PRE-PROPOSAL CONFERENCE: CO-DEVELOPMENT PARTNER(S) FOR CHOICE NEIGHBORHOODS PLANNING AND IMPLEMENTATION

Request for Proposals

May 11, 2015

Housing Department

City of Phoenix
AGENDA

1. Welcome and Introductions
2. Sign-in and Meeting Logistics
3. Review of RFP
4. Formal Inquiries
5. Additional Questions
SIGN-IN AND MEETING LOGISTICS

1. Please sign the attendance sheet

2. Please hold questions until the question and answer (Q & A) period
   – Write down questions on the provided note cards
   – Questions collected and read/responses during Q & A session
RFP DESCRIPTION

• Co-development partner opportunity with Phoenix Housing Department (HOU)

• Assist HOU with application, planning and implementation of future U.S. Department of Housing and Urban Development (HUD) Choice Neighborhoods Grants

• Selected Proposer required to work with HOU to prepare grant applications

• If awarded, work with HOU to implement grants
CHOICE NEIGHBORHOODS

• Began in 2010; Successor to HUD HOPE VI Program
• Supports locally-driven strategies for transforming challenged neighborhoods with distressed public or HUD-assisted housing
• Comprehensive approach designed to catalyze critical improvements to neighborhood assets:
  – Vacant property
  – Housing
  – Services
  – Schools
CHOICE NEIGHBORHOODS
CORE PROGRAM GOALS

1. **Housing**: Transform distressed public and assisted housing into energy efficient, mixed-income housing

2. **People**: Support positive outcomes for families living in the target development and surrounding neighborhood focusing on:
   - Resident health; safety, employment, mobility and education

3. **Neighborhood**: Transform distressed, high poverty neighborhoods into viable, mixed-income with access to:
   - Services, schools and education programs, early learning programs, public assets, public transportation and improved access to jobs
• Two Choice Neighborhood Grants available through issuance of HUD Notice of Funding Availability (NOFA)
  – Planning
  – Implementation
CHOICE NEIGHBORHOODS PLANNING GRANT

• Funds used to create a comprehensive neighborhood Transformation Plan with input from residents and community partners

• Plan would provide strategies to:
  – Replace existing public housing in the “East Asset Management Project (AMP) Community” with mixed-income housing
  – Improve educational outcomes
  – Increase neighborhood, economic and housing stability
Implementation grants support those communities that have successfully undergone a comprehensive local planning process.

Ready to implement the Transformation Plan to revitalize the neighborhood to support the three goals:

- Housing
- People
- Neighborhood
• Sidney P. Osborn Homes: 1720 E. Adams Street
  – 29 Buildings; 145 total units; two to five bedrooms
  – Built in 1960; sits on 9.49 acres

• A.L. Krohn Homes: 1940 ½ East Villa Street
  – 27 Buildings; 202 total units; one to five bedrooms
  – Built in 1963; sits on 9.64 acres

• A.L. Krohn East: 14th and Monroe Streets
  – 7 Buildings; 38 total units; two to five bedrooms
  – Built in 1962; sits on 1.92 acres

• Frank Luke Homes: 500 N. 20th Street
  – 70 Buildings; 230 total units; one to four bedrooms
  – Built 1942; sits on 16.22 acres
• **Selected Proposer:** Primary lead in preparation of Planning grant
  – Completing all tasks to fulfill and submit application requirements (corrections, resubmittals as needed)
  – Development of comprehensive neighborhood revitalization plan (Transformation Plan)
  – *HOU lead applicant for all applications*

• Work with HOU to determine most suitable boundaries for targeted neighborhood

• Primary lead in development and implementation of an ongoing resident and stakeholder involvement process (from beginning to implementation)
  – Regularly scheduled meetings
SCOPE OF WORK (KEY ITEMS)  
PLANNING GRANT – AFTER AWARD

• Conduct comprehensive household and neighborhood needs assessments
• Conduct household-level needs assessment of public housing residents in the targeted development(s)
• Develop plan for implementation that has broad community support / effective strategies to achieve three core goals
• Work with HOU to devise resident relocation strategy
• Assess feasibility, costs and neighborhood impact of different options for public housing redevelopment site(s)
• Conduct site planning and/or conceptual architectural design work
SCOPE OF WORK (KEY ITEMS)
PLANNING GRANT – AFTER AWARD

- Develop viable financing plans to implement Housing, People and Neighborhood components
- Planning for improving access to high quality education programs and improved academic and developmental outcomes for neighborhood youth
- Develop partnerships – necessary agencies / organizations
- Planning for neighborhood level improvements
- Work with public and private agencies, organizations and individuals to develop Transformation Plan
- Ensure meaningful resident, community and stakeholder participation throughout development of Transformation Plan
SCOPE OF WORK
IMPLEMENTATION GRANT APPLICATION

• **Selected Proposer:** primary lead in preparation of Implementation grant
  – Completing all tasks to fulfill and submit application requirements (corrections, resubmittals as needed)
  – Implementation of comprehensive neighborhood revitalization plan (Transformation Plan)
  – *HOU lead applicant for all applications*

• Primary lead in development and implementation of an ongoing resident and stakeholder involvement process (from beginning to implementation)
  – Regularly scheduled meetings
• Procure architect, engineering, consultants and/or contractors – coordinate all tasks to implement grant
• Market analysis addressing residential and commercial components of the Plan
• Prepare detailed final development plan and implementation schedule
• Produce overall financing plan
• Prepare mixed-finance proposal
• Prepare / pursue financial applications & obtain equity investment; maximize leveraging – public / private resources
• Provide all operating and financing guarantees
SCOPe OF WOrK (KEY ITEMS)
IMPLEMENTATION GRANT – AFTER AWARD

• Procure general contractor / oversee construction activities
• Demolition and disposition of existing public housing units
• Environmental compliance
• Implement Transformation Plan
• Maintain existing– and seek new partnerships
• Organize ownership entity
• Ensure short- and long-term viability
• Procure qualified property management firm
• Ensure meaningful resident, community and stakeholder participation throughout implementation of Transformation Plan
### SCOPE OF WORK (KEY ITEMS)

**CITY ROLES AND RESPONSIBILITIES**

- Lead Choice Neighborhoods applicant
  - Oversee grant activities through completion
    - Compliance with federal, state and local requirements
- Participate in ownership structure through instrumentality
- Tenant relocation
- HUD approvals and communication / coordination
- Section 3 monitoring
- Resident and Community Services
• Asset management
• Provide land for redevelopment
  – Current East AMP public housing site(s)
• Provide federal operating subsidies for public housing units
• Participate in earning fees through development, management and cash flow of property
INSTRUCTIONS TO PROPOSERS

• Submittal Due Date and Time:
  – Tuesday, May 26, 2015 by 12:00 P.M., Local Time
  – Late proposals will be rejected

• Submittal Location:
  – Phoenix Housing Department: 251 W. Washington Street, 4th Floor

• Inquiries: Submit ALL questions in writing to Nichelle Zazueta-Bonow (Contract Representative)
  – Questions received will be answered via addendum and published on City’s RFP solicitation page

  Proposer’s responsibility to obtain copies of any amendment / addenda. Visit solicitation page daily.
Evaluation and scoring criteria as follows:

<table>
<thead>
<tr>
<th>Category</th>
<th>Score</th>
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<tbody>
<tr>
<td>Experience, Capacity, and Financial Viability</td>
<td>300</td>
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<tr>
<td>Project Approach</td>
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<td>Choice Neighborhood Planning</td>
<td>150</td>
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<tr>
<td>Choice Neighborhood Implementation</td>
<td>150</td>
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<td>Proposed Fee Structure</td>
<td>200</td>
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<td>Community Outreach and Services Plan</td>
<td>100</td>
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<td>Construction, Design and Energy Efficiency</td>
<td>50</td>
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<td>Leverage of Grant Funds and Budgetary Controls</td>
<td>50</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>1,000</strong></td>
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• Proposer’s Experience, Capacity and Financial Viability
  – Proposer’s history; staff experience; familiarity with government regulations
  – Profile and portfolio
    • Experience similar to this RFP scope of work
  – Financial viability; customer references

• Project Approach: Choice Neighborhoods Planning and Implementation
  – Plan to accomplish applications / scopes of service; budget, funding sources and timelines
  – Vision of co-development partnership
  – Management of rental units
• Proposed fee structure – Choice Neighborhoods Planning and Choice Neighborhoods Implementation
  – Anticipated reimbursement for application preparation, fee splits and other anticipated compensation

• Community Outreach
  – Plan to ensure meaningful resident, community and stakeholder participation throughout application, planning and implementation stages
  – Coordination with HOU to provide community and resident supportive services
  – Stimulation of local economy; approach to Section 3 requirements
• Construction, design and energy efficiency
  – Approach, plan and roles for construction, design/amenities, energy efficiency
  – Phasing and unit mix
    • Accessibility standards
  – Approach to improvement of neighborhood assets
  – Detailed development timeline

• Leverage of grant funds and budgetary controls
  – Plan to leverage Choice Neighborhood Grant funds – Planning and Implementation phases
  – Fiscal accounting processes; budgetary controls (cost reasonable project expenses)
SUBMITTAL OF PROPOSAL

• Assemble proposal contents as described in RFP Section VIII

• One original hard copy – and four additional paper copies + a CD with all contents (electronic copy)
  – Proposal response
  – HUD Form 5369-A (completed and signed)
  – Proposer Certification and Affidavit Form (completed, signed and notarized)
  – All signed acknowledgments of amendments and/or addenda (if issued)
# SCHEDULE OF EVENTS

TIME IS OF THE ESSENCE!

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<thead>
<tr>
<th>Event</th>
<th>Date/Time</th>
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<tr>
<td>Proposal Issue Date</td>
<td>Friday, May 1, 2015</td>
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<tr>
<td>Pre-Proposal Conference</td>
<td>Monday, May 11, 2015 at 10:00 A.M. (Phoenix local time)</td>
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<td>251 W Washington Street, 10th Floor Conference Room</td>
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<td>Proposer’s Written Inquiries Due</td>
<td>Wednesday, May 13, 2015 by 5:00 P.M. (Phoenix local time)</td>
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<td>Proposal Due Date</td>
<td>Tuesday, May 26, 2015 by 12:00 P.M. (Phoenix local time)</td>
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<td>Finalist Interviews (if necessary)</td>
<td>Wednesday, June 3, 2015</td>
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<td>Evaluation Panel Makes Selection (Estimated)</td>
<td>Monday, June 8, 2015</td>
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<td>City Council Approval (Estimated)</td>
<td>Wednesday, June 17, 2015</td>
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QUESTIONS

• Written questions to be collected by HOU staff
• Staff will read and respond to questions
• Q & A’s to be posted on RFP solicitation website
THANK YOU FOR ATTENDING

Public Housing
East Asset Management Project

City of Phoenix