



Request for Proposals # 274-040323PR

Title: 4314 Poole Road Development

Issue Date: April 17, 2023

Due Date: June 9, 2023, not later than 4:00 PM EST

LATE PROPOSALS WILL NOT BE ACCEPTED

**Issuing Department:
Housing & Neighborhoods – Community & Small Business
Development**

Direct all inquiries concerning this RFP to:

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Public-Private Partnerships Coordinator
Email: Christopher.Valenzuela@raleighnc.gov

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1 INTRODUCTION

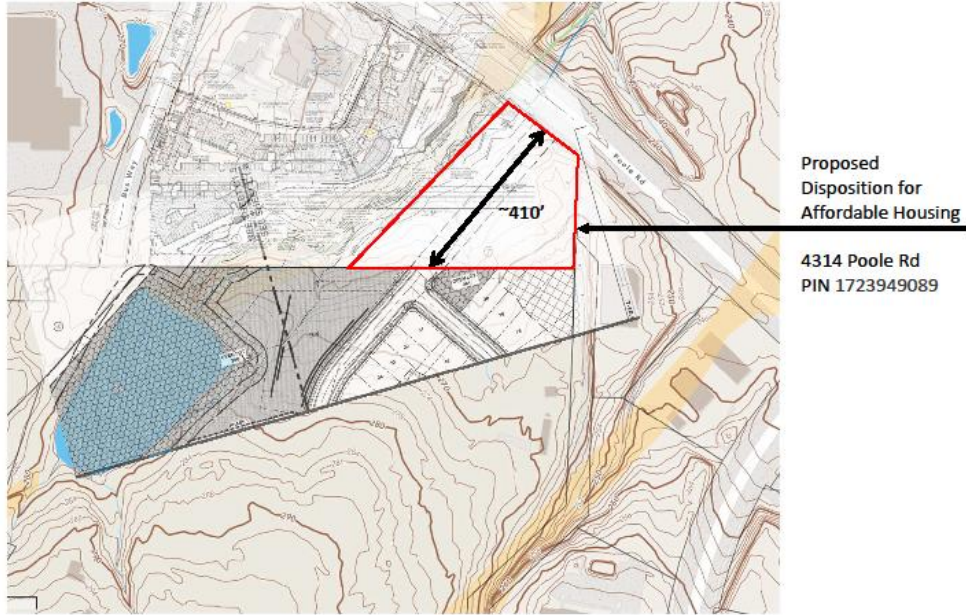
1.1 Purpose

Through this Request for Proposals (RFP), the City of Raleigh (the “City”) is soliciting proposals to contract for the following services:

The City’s Housing and Neighborhoods Department is seeking experienced, qualified developers to submit proposals for either the purchase or lease of one (1) City-owned vacant lot for the construction of attractive, sustainable, energy-efficient for-sale or rental housing on approximately 2.54 acres located at 4314 Poole Road (the “Subject Property”). To be considered, proposals must include a minimum of 20% of the total units within the development as affordable to households earning no greater than 60% of the Area Median Income (AMI), adjusted for family size, for the Raleigh, NC Metropolitan Statistical Area (MSA) as established by the U.S. Department of Housing and Urban Development (HUD). The City intends to dispose of the Subject Property either by sale or lease for construction of for-sale or rental housing. The method of disposition will depend on the nature of the selected project and will be determined by the City. Disposition will be guided by applicable state laws, which require the Proposer to provide a valuable public service benefit to the City such as affordable housing units in exchange for receiving the Subject Property by sale or lease for the construction of for-sale or rental housing. The Subject Property may be sold or leased for less than market value to the Proposer depending on the level of public service benefit provided to the City by the Proposer as a result of the project. In addition, the Proposer may also request funds from the City to subsidize site infrastructure improvements for the project; however, the level of public service benefit provided to the City by the Proposer through the project must be justified in order to be eligible to receive any subsidy. Financial subsidy provided by the City will be in a form deemed appropriate by the City, likely a low-interest loan.

The Subject Property is zoned Office Mixed-Use (OX-3), which allows for three (3) stories and 50 feet of height. Detached, attached, townhouse, and multifamily housing is permitted.

Address	Zoning	Size (Approx.)	Appraised Value (as of 2023)
4314 Poole Rd	OX-3	2.54 acres	\$668,000



A detailed scope of services is provided in Section 4 of this solicitation.

All information related to this solicitation, including any addenda, will be posted to the North Carolina Interactive Purchasing System (IPS) at: <https://www.ips.state.nc.us/IPS/>.

All questions related to this solicitation must be submitted in writing (via email) to the following individual:

Contact Name	Email Address
C.J. Valenzuela	Christopher.Valenzuela@raleighnc.gov

Questions submitted via telephone will not be answered.

1.2 **Background**

The City of Raleigh, the Capital City of North Carolina, remains one of the fastest growing areas in the country. A great economy, top educational institutions, and exceptional health care facilities are some of the characteristics that attract people to the triangle area. The mild climate, diverse work force and proximity to Research Triangle Park combine to make Raleigh a great place to live.

Raleigh is a 21st Century City of Innovation focusing on environmental, cultural, and economic sustainability. The City conserves and protects our environmental resources through best practice and cutting-edge conservation and stewardship, land use, infrastructure and building technologies. The City welcomes growth and diversity through policies and programs that will protect and enhance Raleigh's existing neighborhoods, natural amenities, history, and cultural and human

resources for future generations. The City leads to improve quality of life for neighborhoods and standard of living for all citizens. The City works with universities, colleges, citizens, and local partners to promote new technology, create new job opportunities, and encourage local businesses and entrepreneurs. The City enlists and prepares 21st Century staff with the skill sets to carry out the duties of the City through transparent civic engagement and by providing the very best customer service to our citizens.

The City’s Housing and Neighborhoods Department improves the quality of life for Raleigh’s residents by adding affordable housing, improving existing affordable housing, revitalizing older neighborhoods, and supporting related human services. The department is also committed to improving and maintaining the quality of life and environment for all City citizens by enforcing City codes. Through this department, the City periodically makes available City-owned land for projects that will add to or preserve the City’s affordable housing stock.

Preserving and expanding the supply of affordable housing is a priority for the Department and for the City. The Raleigh City Council has adopted a goal of 5,700 affordable housing units over the ten-year period from 2016 to 2026.

1.3 Request for Proposal (RFP) Timeline

Provided below is a list of the anticipated schedule of events related to this solicitation. The City of Raleigh reserves the right to modify and/or adjust the following schedule to meet the needs of the service. All times shown are Eastern Time (ET):

RFP Process	Date and time	
RFP Advertisement Date	4/17/2023	
Pre-Proposal Conference (Virtual)	5/1/2023	11:00 AM
Deadline for Written Questions	5/8/2023	4:00 PM
City Responses to Questions (anticipated)	5/19/2023	
Proposal Due Date and Time	6/9/2023	4:00 PM

1.4 Pre-Proposal Conference

A voluntary, online PRE-PROPOSAL CONFERENCE for all Prospective Proposers is scheduled for May 1, 2023, at 11:00 AM as shown in Section 1.3. Prospective Proposers are encouraged to register for the PRE-PROPOSAL CONFERENCE webinar and submit written questions in advance. A summary of all questions and answers will be posted on the internet as an addendum.

Webinar Registration Link: [Click here](#)

Webinar Meeting Link: [Click here](#)

Meeting ID: 239 981 034 931

Passcode: gPS9FQ

OR

Call-in Number: +1 919-561-6523,,375783746#

Phone Conference ID: 375 783 746#

1.5 Proposal Questions

Requests for clarification and questions to this RFP must be received by the City not later than the date shown above in the RFP Timeline (Section 1.3) for the submittal of written inquires. The firm's failure to request clarification and submit questions by the date in the RFP Timeline above shall be considered to constitute the firm's acceptance of all City's terms and conditions and requirements. The City shall issue addenda reflecting questions and answers to this RFP, if any, and shall be posted to North Carolina Interactive Purchasing System (IPS). No information, instruction or advice provided orally or informally by any City personnel, whether made in response to a question or otherwise in connection with this RFP, shall be considered authoritative or binding. Respondents shall be entitled to rely *only* on written material contained in an Addendum to this RFP.

It is important that all Respondents submitting to this RFP periodically check the North Carolina Interactive Purchasing System (IPS) for any Addenda. It is the Respondents responsibility to ensure that all addenda have been reviewed and, if required signed and returned.

All questions related to this solicitation must be submitted in writing (via email) to the following individual:

Contact Name	Email Address
C.J. Valenzuela	Christopher.Valenzuela@raleighnc.gov

Questions submitted via telephone will not be answered.

1.6 Proposal Submission Requirements and Contact Information

Proposals must follow the format as defined in Section 2 (PROPOSALS), and be addressed and submitted electronically as follows:

Send to: Christopher.Valenzuela@raleighnc.gov
Email Subject Line: RFP No. # 274-040323PR

The City will only receive Proposals through this RFP that are submitted electronically. The electronic version of the Proposal must be emailed as a viewable and printable Adobe Portable Document File (PDF). Electronic versions of the Proposal must be received by the City on or before the RFP due date and time provided in RFP Timeline (Section 1.3). Proposals received after the RFP due date and time will not be considered.

Any requirements in the RFP that cannot be met must be indicated on Appendix IV: Exceptions to the RFP and submitted with the proposal. **Proposers must respond to the entire Request for Proposals (RFP). Any incomplete proposal may be eliminated from competition at the discretion of the City of Raleigh.** The City reserves the right to reject any or all proposals for any reason and to waive any informality it deems in its best interest.

Proposals that arrive after the due date and time will not be accepted or considered. It is the responsibility of the firm to ensure that their proposal arrives by the due date and time specified in the RFP Timeline (Section 1.3).

1.7 MWBE Participation Form

The City prohibits discrimination in any manner against any person based on actual or perceived age, race, color, creed, national origin, sex, mental or physical disability, sexual orientation, gender identity or expression, familial or marital status, religion, economic status, or veteran status. The City maintains an affirmative policy of fostering, promoting, and conducting business with women and minority owned business enterprises.

Complete and submit the MWBE Participation Form (Appendix III) with your proposal.

1.8 Rights to Submitted Materials

All proposals and supporting materials, as well as correspondence relating to this RFP, shall become the property of the City. The content of all submittals will be held confidential until the selection of the firm is made. Proposals will be reviewed by the Evaluation Team, as well as other City staff and members of the general public who submit public record requests. *Any proprietary data must be clearly marked.* In submitting a Proposal, each Prospective Proposer agrees that the City may reveal any trade secret materials contained in such response to all City staff and City officials involved in the selection process and to any outside consultant or other third party who serves on the Evaluation Team or who is hired by the City to assist in the selection process.

The City reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the Proposer of the conditions contained in this Request for Proposals. Proposals marked entirely as “confidential”, “proprietary”, or “trade secret” will be considered non-responsive and will be removed from the evaluation process.

1.9 Communications

Questions must be submitted in writing to the individual designated in Section 1.1 (Purpose) prior to the deadline provided in the RFP Timeline (Section 1.3). Proposers should not rely on any information provided by the City that is not provided as part of this RFP, any addenda to this RFP, or communications with the City representative identified in Section 1.1.

1.10 Lobbying

By responding to this solicitation, the firm certifies that it has not and will not pay any person or firm to influence or attempt to influence an officer or employee of the City or the State of North Carolina, or any elected official in connection with obtaining a contract as a result of this RFP.

1.11 Conflicts of Interest

City of Raleigh contracts are controlled by three conflict of interest provisions.

First, federal procurement standards provide in 2 CFR 200.318 (c)(1),

No employee, officer, or agent may participate in the selection, award, or administration of a contract supported by a Federal award if he or she has a real or apparent conflict of interest. Such a conflict of interest would arise when the employee, officer, or agent, any member of his or her immediate family, his or her partner, or a firm which employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from a firm considered for a contract. The officers, employees, and agents of the non-Federal entity may neither solicit nor accept gratuities, favors, or anything of monetary value from contractors or parties to subcontracts.

Similarly, the North Carolina General Statutes provides a *criminal* statute for conflicts of interest in public contracting. N.C.G.S. § 14-234(a):

(1) No public officer or employee who is involved in making or administering a contract on behalf of a public agency may derive a direct benefit from the contract except as provided in this section, or as otherwise allowed by law. (2) A public officer or employee who will derive a direct benefit from a contract with the public agency he or she serves, but who is not involved in making or administering the contract, shall not attempt to influence any other person who is involved in making or administering the contract. (3) No public officer or employee may solicit or receive any gift, favor, reward, service, or promise of reward, including a promise

of future employment, in exchange for recommending, influencing, or attempting to influence the award of a contract by the public agency he or she serves.

City of Raleigh Charter Section 3.9 regulates private transactions between the City and its officials and employees. The Charter states:

No member of the City Council, official, or employee of the City of Raleigh shall be financially interested, or have any personal beneficial interest, either directly or indirectly, as agent, representative, or otherwise, in the purchase of, or contract for, or in furnishing any materials, equipment or supplies to the City of Raleigh, nor shall any official or employee of the City of Raleigh accept or receive, or agree to accept or receive, directly or indirectly, from any person, firm or corporation to whom any contract may be awarded or from whom any materials, equipment or supplies may be purchased by the City of Raleigh, by rebate, gift, or otherwise, any money or anything of value whatsoever, or any promise, obligation or contract for future reward or compensation, for recommending or procuring the uses of any such materials, equipment or supplies by the City of Raleigh; no member of the City Council, official or employee of the City of Raleigh shall for his own personal benefit operate, directly or indirectly, any concession in any building or on any lands of the City of Raleigh, nor shall any official or employee of the City of Raleigh bid for or be awarded any contract granting concessionary rights of any nature or kind from the City of Raleigh; it shall be unlawful for any member of the City Council, official or employee of the City of Raleigh to bid for or to purchase or to contract to purchase from the City of Raleigh any real estate, equipment, materials, or supplies of any nature or kind whatsoever, either directly or indirectly, at either public or private sale, either singly, or through or jointly with any other person.

1.12 Proposer Expenses

The City will not be responsible for any expenses incurred by any Proposer in the development of a response to this RFP or any other activities associated with this procurement including but not limited to any onsite (or otherwise) interviews and/or presentations, and/or supplemental information provided, submitted, or given to City of Raleigh and/or its representatives. Further, the City shall reserve the right to cancel the sale or lease described herein prior to final approval by the City Council.

1.13 Proposer Acceptance

Submission of any proposal indicates a Proposer's acceptance of the conditions contained in this RFP unless clearly and specifically noted otherwise on Appendix IV, Exceptions to RFP, and submitted with proposal. Further, the City has the sole discretion and reserves the right to cancel this RFP, and to reject any and all proposals, to waive any and all informalities and/or irregularities and reserves the right to re-advertise this RFP with either the identical or revised scope and specifications if it is deemed to be in the best interests of the City to do so. The City reserves the right to accept or reject any or all of the items in the proposal, and to award the contract in whole or in part and/or negotiate any or all items with individual Proposers if it is deemed in the best interest of the City to do so. Moreover, the City

reserves the right to make no selection if proposals are deemed to be not in the best interest of the City.

2 PROPOSALS

Responses must follow the format outlined below. The City may reject as non-responsive at its sole discretion any proposal that does not provide complete and/or adequate responses or departs in any substantial way from the required format.

2.1 Request for Proposals Required Document Format

Responses should be divided using tabs to separate each section, listed sequentially as follows:

Tab 1: Cover Letter

Provide an introduction letter summarizing the unique proposal of your firm to meet the needs of this RFP. The letter should express why the Proposer is interested in undertaking the project and why they should be selected. This letter should be presented on the firm's official letterhead and signed by an authorized representative who has the authority to enter into a contract with the City on behalf of the firm. Additionally, include the name, address, telephone and email address of the individual who serves as the point of contact for this solicitation.

Tab 2: Team Experience and Certifications

Include background information on the firm and provide detailed information regarding the firm's development experience with similar projects. Provide a list of all similar contracts performed in the past five (5) years, accompanied by at least three (3) references (see Appendix II). Include the total cost for each listed project, the length/timeline of the project, and a list of those involved in the project who are also proposed for the subject project in this RFP. Failure to provide a list of all similar contracts in the specified period may result in the rejection of the firm's proposal. The evaluation team reserves the right to contact any or all listed references, and to contact other public entities regarding past performance on similar projects.

This section must also include the proposed staffing of firm personnel to be assigned to this project. The Proposer shall provide information as to the experience of all personnel to be assigned to this project, including resumes citing experience with similar projects and the responsibilities to be assigned to each person. A project-specific organizational chart which clearly illustrates the roles, responsibilities, and the reporting relationships of each team member should be included.

Tab 3: Project Approach, Timeline, and Budget

Provide a comprehensive narrative or outline demonstrating the firm's understanding and approach to accomplishing the work outlined in the Scope of Work section of this RFP. The proposal should also include a description of proposed marketing and community engagement efforts to be undertaken if selected.

Provide a complete project timeline broken out by each stage of the development process (i.e., pre-development stage, construction stage, etc.) and include a detailed description for each major task throughout the development lifecycle.

For rental and/or for-sale projects, include an itemized total budget estimate for the proposed project, including preliminary sources and uses. The financial model should include the total number of units, unit types (i.e., single-family, townhouse, duplex, apartment, ADU, etc.), income targeting of units (i.e., income level as defined by percentage of AMI, or “market rate” for units without income restrictions), projected rents and/or sales prices, and number of bedrooms and square footage for each unit. Rental projects should also include a 30-year pro forma. For-sale projects should also include a for-sale construction pro forma with an appropriate timeline (at a minimum, assume 90 days from construction completion to sale for each unit).

Tab 4: Site Plan and Renderings

Include a conceptual site plan of the proposed project. If available, also include any renderings and/or architectural plans for the proposed project.

2.2 RFP Documents

This RFP is comprised of the base RFP document, any attachments, and any addenda released before Contract award. All attachments and addenda released for this RFP in advance of any Contract award are incorporated herein by reference.

3 PROPOSAL EVALUATION

3.1 Proposal Evaluation Criteria

This is not a bid. There will not be a public opening. The Proposals received in response to this RFP will be evaluated and ranked, by the Evaluation Team in accordance with the process and evaluation criteria contained below. Responses will be evaluated in light of the material and substantiating evidence presented in the response, and not on the basis of what is inferred. After thoroughly reading and reviewing this RFP, each Evaluation Team member shall conduct his or her independent evaluation of the proposals received and grade the responses on their merit in accordance with the evaluation criteria set forth in the following table.

While the scoring criteria described in this section are intended to help inform the City’s selection of a Proposal, the City reserves the right to select the best overall proposal when measured against the City’s strategic policy priorities, including, but not limited to the City’s Strategic Plan, Comprehensive Plan, and any redevelopment plans adopted by the City Council.

A summary of the scoring criteria and maximum points is shown in the table below. More detailed descriptions are in the narrative below the table.

Criteria	Max Points
Marketing, Income Targeting, and Long-Term Affordability	30
Financial Feasibility	20
Development Quality	30
Development Team Experience and Qualifications	30
Total Points Possible	110

Marketing, Income Targeting, and Long-Term Affordability (30 points)

Proposals will be evaluated based on the level of affordability proposed as well as the strength of the marketing/community outreach plan.

Marketing (5 points)

Proposers must include a marketing plan in Tab 3 of the proposal. The marketing plan should describe outreach efforts to reach potential low- and moderate-income buyers and/or renters. The selected developer will be expected to maintain contact and waiting lists, including dates of contact with interested buyers and/or renters. The marketing plan should also note what organization(s) will partner in outreach efforts. Proposers are encouraged to include a real estate professional who is either current certified or enrolled to become certified as a Workforce Housing Specialist by the North Carolina Association of REALTORS® on their marketing team.

Income Targeting (15 points)

Proposers must include the unit mix and income targeting in Tab 3 of the proposal. All proposals must include a minimum of 20% of the total units within the development as affordable to households earning no more than 60% of the AMI, adjusted by family size. Points will be awarded on a sliding scale based on the number or percentage of affordable housing units proposed and depth of income targeting (i.e., units affordable to households earning 30% AMI, 60% AMI, etc.).

Long-Term Affordability (10 points)

Long-term affordability is a high priority for the City. Proposals should explain efforts and requirements to preserve long-term affordability for units proposed. Points will be awarded on a sliding scale based on the information provided.

Financial Feasibility (20 points)

Proposers must demonstrate that the project is financially feasible. Reasonableness of project costs, demonstrated access to capital, and capital structure will be considered during the evaluation. The Subject Property may be sold or leased for less than market value to the Proposer depending on the level of public service benefit provided to the City by the Proposer as a result of the project. In addition, the

Proposer may request funds from the City to subsidize site infrastructure improvements for the project; however, the level of public service benefit provided to the City by the Proposer through the project must be justified in order to be eligible to receive any subsidy. Financial subsidy provided by the City will be in a form deemed appropriate by the City, likely a low-interest loan.

Reasonableness of Project Costs (10 points)

Points will be awarded on a sliding scale based on reasonableness of project costs.

Leveraging and Capital Structure (10 points)

Points will be awarded on a sliding scale based on the degree to which available funding sources, to include other public and private sources, are leveraged in the proposed project and the reasonableness of the proposed capital stack.

Development Quality (30 points)

Proposals will be evaluated on how well the units blend into the existing community character and compatibility with surrounding architecture. Proposed buildings should include glazing on all elevations/facades. Proposals will also be evaluated based on sensitivity to the natural environment. All new construction must meet or exceed SystemVision certifications or comparable. Proposers should embrace all possible sustainability measures, to include conservation and protection of environmental resources, green building standards, use of high-performance building materials and design, water conservation, recycling of construction and residential waste and energy efficiency. Proposers should describe any visitability or aging in place elements that will be incorporated into the design. Proposals should include representative floor plans and elevations and conceptual site plans (Tab 4).

Note: If applicable, proposers are encouraged to go through the Sketch Plan Review process with the City of Raleigh Planning and Development Department to determine feasibility of the proposal under the City's Unified Development Ordinance, including any stormwater requirements. Information related to these reviews can be found at:

<https://raleighnc.gov/permits/sketch-plan-review>

Compatibility with Surrounding Architecture and Context (15 points)

Points will be awarded on a sliding scale based on the project design's compatibility with surrounding architecture and neighborhood context.

Sustainability and Accessibility Measures (15 points)

Points will be awarded on a sliding scale based on the project's sustainability and accessibility features. Such features may include but are not limited to: high performance building design and materials, adherence to green building standards, recycling measures during construction, and Universal Design or other accessibility/visitability features.

Development Team Experience and Qualifications (30 points)

Proposals must describe the development team's experience and qualifications in Tab 2 of the proposal. The development team must demonstrate prior successful experience with comparable size and type projects. Prior track record and current project status will be considered for firms that have worked with the City before.

Demonstration of Development Experience (15 points)

Points will be awarded on a sliding scale based on demonstration of the Proposer's prior experience with development projects of comparable size and type. Consideration in this category will include the Proposer's full team, as applicable, not just the lead firm.

Evidence of Financial Capacity to Execute Project (15 points)

Points will be awarded on a sliding scale based on evidence of the Proposer's financial capacity to execute the proposed project. Past performance and current project status will be considered for firms that have previously worked with the City; points will be awarded based on a firm's track record of financial and project management and demonstrated ability to meet project deadlines.

3.2 Proposal Selection

Proposals will be evaluated and ranked by the Evaluation Team according to the criteria and weighted values set forth in Section 3.1. After the Evaluation Team has evaluated and ranked the proposals based on the criteria and weighted values as set forth in Section 3.1, a final selection for recommendation will be made at this time, after which negotiations of a contract with the most qualified firm will commence. If negotiations are unsuccessful, the City will then pursue negotiations with the next most qualified firm. All Proposers will be notified of their standing immediately following the City's decision.

The City shall not be bound or in any way obligated until both parties have executed a contract. The City also reserves the right to delay the award of a contract or to not award a contract.

3.3 Notice to Proposers Regarding RFP Terms and Conditions

It shall be the Proposer's responsibility to read the Instructions, all relevant exhibits, attachments, and any other components made a part of this RFP and comply with all requirements and specifications herein. Proposers are also responsible for obtaining and complying with all Addenda and other changes that may be issued in connection with this RFP.

3.4 Contract Term

The obligation of the City to either sell or lease the Subject Property for construction of a for-sale or rental housing project is contingent upon site plan approval, issuance of building permits, due diligence conditions being satisfied, and firm financial commitments for construction and/or permanent financing. If construction does not substantially commence within six (6) months of initial closing, the City may, at its

option, exercise recapture remedies. The method of disposition for either the sale or lease of the Subject Property will be determined by the City and guided by applicable state laws, which require the Proposer to develop a project that provides a valuable public service benefit to the City. The Subject Property will either be sold or leased in “as-is” condition for the construction of a for-sale or rental housing project and the selected Proposer will be allowed a sufficient period to perform reasonable due diligence before closing. At closing, the Subject Property may be subjected to covenants requiring the selected Proposer (and successors) to adhere to requirements associated with affordability, occupancy, and any other conditions of either the sale or lease negotiated between the selected Proposer and the City.

4 SCOPE OF WORK

The selected Proposer shall complete the development of for-sale or rental housing and associated infrastructure on the Subject Property, all as set forth in this RFP and more particularly described in this Section 4.

4.1 Subject Property Overview

The Subject Property consists of a trapezoidal parcel totaling 2.54 acres, with approximately 190 feet of frontage along Poole Road to the north, an existing commercial use to the east, and a Go Raleigh Park and Ride public transit facility to the west. To the south sits a property currently being developed into low-income housing by Habitat For Humanity. The site’s existing zoning is OX-3, which allows a height of three stories and 50 feet. Detached, attached, townhouse, and multifamily housing types are permitted.

4.2 Development Expectations and Considerations

The site plan must accommodate a street connecting Poole Road and the street stub of Ridge Rock Road that is being constructed as part of the Habitat for Humanity project to the south. This street must continue the same cross section of Ridge Rock Road, including sidewalks.

The Subject Property is currently devoid of development besides a power line running east-west across the site, requiring a 50-foot utility easement which may include other possible conditions as dictated by Duke Energy. In addition, a tributary of Crabtree Creek runs directly adjacent to the western site boundary, which may require an open space easement on the western edge of this property. This tributary may also have “blue line stream” protections that may be applicable to this same edge of the site. The lot has access to paved public streets and City water and sewer.

Buildings must, at a minimum, meet the applicable state and local building codes and ordinances. Proposers should also be familiar with NCG01 and all other applicable stormwater regulations.

The City intends to dispose of the Subject Property either by sale or lease for construction of for-sale or rental housing. The method of disposition will depend on

the nature of the selected project and will be determined by the City. Disposition will be guided by applicable state laws, which require the Proposer to provide a valuable public service benefit to the City such as affordable housing units in exchange for receiving the Subject Property by sale or lease for the construction of for-sale or rental housing. The Subject Property may be sold or leased for less than market value to the Proposer depending on the level of public service benefit provided to the City by the Proposer as a result of the project. In addition, the Proposer may request funds from the City to subsidize site infrastructure improvements for the project; however, the level of public service benefit provided to the City by the Proposer through the project must be justified in order to be eligible to receive any subsidy. Financial subsidy provided by the City will be in a form deemed appropriate by the City, likely a low-interest loan.

Proposers are expected to have examined the Subject Property to understand existing visible site conditions and to factor all development needs into their proposal. The City will require proposals to address all site needs and land planning including but not limited to: stormwater mitigation, additional grading, any necessary clearing including tree and stump removal, plantings to stabilize any slopes, replacing extra curb cuts with curb and gutter, and repairing or replacing any adjacent curbs and/or sidewalks to ensure a high-quality development. The developer will be solely responsible for securing any variances that are necessary to completing the development. Any proposed variance applications should be included in the developer's schedule to purchase and construct the development.

The City reserves the right to require the developer to furnish bonds covering faithful performance and payment of obligations for the development.

Developers are encouraged to include a real estate professional who is either currently certified or enrolled to become certified as a Workforce Housing Specialist by the North Carolina Association of REALTORS® on their marketing team. More information can be found at: <http://www.ncrealtors.org/certificate-program-certificate-program-menu.html>

The developer (and property manager, if applicable) must comply with the income and rent/sales price limits described in Section 4.4.

4.3 Developer Responsibility

The successful developer will be responsible for securing construction financing, completing all necessary site planning, any infrastructure necessary (including, but not limited to, the required street extension, installation of water and sewer taps, storm drainage, etc.) constructing the development, marketing, application intake, selling or renting all housing units to qualified households within 36 months of the date of closing. The developer is required to provide a construction schedule clearly outlining the sequence of activities with the resources necessary to complete the project in the most efficient time. This schedule should include all land planning efforts necessary to ensure efficient development of the site.

The development of this Subject Property should be consistent with all existing zoning and building code requirements including all tree protection and storm water regulations. All proposals should include a site plan comprising but not limited to: Building elevations, building setback(s), proposed amenities, sidewalks, and landscaping.

The developer will be responsible for conducting any necessary surveys and recording plats for the development site(s).

4.4 Affordability Conditions

All proposals must include a minimum of 20% of the total units within the development as affordable to households earning no more than 60% of the AMI, adjusted by family size, for the Raleigh, NC MSA, as established by HUD. Any non-affordable units (i.e., market-rate units) within the development will not be subject to any affordability requirements (e.g., income limits, rent and/or sales price limits).

Household income limits, income verification, and rent and/or sales price limits for the affordable units must be reviewed and approved prior to initial occupancy (and upon subsequent lease renewals for rental units) by the City Housing and Neighborhoods staff.

Current income limits by income level (AMI percentage) and household size, along with rent limits by income level and unit size, are shown below (effective as of April 18, 2022). Sales price limits will be determined by the City in consultation with the selected developer and dependent on guidelines and restrictions associated with any other proposed funding sources to be used in the project.

Income Limits

Income Level	Household Size							
	1	2	3	4	5	6	7	8
30%	\$22,500	\$25,700	\$28,900	\$32,100	\$34,700	\$37,250	\$39,850	\$42,400
40%	\$29,960	\$34,240	\$38,520	\$42,800	\$46,240	\$49,680	\$53,080	\$56,520
50%	\$37,450	\$42,800	\$48,150	\$53,500	\$57,800	\$62,100	\$66,350	\$70,650
60%	\$44,940	\$51,360	\$57,780	\$64,200	\$69,360	\$74,520	\$79,620	\$84,780
70%	\$52,430	\$59,920	\$67,410	\$74,900	\$80,920	\$86,940	\$92,890	\$98,910
80%	\$59,950	\$68,500	\$77,050	\$85,600	\$92,450	\$99,300	\$106,150	\$113,000

Rent Limits

Income Level	Number of Bedrooms					
	Efficiency	1	2	3	4	5
30% AMI	\$561	\$601	\$722	\$834	\$931	\$1,027
40% AMI	\$749	\$802	\$963	\$1,113	\$1,242	\$1,370
50% AMI	\$936	\$1,003	\$1,203	\$1,391	\$1,552	\$1,712
60% AMI	\$1,123	\$1,203	\$1,444	\$1,669	\$1,863	\$2,055
70% AMI	\$1,310	\$1,404	\$1,685	\$1,947	\$2,173	\$2,397
80% AMI	\$1,496	\$1,605	\$1,926	\$2,226	\$2,484	\$2,740
City Utility Allowances	<i>Must be determined for each individual apartment or identical apartments in a project</i>					

APPENDIX I: PROPOSER QUESTIONNAIRE

The following questions must be answered, and data given must be clear and comprehensive. If necessary, questions may be answered on separate sheets. The Proposer may submit any additional information desired.

Company Name:		d/b/a (if applicable)	
Street / PO Box:			
City:		State:	Zip:
Phone:	Fax:	E-Mail:	
Website (if applicable):			
<input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation <input type="checkbox"/> Other			
Number of years in business under company's present name:			
Fed Tax ID #:	DUNS #		
Are you registered with the North Carolina Secretary of State to conduct business (if required)? (Check One) YES: <input type="checkbox"/> NO: <input type="checkbox"/> Not Applicable: <input type="checkbox"/>			
Are you properly licensed/certified by the Federal and/or State of North Carolina to perform the specified work? YES: <input type="checkbox"/> NO: <input type="checkbox"/> Not Applicable: <input type="checkbox"/> ATTACH COPY OF ALL APPLICABLE LICENSING/CERTIFICATION DOCUMENTS			
Are/will you be properly insured to perform the work? YES: <input type="checkbox"/> NO: <input type="checkbox"/>			
Contact for this Contract:		Title:	
Phone:	Fax:	E-Mail:	
Have you ever defaulted or failed on a contract? (If yes, attach details) YES: <input type="checkbox"/> NO: <input type="checkbox"/>			
List at least three (3) references for which you have provided these services (same scope/size) in the past three years - preferably government agencies. <u>Do not include City of Raleigh as a reference to meet the requirement of listing at least (3) references.</u> PROPOSERS ARE RESPONSIBLE FOR SENDING REFERENCE QUESTIONNAIRE (APPENDIX II) TO THEIR REFERENCES.			
1.	Company:		
Contact Person:		Title:	
Phone:	Fax:	E-Mail:	
Describe Scope of Work:			
2.	Company:		
Contact Person:		Title:	
Phone:	Fax:	E-Mail:	
Describe Scope of Work:			
3.	Company:		
Contact Person:		Title:	
Phone:	Fax:	E-Mail:	
Describe Scope of Work:			
4.	Company:		
Contact Person:		Title:	
Phone:	Fax:	E-Mail:	
Describe Scope of Work:			
5.	Company:		
Contact Person:		Title:	

Phone:		Fax:		E-Mail:	
Describe Scope of Work:					
The undersigned swears to the truth and accuracy of all statements and answers contained herein:					
Authorized Signature:		Date:			

APPENDIX II: REFERENCE QUESTIONNAIRE (Instructions)

**City of Raleigh
RFP # 274-040323PR**

The City of Raleigh, as a part of the RFP, requires proposing companies to submit a minimum of three (3) business references as required within this document. The purpose of the references is to document the experience of the Proposer relevant to the scope of services and assist in the evaluation process.

- The Proposer is required to send the reference form (the following two pages) to each business reference listed on Proposer Questionnaire.
- The business reference, in turn, is requested to submit the Reference Form directly to the City of Raleigh Point of Contact identified on the Reference Questionnaire form for inclusion in the evaluation process.
- The form and information provided will become a part of the submitted proposal. The business reference may be contacted for validation of the response.
- It is the Proposer's responsibility to verify their references have been received by the City of Raleigh Point of Contact by the date indicated on the reference form.

APPENDIX II: REFERENCE QUESTIONNAIRE FORM

City of Raleigh RFP # 274-040323PR

(Name of Business Requesting Reference)

This form is being submitted to your company for completion as a business reference for the company listed above.

This form is to be returned to the City of Raleigh, C.J. Valenzuela, via email to Christopher.Valenzuela@raleighnc.gov no later than **4:00 p.m. EST, June 9, 2023** and **MUST NOT** be returned to the company requesting the reference.

For questions or concerns regarding this form, please contact the City of Raleigh, Point of Contact above.

Company Providing Reference

Contact Name and Title/Position

Contact Telephone Number

Contact Email Address

Questions:

1. In what capacity have you worked with this company in the past? If the company was under a contract, please acknowledge and explain briefly whether or not the contract was successful.

Comments:

2. How would you rate this company's knowledge and expertise?

3= Excellent 2= Satisfactory 1= Unsatisfactory 0= Unacceptable

Comments:

3. How would you rate the company's flexibility relative to changes in the scope and timelines?

3= Excellent 2= Satisfactory 1= Unsatisfactory 0= Unacceptable

Comments:

4. What is your level of satisfaction with hard-copy materials, e.g., reports, logs, etc. produced by the company?

3= Excellent 2= Satisfactory 1= Unsatisfactory 0= Unacceptable

Comments:

5. How would you rate the dynamics/interaction between the company and your staff?

3= Excellent 2= Satisfactory 1= Unsatisfactory 0= Unacceptable

Comments:

6. Who were the company's principle representatives involved in providing your service and how would you rate them individually? Would you comment on the skills, knowledge, behaviors or other factors on which you based the rating?

(3= Excellent; 2= Satisfactory; 1= Unsatisfactory; 0= Unacceptable)

Name: _____	Rating: _____
Name: _____	Rating: _____
Name: _____	Rating: _____
Name: _____	Rating: _____

Comments:

7. With which aspect(s) of this company's services are you most satisfied?

Comments:

8. With which aspect(s) of this company's services are you least satisfied?

Comments:

9. Would you recommend this company's services to your organization again?

Comments:

APPENDIX III: MWBE FORM

IDENTIFICATION OF MWBE PARTICIPATION FOR FORMAL CONTRACTS

Contract amount is ≥ (greater than or equal to) \$300,000.00

This Identification of MWBE Participation Form is for the purpose of capturing information regarding the utilization of MWBEs and other subcontractors and suppliers on Formal City Contracts. MWBE participation is encouraged for all City of Raleigh contracting opportunities. Please refer to the City's MWBE Policy for any contract specific requirements. *Copy this Form as needed.*

COMPANY NAME			
PROJECT NAME			
PROJECT NUMBER		CITY DEPARTMENT	
CONTRACT TYPE	<input type="checkbox"/> Services <input type="checkbox"/> Other _____*		
<input type="checkbox"/> PRIME IS MWBE	Classification: _____ <input type="checkbox"/> Certified with NCHUB <input type="checkbox"/> Certified with NCDOT-DBE	RFP SUBMITTAL DATE	

MWBE Classifications:

American Indian (AI), Asian American (AA), Black/African-American (B), Hispanic (H), Non-Minority Female (NMF), Socially/Economic Disadvantaged (D)

WORK TO BE SELF-PERFORMED

Check this box **only** if you intend to perform 100% of the work for this Contract with your own current work forces, and you normally perform and have the capability to perform all elements of this work for this Contract with your own current work forces.

MWBE SUBCONTRACTORS

Complete the chart below for all MWBE subcontractors that you intend to use for this Contract regardless of dollar amount.

Company Name	MWBE Classification*	Description of Services	Percentage of Total Contract	Total Projected Utilization (\$)

*MWBE Classifications:

American Indian (AI), Asian American (AA), Black/African-American (B), Hispanic (H), Non-Minority Female (NMF), Socially/Economic Disadvantaged (D)

Total Estimated MWBE Utilization* \$ _____

Total Proposal Amount* \$ _____

Percent Estimated MWBE Utilization* _____ %

(Total Estimated MWBE Utilization divided by Total Bid Amount)

APPENDIX IV: EXCEPTIONS TO THE RFP

CHECK ONE:

- NO EXCEPTIONS, PROPOSER COMPLIES WITH ALL DOCUMENTS IN RFP.
- EXCEPTIONS ARE LISTED BELOW:

#	RFP Page #, Section, Name, Title, Item #	Exceptions (Describe nature of Exception)	Explain Why This is an Issue	Proposed Alternative	Indicate if exception is Negotiable (N), or Non-negotiable (NN)
1					
2					
3					
4					
5					
6					
7					
8					

9					
10					
11					
12					

FAILURE TO IDENTIFY ANY EXCEPTIONS WILL INDICATE ACCEPTANCE OF ALL TERMS AND CONDITIONS, AND REQUIREMENTS OF THE RFP AND ANY CORRESPONDING ADDENDUM ISSUED. THE CITY, AT ITS SOLE DISCRETION, MAY MODIFY OR REJECT ANY EXCEPTION OR PROPOSED CHANGE.

Firm:	Authorized Signature:	Title:
Printed Name of Signer:		Date: