by UPO which may result in ineligibility for further UPO contracts. The proposer shall at all times in the proposal and contract process comply with all applicable UPO, DC, and federal anti-discrimination laws, rules, regulations and requirements thereof.
5. Any costs incurred by proposers in preparing or submitting a proposal shall be the proposer's sole responsibility.
6. Pursuant to Federal Acquisition Regulations and UPO's procurement policy, UPO may offer contracting opportunities to small and minority firms, women's business enterprises and labor surplus area firms to the extent possible.
7. Federal, State and Local Taxes: UPO is exempt from State and federal taxes. Such taxes shall not be included in quoted prices, but if any taxes are known to apply, they shall be shown separately. If not so shown, they shall be considered an expense of the proposer and deemed a part of the quoted prices.
8. Indemnification: Proposer shall indemnify, protect, defend and hold harmless UPO, its directors, officers, employees, and representatives from and against

any and all claims arising from or connected with: (1) any alleged or actual breach by proposer or (2) any act or omission by contractor and only to the extent such claim arises by negligence or misconduct or as may be allowed under applicable law. Monies due or to become due under a contract may be retained by UPO as necessary to satisfy any outstanding claim which UPO may have against the contractor.

9. RFQ Addendum: In the event that it becomes necessary to revise this RFQ, in whole or in part, an addendum will be provided on UPO website.
10. Completed Proposals: A proposer may submit no more than one (1) proposal in response to this RFQ. The proposal shall be completed and signed by an individual who is authorized to bind the firm submitting the proposal.
11. Withdrawal of Proposals: At any time prior to the hour and date set for submitting proposals, a proposer may withdraw the proposal. This will not preclude the submission of another proposal prior to the hour and date set for submitting the proposal. After the scheduled time and date for submitting proposals, no proposer will be permitted to withdraw the proposal unless the award is delayed for a period exceeding 60 days.
12. Receipt and Opening of Proposals: Proposers are responsible to assure their proposal is delivered to UPO by the scheduled date and time. Only those proposals which are received in a timely fashion as set forth in this RFQ will receive consideration. Proposals received after the date and hour designated are automatically disqualified and will not be considered; late proposals will be dated, marked as received late, and placed unopened in the proposal file. Proposers must pay particular attention to insure the proposal is properly addressed. UPO is not responsible if the proposal does not reach the destination specified by the appointed date and time.
13. Any agreement resulting from this RFQ shall be subject to but not limited to the following certifications:
  - Certification that neither it nor its principals are not debarred, suspended, proposed debarment, declared ineligible, or voluntarily excluded by any Federal or District of Columbia department or agency from participation in this transaction by any Federal or District of Columbia department or agency.
  - Certification Regarding Lobbying under Title 31, US Code, Section 1352.
14. By submitting a proposal, the proposer represents that:
  - The proposer has read and understands the RFQ and submits the response in accordance therewith.
  - The proposer possesses the capabilities, equipment, and personnel necessary to provide an efficient and successful service.
  - The proposer has all the required licenses and insurance.

**IX. APPENDIX - A: Vendor Identification Form**



**VENDOR IDENTIFICATION (must be completed and returned with bid/proposal)**

Company/Individual's Name:	-----		
Doing Business As (DBA):	-----		
Company Federal ID # or Social Security #:	-----		
Address:	-----		
Remit To Address:	-----		
Telephone:	-----		
Fax:	-----		
Email:	-----		
Web address:	-----		
Main Contact Person:	-----		
Person responsible for response (if different):	-----		
<b>Print Name</b>	<b>Title</b>	<b>Authorized Signature</b>	<b>Date</b>