



Angela D. Alsobrooks
County Executive

**PRINCE GEORGE'S COUNTY
DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT**

**REQUEST FOR QUALIFICATIONS
NO. 2020-01**

REAL ESTATE ANALYSIS AND UNDERWRITING SERVICES

ISSUE DATE

July 2, 2020

DEADLINE FOR SUBMISSION

5 PM – July 17, 2020

**Contact: Pamela Wilson
Housing Development Program Manager
Department of Housing and Community Development
pawilson@co.pg.md.us
301-883-5551**

WARNING: *Prospective applicants who have received this document from a source other than the Issuing Office should immediately contact the Issuing Office and provide their name and mailing address in order that amendments to the RFQ or other communications can be sent to them. Any prospective applicant who fails to notify the Issuing Office of this information assumes complete responsibility, in the event that they do not receive communications from the Issuing Office prior to the closing date.*

This document is available from the Prince George's County Department of Housing and Community Development's webpage at <https://www.princegeorgescountymd.gov/1061/Public-Notices>.



I. Introduction

The Prince George's County Department of Housing and Community Development ("DHCD", or the "Department") in partnership with Kaiser Permanente ("Partner"), is seeking proposals from qualified housing and community development consultants (the "Consultant") with expertise and demonstrated experience in real estate analysis, affordable housing finance and underwriting to assist with the evaluation and underwriting of Right of First Refusal Offers ("ROFR") submitted to DHCD, with a specific focus on multi-family rental properties along the Purple Line Corridor.

The purpose of this Request for Qualification ("RFQ") is to identify and retain professional services to assist the Department in addressing affordable housing preservation issues and establishing strategies and financing alternatives to support and maintain affordable housing in transforming areas of the County through DHCD's ROFR. DHCD's ROFR operates in accordance with Sections 13-1113 through 13-1119 of the Prince George's County Code of Ordinances, as thereafter amended pursuant to CR-51-2015. These transforming areas can be identified as those communities and neighborhoods bordering or in close proximity to the Purple Line light rail system currently under construction in Central Prince George's County. The initial contract term is expected to be for a period of no more than twelve months.

II. Qualification Submission

Four (4) copies and one (1) original copy bound in a three-ring binder, and an electronic copy must be submitted. Please submit electronic copy to Pamela Wilson, Housing Development Program Manager, pawilson@co.pg.md.us.

All proposals submitted in response to this RFQ must be formatted in the sequence noted below. Each section must be separated and labeled by numbered dividers (tabs) so that each tab can be located without opening the submission. The following information/documentation are to be included behind each tab:

- I. Cover Page - Profile Form
- II. Technical Statement
 - a. Narrative describing service delivery approach
 - b. Description of services offered
 - c. Description and status of comparable project experience
- III. Examples of Related Work
- IV. Cost Proposal
- V. Resume(s)
- VI. Insurance
- VII. References

The cover page of each submission is attached hereto and incorporated herein by reference as **Attachment A**. It must be completed and submitted as part of the Consultant's proposal. Additionally, an acknowledgement that the Consultant's proposal will remain in effect for sixty (60) days after submission to DHCD must be included with the Consultant's submission.

III. Scope of Services

The Consultant(s) selected will provide DHCD with all or a portion of the services described below, which shall include, but not be limited to the following:

- a) Examining market conditions and existing conditions for affordable housing acquisitions along the Purple Line Corridor. The analysis will review trends such as changes in rents, sale prices, vacancy, and the rate of absorption.
- b) Developing real estate pro formas to test the value, assumptions and financial implications of various proposals from ROFR properties offered to the Department.
- c) Analyzing the implications of exercising different public policy levers on development and their impact on affordable housing, changes to tax abatement programs (i.e. payment in lieu of taxes), and alternative financing structures.
- d) Developing narratives to support engagement and negotiations with key stakeholders and attending and participating in meetings with key stakeholders.
- e) Supporting DHCD in the negotiation of key business terms in its real estate transactions.
- f) Lead underwriting analysis, prepare written narratives of the underwriting assumptions and findings along with an action recommendation to the Department.
- g) Evaluating assessed multi-family housing valuations, tax abatements and tax rates for residential multifamily rental properties recently sold and offered to the County for purchase.
- h) Preparing revenue forecast reports in connection with affordable housing acquisition, rehabilitation, and presenting these reports to DHCD.
- i) Preparing feasibility reports or any other real estate related reports.
- j) Provide and assist DHCD staff with analytical analysis tools such as specific underwriting spreadsheets and/or software.
- k) Attending all meetings (internal and external) and telephone conferences as necessary.

IV. Technical Statement

The technical statement must contain a description of the consultant's proposed approach to performing the scope of service and demonstrate the appropriate qualifications with specific references to:

- a) Narrative describing service delivery approach.
- b) Description of any special services required.
- c) Description of services offered by the consultant that supports the scope of services.
- d) A description and status of comparable project experience for other public entities with an emphasis on affordable housing and housing preservation.
- e) Pertinent examples of related work prepared by the consultant.
- f) Statement of Qualifications consisting of:
 - a. Qualifications responses
 - b. Resume of Professional staff
 - c. Cost Proposal

V. Qualifications Evaluation Criteria

DHCD will follow a Qualifications Based Selection (QBS) process for selecting the preferred Consultant(s). The Consultant will be asked to demonstrate expertise and experience in all skill areas that may be appropriate to the work required in the Scope of Services. All RFQs received will be reviewed and evaluated by a selection committee that may be comprised of representatives of DHCD, Kaiser Permanente and or other stakeholders. Prospective consultant(s) will be required to participate in an interview and provide a presentation to the selection committee.

a. Evaluation Criteria

| Criteria | Point Value |
|--|--------------------|
| Affordable housing underwriting experience and capacity | 25 |
| Understanding of work to be performed | 25 |
| Project organizational skills | 15 |
| Professional expertise with state and local government | 20 |
| Prior analytical experiences relative to the scope of services | 25 |
| Completeness, feasibility and quality of RFQ response | 15 |
| Clarity and conciseness of submittal | 15 |
| TOTAL | 140 |

The selected consultant will be notified of their selection within 14 days from the culmination of the interview process and contract negotiations will commence immediately upon notification. A 10-day fee negotiation period will be provided for the selected consultant and DHCD to finalize the contract fees, scope of services and agreement. The selection committee will develop an independent estimate for the defined scope of work prior to receipt or review of the most highly qualified consultant's cost proposal. The independent estimate shall serve as the basis for negotiations of the fee for services. At the end of the 10-day negotiation period, the contract will be awarded. If a negotiated fee cannot be mutually agreed to by both parties, DHCD will terminate negotiations and begin negotiating with the second ranked consultant.

The consultant awarded the contract as a result of being pre-qualified under this RFQ, must meet all municipal, state and federal affirmative action and equal employment opportunity practices.

b. Interview

DHCD will form a selection committee to evaluate each proposal submitted in response to this RFQ. The evaluation will be in accordance with the evaluation criteria set forth in the RFQ. DHCD reserves the right to decide whether to interview any or all of the Consultants. The panel may conduct interviews for many reasons, including to further assess a Consultant's ability to perform the scope of services or provide specific services, or to seek information related to any other evaluation criteria. The lead Consultant(s) as well as all other key personnel proposed to perform the Work, must be available to participate in the interview.

c. Fee for Service

Each submission shall provide a cost proposal that outlines current fees and the hourly rate in dollars for the tasks outlined in the above scope of services. Hourly billing rate should include all direct and indirect labor costs, overhead, and estimated reimbursable expenses. If reimbursable expenses cannot be accurately provided at this time, please provide a "not to exceed" sum for the contract period.

VI. References

The Consultant must submit a list of at least three (3) professional references that includes:

- The organization's name, point of contact, and the point of contact's professional title;
- Point of contacts' phone numbers and e-mail addresses; and
- A description of the services provided or business relationship.

VII. Basis for Contract Award

One or more contracts may be awarded to the highest technically rated respondent(s) whose qualifications is/are determined to be responsive and in the best interests of DHCD, subject to a determination that the Cost Proposal(s) are fair, reasonable, and provides the best value to DHCD given the requirements of the project.

VIII. RFQ Information at a Glance

| | |
|---------------------|---|
| DHCD Director | Estella Alexander Phone: 301-883-5531 Email: ealexander@co.pg.md.us |
| Deputy Director | Raymond Gilley Phone: 301-883-3467 Email: rgilley@co.pg.md.us |
| DHCD Contact Person | Pamela Wilson, Housing Development Program Manager Phone: 301-883-5551 Email: pawilson@co.pg.md.us |
| RFQ Availability | The RFQ will be posted on the DHCD website and in papers of general circulation and is available at: https://www.princegeorgescountymd.gov/1061/Public-Notices |
| Responses to RFQ | One (1) original and four (4) copies placed in three-ring binders, and an electronic copy submitted to: Prince George's County Department of Housing and Community Development Attention: Pamela Wilson, Housing Development Program Manager 9200 Basil Court, Suite 306 Largo, MD 20774 Electronic Copy To: pawilson@co.pg.md.us |
| Submittal Deadline | July 17, 2020 at 5:00PM Qualification statements will not be accepted after this time |

IX. Other Submission Elements

Incurred Costs

This RFQ does not commit the DHCD or any of its partners to award a contract or to pay any costs incurred in the preparation of a response to this request. Neither the DHCD nor its partners will be liable in any way for any costs incurred by respondents in replying to this RFQ.

Insurance

Prior to the assignment of the RFQ but not prior to submission of the proposal, the successful consultant(s) will be required to provide:

1. Original Certificate evidencing General Liability Coverage naming DHCD as an additional insured, together with the appropriate endorsements to the said policy reflecting the addition of DHCD as an additional insured under said policy. The policy shall provide for a minimum of \$1,000,000 each occurrence, general aggregate minimum of \$1,000,000 and a deductible no greater than \$1,000;
2. An original Certificate showing the firms or individual's automobile insurance in a combined single limit of \$1,000,000. For every vehicle utilized during the term of the contract, when not owned by the entity, each vehicle must have evidence of automobile insurance coverage with limits of no less than \$50,000/ \$100,000 and medical pay of \$5,000,
3. An original Certificate from the entity's workers Compensation Insurance carrier;(if applicable), and,
4. Certificate of Good Standing.

Personnel

The Consultant(s) shall provide the professional services identified in this Scope of Services and requested by DHCD. The proposal must identify the person or persons who will be responsible for conducting the work as listed in this scope of services, and include a copy of each person's resume, experiences with municipal/government clients and listing of references.

Contract Period

It is expected that the agreement and work covered by this RFQ and Scope of Services shall extend for approximately 12 months from the date of execution of an agreement between DHCD and the consultant(s). No delivery of services shall start without written contract issued by the DHCD.

Contract/Agreement

The successful Consultant(s) shall enter into a contract with DHCD and agree to abide by all County contractual requirements. By signing the agreement with DHCD, the Consultant(s) agrees to perform work as specified in the Scope of Services and accepts the terms and conditions set forth in the contract.

Acceptance or Rejection by DHCD

DHCD reserves the right to accept or reject any or all responses submitted for consideration, to waive any informalities and/or technicalities, or to negotiate separately in any manner necessary to serve the best interests of Prince George's County. Respondents whose responses are not accepted shall be notified in writing.

Amending or Canceling RFQ

DHCD reserves the right to amend or cancel this RFQ, prior to the due date and time, if it is deemed to be in its best interest to do so. DHCD reserves the right not to award a contract pursuant to this RFQ; DHCD reserves the right to terminate a contract awarded pursuant to this RFQ, at any time for its convenience upon ten (10) days written notice to the successful Consultant (s).

Affirmative Action

DHCD is an equal opportunity employer and requires an affirmative action policy from all consultants as a condition of doing business with DHCD. By responding to this RFQ, all consultant(s) agree to this condition of doing business with the DHCD.

Submission Protocol

It shall be the responsibility of each proposer to be aware of and to abide by all dates, times, conditions, requirements and specifications set forth within all applicable documents issued by DHCD, and any addenda and required attachments submitted. By virtue of completing, signing and submitting the

completed documents, the proposer is stating his/her agreement to comply with all conditions and requirements set forth within these documents.

The proposal package exterior must be clearly MARKED, denoted **RFQ for Real Estate Analysis and Underwriting Services** and must have the Consultant name and return address.

Proposals submitted after the published deadline will not be accepted.

X. Contact with DHCD and Addendums

All communication and correspondence must be addressed to Pamela Wilson, Housing Development Program Manager, at pawilson@co.pg.md.us. All Addendums will be posted on the website at <https://www.princegeorgescountymd.gov/1061/Public-Notices>. Once the proposal is submitted, the Consultant(s) must not make inquiries or attempt to communicate with any other DHCD staff or official pertaining to the RFQ. Failure to abide by this requirement may cause DHCD to not consider a Consultant proposal.

ATTACHMENT A: PROFILE OF FIRM FORM

1. Name of Consulting Entity: _____
2. Street Address: _____
3. City, State, Zip: _____
4. Telephone: _____ Fax: _____
Email: _____
5. Federal Tax ID Number: _____
6. Prince George's County Based Business – Yes or No: _____
7. Identify Ownership (if applicable) and/or Executive Management

| NAME | TITLE | % OF OWNERSHIP |
|------|-------|----------------|
| | | |
| | | |
| | | |

Resumes and/or executive summaries of experience and credentials must be included with Tab 3

8. Identify the individual(s) that will serve as the primary point of contact, or any other supervisory or key personnel. Please submit their resume(s) or summaries of experience and credentials under Tab 3, if different from previously listed individuals.

| NAME | TITLE |
|------|-------|
| | |
| | |

9. Professional Liability Insurance Carrier and Policy Number: _____
10. Consultant Diversity Statement: If a for-profit entity, please circle all of the following that apply to the ownership of this firm. Note: Resident (RBE), Minority (MBE), or Women-Owned (WBE) Business Enterprise qualifies by virtue of 51% or more of ownership and active management by one or more of the following:

Caucasian American

African American

Native American

Hispanic American

Asian/Pacific American

Asian/Indian American

Woman-Owned

Prince George's County Resident-Owned

Other (Specify): _____

MBE/WBE/RBE Certification Number (if applicable): _____

NOTE: CERTIFICATION NUMBER IS NOT NEEDED TO SUBMIT A QUALIFICATION STATEMENT – ENTER IF AVAILABLE

- 11. Debarred Statement: Has this firm, or any of its principal(s) or executive leadership ever been debarred from providing any services by the Federal Government, the State of Maryland, or any Local Government Agency within the State of Maryland?**

Yes or No? _____

If yes, please attach a detailed explanation on following pages, including dates, circumstances, and current status.

- 12. Disclosure Statement: Does this firm or any principals of this firm have any current or past, personal or professional relationship with any employee, or elected official of the Prince George's County Government?**

Yes or No? _____

If yes, name of such employee or elected official: _____

If yes, please attach a detailed explanation on following pages, including dates, circumstances, and current status.

- 13. Verification Statement: The undersigned Consultant hereby states that by completing and submitting this form, they are verifying that all information provided herein is, to the best of their knowledge, true and accurate, and that if DHCD discovers that any information entered herein is false, that shall entitle the DHCD to not make award or to cancel any award with the undersigned party, and invalidate their eligibility for consideration as Consultant to the agency.**

Signature

Date

Printed Name

Company Name