



Town of Eatonville
Community Redevelopment Agency
370 E. Kennedy Blvd
Eatonville, FL 32751
407-960-1361
support@eatonvillecra.org
www.eatonvillecra.org

**RFP FOR CONSULTING SERVICES TO PREPARE AN
AFFORDABLE HOUSING LINKAGE FEE
NEXUS AND FEASIBILITY STUDY**

REQUEST SUMMARY

The Town of Eatonville CRA is seeking proposals from qualified firms to prepare an Affordable Housing Linkage Fee Nexus and Feasibility Study.

GENERAL RFP SUBMITTAL INFORMATION

The CRA's designated staff will evaluate proposals received. During the review process, the CRA reserves the right, where it may serve the CRA's best interest, to request additional information or clarification from those that submit proposals, or allow clarifications, corrections of errors, or omissions. Any and all changes in the RFP will be made by written addendum, which shall be issued by the CRA to all prospective proposers who have registered for the RFP via the CRA's website.

The CRA reserves the right to retain all proposals submitted. Submission of a proposal indicates the Proposer's acceptance of the conditions contained in this RFP, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the CRA and the Proposer selected.

The preparation of the proposal will be at the total expense of the Proposer. There is no expressed or implied obligation for the CRA to reimburse responding Proposers for any expense incurred in the preparation of proposals in response to this request. All proposals submitted to the CRA shall become properties of the CRA and will not be returned. If any information in your proposal is confidential and/or proprietary, please further submit a separate, redacted copy for servicing public records requests.

The Proposer may submit an alternative proposal (or proposals) that it believes will also meet the CRA's project objectives but in a different way. In this case, the proposer must provide an analysis of the advantages and disadvantages of each of the alternatives, and discuss under what circumstances the CRA would prefer one alternative to the other(s). If an alternative proposal is submitted, the maximum length of the proposal may be expanded proportionately by the number of alternatives submitted.



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The CRA reserves the right to reject any or all proposals, in whole or part, to waive any informality in any proposal, and to accept the proposal which, in its discretion, is in the best interest of the CRA. Any proposer may withdraw his proposal, without obligation, at any time prior to the scheduled closing time for receipt of proposals. A withdrawal will not be effective unless made personally or by telephonic notification received prior to the closing date. Proposals may later be referred to the CRA Council for appropriate action.

All proposals are due not later than 5:00 p.m. on Friday, July 10th, 2020 at which time they will be recorded at the Fiscal Coordinator Desk at 370 E. Kennedy Blvd, Eatonville, Florida 32751. Late submissions will not be accepted. To be considered, proposers must send one (1) color original, one (1) USB flash drive with a searchable PDF copy of the proposal in its entirety and three (3) hard copies of their proposal in a sealed envelope with the name of the company submitting the proposal and the title of “**RFP #2020 – 27 RFP for Consulting Services to Prepare an Affordable Housing Linkage Fee Nexus and Feasibility Study**”

Fiscal Coordinator
Town of Eatonville CRA
370 E. Kennedy Blvd
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For a complete list of the CRA’s RFP submittal terms and conditions, legal statements, and insurance requirements, please refer to the exhibits attached hereto.



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Exhibit A

SCOPE OF SERVICES

The Town of Eatonville CRA intends to obtain the services of a qualified firm to provide the services as outlined below. Best industry practices and/or best management practices may require additional services not explicitly enumerated. The proposer should identify any additional services required, price them, and explain them in their response.

A. Project Scope

The Town of Eatonville CRA intends to obtain the services of a qualified firm to prepare an Affordable Housing Linkage Fee Nexus and Feasibility Study with the CRA District.

B. Project Requirements

Project requirements shall include, but not be limited to:

1. The review all materials included in the Reference section below.
2. Preparation of a nexus study that analyzes the relationship between new commercial development and affordable housing impacts, identifies the types of commercial development projects subject to the fee , determines how the fee is calculated (by business sized, location or other factor), determines when the fee is payable and examines other factors related to exemptions appeals or credits or offsets that may be considered.
3. Preparation of an assessment as to how a proposed Housing Linkage Fee will impact the overall supply of affordable housing in the Town /CRA District.
4. Preparation and implementation of a comprehensive outreach program consisting of two (2) stakeholder and community meetings with residents, business/property owners, one Town of Eatonville CRA meeting and weekly telephone meetings with staff during the contract period.



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Exhibit B

PROPOSAL OUTLINE TO BE SUBMITTED

The proposal shall be organized and submitted with the following elements:

A. Cover Page

B. Table of Contents

C. Executive Summary

Provide a brief summary describing the proposer's ability to perform the work requested, a history of the proposer's background and experience providing services, the qualifications of the proposer's personnel to be assigned to this project, any subcontractor, sub consultants, and/or suppliers and a brief history of their background and experience, and any other information called for by this request for proposal which the proposer deems relevant, including restating any exceptions to this request for proposal. This summary should be brief and concise to apprise the reader of the basic services offered, experience and qualifications of the proposer, staff, subcontractors, and/or suppliers.

D. Questionnaire/Response to Scope of Services

Proposer shall provide responses and information to fully satisfy each item in the Questionnaire. Each question item should be presented before the proposer's response.

E. Attachments

QUESTIONNAIRE

A. Company and General Information

1. Company name and address.
2. Letter of transmittal signed by an individual authorized to bind the respondent, stating that the respondent has read and will comply with all terms and conditions of the RFP.
3. General information about the primary contact who would be able to answer questions about the proposal. Include name, title, telephone number and email address of the individual.

B. Qualifications and Experience of the Firm

1. Describe your firm's history and organizational structure. Include the size of the firm, location of offices, years in business, organizational chart, name(s) of owner(s) and principal parties, and number and position titles of staff.
2. What is the primary business of the parent company and/or affiliates?
3. Which office(s) of your organization will have primary responsibility for managing this account? List the members of your team who will be responsible for providing the services and for ongoing support including



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outreach efforts.

4. What is your firm's experience conducting the services requested? Describe comparable projects performed by your firm in the last five years, including the number of projects, scope of service, and status of projects.
5. Comment on other areas that may make your firm different from your competitors.

C. Qualifications and Experience of Proposed Project Team

1. Describe the qualifications of staff proposed for the assignment, position(s) in the firm, and types and amount of equivalent experience. Be sure to include any municipal agencies they have worked with in the past three years and their level of involvement. A description of how overall supervision will be provided should be included.
2. Identify and provide the resume(s) of the personnel who will be assigned to this project including outreach efforts.

D. Questions/Response to Scope of Services

1. Describe the methods by which your firm will fulfill the services requested in the Scope of Services and subsequent sections.
2. Provide a statement of the service(s) that differentiate your firm from other respondents.

E. Fees

1. Provide your fees for the proposed services. Fee quotes should be detailed by service.
2. Outline billing and payment expectations, including timing and method of payment.
3. Describe any remaining fees not previously detailed in the above.

F. References

List the name, address, e-mail address and telephone number of references from at least three (3) recent similar projects. Include a brief description of the work provided for each reference. Florida municipal or county projects are preferred. You may offer more than three recent similar projects if desired. The references should include the start date of the project and the date of completion for each project.



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G. Implementation Schedule

Include a detailed implementation schedule with an estimated project start date of July 17, 2020 and note key project milestones and timelines for deliverables. Identify any assumptions used in developing the schedule.

H. Certificate(s) of Insurance

The CRA will require the successful Respondent (or Proposer) to provide Certificates of Insurance evidencing required coverage types and the minimum limits. See the attached CRA Draft Standard Agreement for more information on the CRA's insurance requirements.

I. Business Tax Certificate

The proposing organization does not require a Town of Eatonville Business Tax Certificate to respond to this RFP. However, the successful proposer will be required to acquire a Town of Eatonville Business tax certificate during the contracting process and maintain an active certificate throughout the contracted period.

Standard CRA Professional Services Agreement

The CRA will require the successful company to execute a professional service agreement with the CRA. Please review the attached draft agreement and identify any questions, changes, or areas of concern in your proposal to the CRA. Any/all requests for changes to the agreement must be included with the responsive proposal. A company's failure to respond with proposed changes to the draft agreement indicates their concurrence with its terms and conditions.



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Exhibit C

VI. EVALUATION OF PROPOSALS

Proposals will be judged on the Proposer's ability to provide services that meet the requirements set forth in this document. The CRA reserves the right to make such investigations as it deems necessary to determine the ability of the Proposer to provide services meeting a satisfactory level of performance in accordance with the CRA's requirements. Interviews and presentations by one, several, or all of the Proposers may be requested by evaluators if deemed necessary to fully understand and compare the Proposer's capabilities and qualifications. The adequacy, depth, and clarity of the proposal will influence, to a considerable degree, its evaluation. Proposals will be evaluated on the basis of the following criteria, in no particular order:

1. Qualifications & Experience Section IV, B & C
2. Questions/Response to Scope of Services Section IV, D
3. Fees Section IV, E
4. References, Schedule & Required Forms Section IV, F – I

As reflected above, contract award will not be based solely on price, but on a combination of factors as determined to be in the best interest of the CRA. After evaluating the proposals and discussing them further with the finalists or the tentatively selected Advisor, the CRA reserves the right to further negotiate the proposed work and/or method and amount of compensation.

REFERENCES

- 1) Matrix identifying fees other cities charge the cost per employee or other fee unit assessed, number of affordable housing units produced per year
- 2) Housing Program Summary Matrix
- 3) Orange, Seminole, or Osceola County Affordable Housing Rent Limits
- 4) Orange, Seminole, or Osceola County Affordable Housing Income Limits
- 5) Current Planning employment/housing projections
- 6) Town of Eatonville Census Tract Data for Housing



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SUPPLEMENTAL TERMS AND CONDITIONS AND LEGAL STATEMENTS

SUPPLEMENTAL TERMS AND CONDITIONS

I. Submission of a proposal shall be deemed a binding offer to enter into a contract with the CRA. Any proposed modifications to the agreement shall be signed by the successful Proposer and returned, together with the certificate of insurance required pursuant to said Section of the Agreement within ten (10) days after the Notice of Award.

II. All Proposers shall be presumed to understand all of the terms, conditions and requirements of the agreement as stated in the specifications and to be thoroughly familiar with the project.

III. The selected Proposer shall be required to obtain all applicable Town of Eatonville permits and business licenses. The Business Licensing Department may be reached at (407) 623-8904. The cost of these items shall be included in the total proposal price.

IV. Any proposal may be withdrawn prior to the RFP opening time provided that the request is in writing and signed by the authorized representative. The withdrawal of a proposal shall not prejudice the right of the Proposer to file a new proposal to the time and date set for the opening of proposals. No proposal received after the time fixed for the RFP opening will be considered.

V. Subsequent to the RFP opening, a Proposer shall be relieved of a proposal due to mistakes only if the Proposer can establish to the satisfaction of the CRA that all of the following circumstances exist:

- a. A mistake was made.
- b. The Proposer gave the CRA written notice within five (5) days after the opening of the proposals of the mistake; specifying in the notice, in detail, how the mistake occurred.
- c. The mistake made the proposal materially different than the Proposer intended it to be.
- d. The mistake was made filling out the proposal and not due to error in judgment or to carelessness in reviewing the scope of service or specifications as stated in the RFP.

VI. The CRA reserves the right to seek supplemental information from any proposer at any time between the dates of proposal submission and the RFP award. Such information will be limited to clarification or amplification of questions asked in the original proposal. Any proposer may be subject to personal interview and inspection of their business premises prior to award.



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VII. The CRA reserves the right to reject any or all proposals and to waive informalities and minor irregularities in proposals received and to accept any portion of proposal or all items of proposal if deemed in the best interest of the CRA. In addition, the CRA reserves the right to do any, or all, of the following:

- a. Reject any or all proposals or make no award.
- b. Issue subsequent RFP.
- c. Cancel the RFP.
- d. Remedy technical errors in the request for proposals.
- e. Modify any requirements contained within the RFP and request revised submittals from Proposers determined to be within the competitive range.
- f. Award a contract to one or more Proposers.
- g. Accept the written proposal as an offer, without negotiation and issue a notice to proceed, if applicable.

VIII. The CRA reserves the right to contract with any of the organizations responding to this RFP based solely upon its judgment of the qualifications and capabilities of that organization.

IX. All materials submitted regarding this RFP become the property of the CRA. Responses may be reviewed by any person at RFP opening time and thereafter. The CRA has the right to use any or all information presented in reply to this request, subject to the limitations outlined in Proprietary Information below. Disqualification of a proposer does not eliminate this right.

a. Proprietary Information – Any restrictions on the use of data contained within a proposal must be clearly stated in the proposal itself. Proprietary information submitted in response to this RFP will be handled in accordance with applicable Town of Eatonville Procurement Regulations and the Florida Public Records Act.

X. The CRA is not liable for any cost incurred by proposer prior to issuance of an agreement, contract, or purchase order.

LEGAL STATEMENTS

All proposers must meet the following contractual and legal requirements in order to enter into a contractual agreement with the CRA:

I. PROHIBITED INTERESTS

a. Contractor warrants that it has not employed or retained any company or person, other than a bonafide employee working solely for Contractor, to solicit or secure this contract and that it has



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not paid or agreed to pay any company or person, other than a bonafide employee working solely for Contractor, any fee, percentage, brokerage fee, gifts or any other consideration, contingent upon or resulting from the award or making of this contract. For violation of this warranty, the CRA shall have the right to annul this contract without liability.

b. Contractor agrees that, for the term of this Contract no member, officer, or employee of the CRA, or of a local public body during his/her employment for one (1) year thereafter, shall have any interest, direct or indirect, in this contract, or to any benefit arising thereof.

c. The employment by Contractor of personnel on the CRA's payroll will not be permitted in the execution of this contract, even though such employment may be outside of the employee's regular working hours or on Saturdays, holidays, or vacation time; further, the employment by the Contractor of personnel who have been on the CRA's payroll within one (1) year prior to the date of contract award, where such employment is caused by and/or dependent upon Contractor securing this or related contract with the CRA, is also prohibited.

II. ANTI-LOBBYING PROVISION

a. During the period between proposal submission date and the contract award, proposers, including their agents and representatives, shall not directly discuss or promote their proposal with any member of the CRA or Town of Eatonville CRA Board of Directors or CRA staff except in the course of CRA-Sponsored inquiries, briefings, interviews, or presentations, unless requested by the CRA;

b. This provision is not meant to preclude offerors from discussing other matters with CRA Board members or CRA staff. This policy is intended to create a level playing field for all potential offerors, assure that contract decisions are made in public, and to protect the integrity of the RFP / Bid Evaluation process. Violation of this provision may result in rejection of the offeror's proposal.

III. NON-DISCRIMINATION PROVISION:

The Town of Eatonville CRA encourages the participation of Small Business Enterprises (SBEs) and Disadvantaged Business Enterprises (DBEs) in its procurement and contracting activities. The CRA reaffirms its commitment to award its contracts and purchase orders in a non-discriminatory manner regardless of the individual's or entity's ancestry, age, color, physical and/or mental disability, genetic information, gender identity, gender expression, marital status, medical condition, military and/or veteran status, national origin, race, religion, sex/gender, or sexual orientation.



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IV. PROTECTION OF RESIDENT WORKERS:

Protection of Resident Workers: The Town of Eatonville CRA actively supports the Immigration and Nationality Act (INA) which includes provisions addressing employment eligibility, employment verification, and nondiscrimination. Under the INA, employers may hire only persons who may legally work in the United States (i.e., citizens and nationals of the U.S.) and aliens authorized to work in the U.S. The employer must verify the identity and employment eligibility of anyone to be hired, which includes completing the Employment Eligibility Verification Form (I-9). The Contractor shall establish appropriate procedures and controls so no services or products under the Contract Documents will be performed or manufactured by any worker who is not legally eligible to perform such services or employment.