



Anderson Housing Authority

Kimberly G. Townsend, Executive Director
528 W. 11th Street, Anderson, IN 46016
Telephone/TDD (765) 641-2620 Fax (765) 641-2629
Email: ahain@ahain.org

Thomas J. Broderick, Jr., Mayor

Request for Qualifications

RFQ #: 2023-01-AHI

April 17, 2023

Public Housing Relocation Co-Development Partner

I. Cover Page

To: Prospective Co-Development Partners
Issued by: Anderson Housing Authority (Indiana)
Project: Public Housing Relocation
Services: Co-developer and partner for the relocation of public housing properties
Issue Date: May 2023

Pre-proposal Conference Date: May 18, 2023

RFQ Questions Due: May 15, 2023 – 3:00 p.m. EST – *Please email, or call in with questions to the information below:*

Attn: Kevin Sulc, COO
Anderson Housing Authority
(765) 641-2620 ext. 420
ksulc@ahain.org

Proposals Due: June 15, 2023, 3:00 p.m. EST. Late submissions will not be accepted.

Submit Proposals To: Anderson Housing Authority, 528 W. 11th Street, Anderson, IN 46016; Attn: Kevin Sulc

RFQ Contact: Kevin Sulc, ksulc@ahain.org (765) 639-5722

Document Availability: www.ahain.org, or click 'here'



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I. Introduction

A. Notice

The Anderson Housing Authority (AHA) requests statements of qualifications from affordable housing development firms (“Co-Developer”) to provide co-development services, partnership, and consulting services related to repositioning public housing.



Proposals must be received by June 15, 2023, 3:00 p.m. EST. Proposals may be submitted via link in email to Kevin Sulc, ksulc@ahain.org, or mailed to Anderson Housing Authority, 528 W. 11th Street, Anderson IN 46016. Proposals received after the deadline will not be considered.

The RFQ document is posted to the AHA website at (www.ahain.org). Proposal documents can be viewed and downloaded from that site. Proposals may check the site for any addendums before submitting their proposal.

AHA reserves the right to request any and all proposals and waive any and all formalities in the best interest of the authority.

B. Anderson Housing Authority

The Anderson Housing Authority was established in 1975 in accordance with the US Housing Act of 1937 and Indiana State Laws. The mission of AHA is to promote, without discrimination, affordable quality housing, economic opportunity, and a positive living environment for the residents we serve. We are committed to providing housing opportunities of all types to low and moderate income families. We administer 117 units of traditional subsidized rental (Public Housing) units as well as 60 Affordable and Tax Credit units throughout the community. We also administer approximately 1,306 HCV (Section 8) and 70 Mainstream vouchers in Anderson, IN and surrounding communities of Madison County. The Anderson Housing Authority offers housing alternatives without regard to race, color, religion, sex, handicap, familial status, or national origin. We invite you to consider the Anderson Housing Authority when making your housing choice. Our goals are as follows:

- To increase and preserve the supply of affordable quality housing.
- To maintain high levels of customer satisfaction.
- To widely communicate the services and achievements of the Housing Authority.
- To maintain balanced budgets including provisions for appropriate reserves.
- To attract and retain the highest caliber employees dedicated to carrying out the Housing Authority mission.

Anderson Housing Inc. is a 501(c)3 Not-for Profit agency managed by the Anderson Housing Authority. AHI has a 9-member board of directors, including 2 residents and/or development area community members. AHI manages 49 LIHTC properties called “Westwood Estates” and 11 single-family affordable housing units. In addition, AHI manages an 8-unit apartment building called “Abbott Apartments” which is owned by Pathstone Corporation located at 8th and College and Parkview Place Apartments located at the YMCA and owned by Episcopal Retirement Services.

As managing agent, AHI offers a barrage of amenities that makes us one of the highest rated agents in Madison County. We offer a full staff of housing managers, section 8 specialists, maintenance, finance specialists including an accounting firm, housekeeping and a full-time housing counselor. The managing agent possesses years of experience in both affordable, tax credit and low-income public housing properties. We believe our model of excellence, tenant accountability, rent collections, bill payments and property upkeep will more than satisfy any property owner that wishes to maintain safe, decent and suitable housing. Our model also allows for a great partnership and profitability.

C. Portfolio Repositioning: Overview and Goals

AHA has set out to reposition its public housing. Many housing authorities, like AHA, are focusing on creating self-sustaining developments through public-private partnerships, thereby ensuring residents have a well-managed and well-maintained place to live. AHA is looking to transform itself from an agency that administers HUD programs to a real estate development company while continuing its mission to serve low-income families throughout the City of Anderson, Indiana.

In September 2022, AHA had undertaken an analysis of its affordable housing portfolio in partnership with Dominion Due Diligence Group (D3G). That review identified options, opportunities, and strategies for repositioning all public housing units, both multifamily and scattered sites. The review also indicated financial capacity to address current and projected capital needs and repairs while also strengthening AHA’s overall long-term financial position.



AHA is seeking proposals from qualified, experienced developers to provide full-service portfolio restructuring and oversee renovations and possible new construction. The selected firm will be a direct advisor to AHA and is expected to work in partnership with AHA staff, other development partners if applicable, HUD representatives, AHA's Counsel, Bond Counsel, lenders, investors, residents and other relevant community partners.

AHA's current public housing portfolio consists of 120 units across 36 scattered single-family home sites and two main complexes: Lynnwood Village and Westvale Manor. Detailed information about these properties is outlined in charts below. The September 2022 D3G analysis of physical, financial, and operations related to AHA's portfolio informed recommendations that now serve as the basis for selecting a co-development partner.

The D3G Repositioning Analysis calls for AHA to reposition the entire public housing portfolio. Implementation of this strategy would rely on a Section 18 Disposition application for some or all scattered site single family homes as well as a RAD/Section 18 Small Agency Blend strategy for Lynnwood Village and Westvale Manor. AHA has experience with the Section 18 Disposition application process, but would like to wait until a potential Co-Development partner further evaluates the repositioning strategy to proceed.

AHA leadership developed the following guidelines to be used to inform its repositioning implementation decisions:

1. Continue to primarily serve low-income households in these communities
2. Improve the physical and financial conditions of the properties
3. Increase the supply of affordable housing on current sites as feasible and local market conditions demand
4. Maintain ownership and control of the properties as feasible
5. Serve as the property management and LIHTC compliance entity for the properties
6. Leverage capacity gained through repositioning to create new affordable housing opportunities in the City of Anderson

In addition to managing properties owned by Anderson Housing Authority and the component unit Anderson Housing Inc., AHA manages Abbott Apartments owned by Pathstone Corporation and Parkview Place owned by Episcopal Retirement Services.



Westvale Manor– AMP 1

PROPERTY DESCRIPTION

Portfolio Review:	Anderson Housing Authority
Property:	Westvale Manor
AMP:	1
Address:	2215 Fulton Street, Anderson, IN 46016
Type/Demographic:	Family
Opportunity Zone:	Yes
Qualified Census Tract:	Yes
PIC Development:	IN006000001
Description:	60 1-BR & 2-BR units - 12 1BR (650 SF) - 48 2BR (800 SF) Built 1969 and reconstructed in 1981

Lynnwood Village– AMP 1

PROPERTY DESCRIPTION

Portfolio Review:	Anderson Housing Authority
Property:	Lynnwood Village – 24 townhomes
AMP:	1
Address:	1903 Miller Ave Anderson, IN 46016
Type/Demographic:	Family
Opportunity Zone:	Yes
Qualified Census Tract:	No
PIC Development:	IN006000001
Description:	- 24 units - All 3 BR/1.5 BA - 1100 SF - Built 1988

Scattered Sites – AMP 1

PROPERTY DESCRIPTION



Portfolio Review:	Anderson Housing Authority
Property:	Scattered Sites - 33
AMP:	1
Address:	Various
Type/Demographic:	Family
Opportunity Zone:	Six (6) properties located in OZs: <ul style="list-style-type: none"> - 2911 Greenbriar Rd - 2745 W 12th St - 2619 W 18th St - 2016 Beverly Ct - 2020 Drexel - 2112 Costello Dr
Qualified Census Tract:	Eight (8) properties located in QCTs: <ul style="list-style-type: none"> - 1912 W 10th St - 928 Arrow Ave - 526 W 11th St - 1520 Sherman St - 719 W 17th St - 822 W 17th St - 530 W 16th St - 1710 Sherman St
PIC Development:	IN006000001



Description:	<p>Mix of 3-bedroom and 4-bedroom single family homes located at various addresses:</p> <ul style="list-style-type: none"> - 603 Andover Road - 928 Arrow Ave - 2016 Beverly Court - 1301 Bramble Way - 2424 Briar Road - 2112 Costello Drive - 815 Delmar Road - 2020 Drexel Drive - 1727 Greenwood Drive - 1728 Greenwood Drive - 1808 Greenwood Drive - 3507 Main Street - 1712 Raintree Drive - 1520 Sherman Street - 932 Lindberg - 1705 Woodbine Drive - 1912 W 10th Street - 2619 W 18th Street - 521 W 37th Street - 2826 Betula Drive - 1611 Catherine Drive - 4424 Columbus Ave - 2911 Greenbriar Road - 4009 Lee Street - 5122 Pearl Street - 2407 Tamarack Road - 2316 Wildwood - 2745 W 12th Street - 530 W 16th Street - 1616 E 47th Street - 1710 Sherman Street - 719 W 17th Street - 822 W 17th Street - 2024 Drexel Drive – vacant lot - 2316 Claremont Ave - vacant lot - 526 W 11th Street – vacant lot
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D. AUTHORITY'S RESERVATION OF RIGHTS

1. The AHA reserves the right to reject any and all proposals, to waive any informalities in the RFQ process, or to terminate the RFQ process at any time if deemed by the AHA to be in its best interest.
2. The AHA reserves the right to not award a contract pursuant to this RFQ.
3. The AHA 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 proposer.
4. The AHA reserves the right to determine the work schedule and locations that the successful proposer shall provide the services described in the RFQ.
5. The AHA reserves the right to retain all proposals submitted and not permit withdrawal for a period of sixty (60) days subsequent to the deadline for receiving proposals without the written consent of the AHA.
6. The AHA reserves the right to negotiate the fees proposed by the proposer entity as described in the RFQ.
7. The AHA reserves the right to reject and not consider any proposal that does not meet the requirements of this RFQ, including but not necessarily limited to, incomplete proposals and/or proposals offering alternate or non-requested services.



8. The AHA shall have no obligation to compensate any proposer for any costs incurred in responding to this RFQ.
9. The AHA shall reserve the right to, at any time during the RFQ or contract process, prohibit any further participation by a proposer or reject any proposal submitted that does not conform to any of the required details herein.

III. Co-Developer Roles

The Co-Developer to be selected must have experience with developing housing with the Low-Income Housing Tax Credits (LIHTCs) and repositioning public housing using HUD's Section 18 Disposition and RAD/Section 18 Blend process. The Co-Developer will join AHA in the co-development and sharing a stake in the ownership entity, as necessary, to carry out the plans for redevelopment of AHA properties. The selected co-developer will be encouraged to offer creative development and financing options. AHA prefers a Co-Developer willing to be a turn-key developer, meaning they are not in the long-term ownership structure, but may be in the ownership to cover certain tax credit guarantees.

It is anticipated that AHA and the Co-Developer will enter into a Master Development Agreement ("MDA") defining the respective roles and responsibilities, fee structure and provision of guarantees. AHA anticipates using the same Co-Developer for repositioning its entire portfolio over a three to four year timespan from RAD application to completing rehabilitations.

AHA anticipates the scope of services may include, but is not limited to, the following:

- 1. Staffing & Capacity:** Provide the necessary staffing, expertise, supervision, and organizational capacity required to implement all aspects of AHA's portfolio redevelopment.
- 2. Development Team & Consultants:** Provide all consultants and contractors necessary to implement the redevelopment. These should, at a minimum, include full service architectural and engineering teams, general contractor, survey, market study, appraisal and environmental consultants and contractors.
- 3. Capacity Building:** Support capacity-building opportunities for AHA staff and Board during the predevelopment and construction, conversion to permanent financing, and management of the redevelopment.
- 4. Communication:** Establish regular team meetings with AHA and members of the wider consulting team as needed, submit periodic progress reports on project status, budget and schedule.
- 5. Scheduling Management:** Create and maintain a project schedule that includes critical tasks from predevelopment through permanent loan conversion. Specific schedules focused on discrete tasks, such as LIHTC applications, design process, HUD approvals and relocation will also be necessary.
- 6. Pre-Development:** Coordinate pre-development activities including environmental and geotechnical testing, architectural and engineering work, analysis of the condition of existing utilities at the site, site analysis, rezoning (if necessary), market analysis, land acquisition opportunities and financial feasibility.
- 7. Resident Engagement:** Maintaining a positive relationship with the residents is of great importance to AHA. AHA will maintain the primary relationship with residents; however, the Co-Developer is expected to foster a positive working relationship with residents to successfully implement the repositioning plans.
- 8. Design Development:** Lead the effort to create a design plan for each site which reflects general development goals, modernization, physical needs and financial feasibility. AHA and Co-Developer will jointly participate in design meetings. Co-Developer and AHA will review and approve any final site designs plan, unit mix, unit/building designs and building material selections.

Developers must identify with their submittal the design team responsible for planning and architecture of all buildings. Identification of other team members is not required at this time. AHA reserves the right to approve development team members.



9. Land Use, Permits and Regulatory Approvals: Seek and obtain all necessary approvals related to land use and entitlements, public works and building permits where applicable.

10. Finance & Guarantees: Prepare and update a financial plan for development(s) that includes pre-development expenses, reasonable rehab cost estimates, architectural design services, relocation and all other necessary soft costs. Sources of funds are anticipated LIHTC, permanent debt, other federal, state, local or private funding as is available. Co-Developer is responsible for understanding current market conditions reflecting pricing and terms of financing, techniques to optimally structure financing, identifying newly created or otherwise available development subsidy and creating and implementing a viable financial plan.

Solicit and negotiate pricing and terms with lenders and investors for any construction loans, permanent loans, equity investments, or other sources of funding. AHA and the Co-Developer will review and approve any investment terms. Co-Developer is responsible for securing the necessary commitments, providing partial guarantees, and closing financing.

11. Construction: Responsible for the successful completion of construction projects. This includes all pre-construction management work with the general contractor, negotiating a construction contract with guaranteed maximum price, responsible for all change management during construction, responsible for delivering the approved project on schedule and on budget.

12. Relocation: Responsible for recommending and procuring a relocation consultant that will create a relocation plan, educate residents, train AHA staff, assist with relocation budgeting, and develop a resident relocation phasing plan used during renovations.

IV. AHA Roles

1. Staffing & Capacity: Assign lead contact(s) to the Co-Developer to allow for clear engagement. AHA will be responsive to requests and make decisions timely in support of the project schedule.

2. Capacity Building: Engage in the development process with a focus on building organizational skills and capacity necessary to understand decisions about the subject properties and to successfully complete future LIHTC-focused developments.

3. Development Team: Approve the following key members of the development team: architect, consultants, general contractor and partnership legal counsel among others.

4. Communication: Participate in project meetings throughout the development process. Provide timely responses and convey important information relevant to a successful repositioning. Take lead on communication with resident council, Board of Commissioners, local government and other local stakeholders.

5. Resident Engagement: AHA will be the primary point of contact and lead resident engagements.

6. Relocation: AHA will work with a relocation team or consultant to provide necessary tenant information or communications. AHA can lead relocation efforts after plans and policies are established by consultant.

7. Design Development: In conjunction with the selected firm, develop a comprehensive master plan for the communities including site layout, unit mix and configuration, amenities, and other physical and environmental design aspects. AHA requests final approval over designs and materials specified. Oversee design, construction and quality control of the development. Comply with Section 504 of the Rehabilitation Act, as amended, and the rules and regulations there under, with regard to provision of accessible housing.

8. Land: Provide the land for the development.

9. Finance & Guarantees: Provide \$100,000 for pre-development expenses. Provide seller financing in an amount and terms to be determined as part of the financing plan development. Subject to change, considering providing some



guarantees limited to lease up and stabilization. Establish a financial structure that allows AHA to participate in a stream of income from the development, including the developer's fee cash flow and incentive management fees.

10. HUD Approvals: Submit Section 18 Disposition applications as needed for scattered sites and/or flood zone section of Lynnwood Village. Cooperate with Co-Developer or selected RAD Consultant to facilitate RAD application through CHAP issuance, concept call, financing plan submittal, RCC issuance, closing and all other follow-through with HUD Recap and Field Office. Coordinate with Local HUD Field Office.

11. Ownership: AHA and its nonprofit affiliate to participate in the ownership entity in a form acceptable to investors and Co-Developer. It is AHA's goal to partner with turn-key developer and maintain management responsibilities as a managing general partner in the ownership entity, including holding the Right of First Refusal and Option to purchase the properties at the end of the LIHTC compliance period.

12. Operations and Property Management: Continue to provide property management and maintenance services to the existing property/residents through conversion from public housing to full repositioning and LIHTC compliance.

13. PBVs: AHA is able to provide PBVs from its regular voucher authority as needed for units added above the Public Housing ACC amount. AHA will administer any RAD PBVs or TPVs associated with repositioning.

V. Submission Requirements

It is each proposer's responsibility to be aware of and to abide by all dates, times, conditions, requirements, and specifications set forth within all applicable documents issued by AHA, including the RFQ, Attachments, and any addenda. By virtue of completing, signing, and submitting the completed documents, the proposer is stating his/her agreement to comply with all the conditions and requirements set forth within those documents.

To provide all responding firms equal consideration and opportunity to be evaluated fairly, submissions must be formatted as described below. The sections that must be included in the written submission are below and must be clearly labeled and assembled in the order provided below. Responses that do not include all required information may be deemed unresponsive. Concise and clear submissions are encouraged. If necessary, AHA may seek clarification after submission.

Respondents must submit one (1) electronic version to the AHA by June 15, 2023 at 3:00 PM EST. This could be in a thumb drive or dropbox that will be provided upon request.

TAB 1: Cover Letter

Respondent's submittals shall be accompanied by a Cover Letter on the respondent's letterhead. The letter should state proposer understands the scope of services, the commitment to perform the services expeditiously, and a brief statement indicating why the respondent believes they are best qualified to perform the engagement. Briefly describe all members of the development team being proposed. Letter should be signed by authorized representative of the Co-Developers entity or partnership.

TAB 2: Organizational Description(s) and Key Personnel

A general description of the respondent including the nature of the business or organization, a brief summary of its history and its size. Describe the philosophy, approach and preferred methods for meeting requirements requested in the scope of services. Describe how the respondent intends to meet the AHA request to have a "teaching spirit" which guides, coaches and develops capacity of key AHA staff through the revitalization, financing and compliance phases.

Names and resumes of key personnel who will constitute the development team under this request. This shall include, but not be limited to: an organizational chart providing the identity of interest corporations that may participate in this project; Directors and Officers of each identified corporation; disclosure of any overlapping ownership or directorship interests and/or of any conflicts; subcontractors or other affiliated participants with a description of their relationship; a



narrative statement describing previous collaboration and/or interaction of team members; and, the address of the principal office and branch offices, if any.

Note the AHA desires to participate in the selection of some team members, therefore responses are not required to include all fields and disciplines or functions such as environmental technicians, engineers and construction contractors.

Certify that all key staff will be available to start immediately or describe existing time commitments which would impair the respondent's ability to proceed expeditiously.

TAB 3: Proposed Services

Include in this section documentation further explaining the proposer's services and showing how the proposer's team intends to fulfill the requirements in the Co-Developer Roles section. Detail division of work as necessary among team members.

TAB 4: Current Project Descriptions

A description of all projects that are currently under contract or are anticipated to be under contract during the next 12 months including estimated time, scope, number of units, type and timing of funding applications and anticipated overall cost.

TAB 5: Past Project Descriptions

A description of the scope and nature of RAD or mixed-income residential development experience. Attempt to provide the most recent projects and the most pertinent to AHA's scope combining RAD/Section 18 and 4% LIHTC. Provide a listing of all development projects over the past five years with the following information: name and location of development; general project description; team members directly involved, including corporate and individual; number of residential units; total project development costs; total project construction costs; type of housing; financing methods and funding sources; commencement and completion dates; name and complete contact information of client/owner; and, any ongoing professional relationship that continues to exist with the development. If you have participated in a co-developer relationship with a Public Housing Authority, please provide an overview on that arrangement.

TAB 6: Financing Knowledge

A description of the applicant's knowledge of, and experience with, real estate financing methods, including the use of funding tools such as low-income housing tax credits, FHA insured mortgages, CDFI funding sources, HOME funds, CDBG funds, development funds, and private mortgages. Describe any experience with Indiana LIHTC financing and QAP. Speak to any creative financing plans that do not rely heavily on PHA funding contributions.

TAB 7: References

Provide 5 former or current client references, including PHAs, for who the proposer has performed services similar to those sought by AHA. Please include: the entity's name with the specific contact person's name, email address and telephone number.

TAB 8: MBE/WBE Plan

Minority and Women Business Participation: Proposals submitted in response to this solicitation must include an MBE/WBE participation plan which, at a minimum demonstrates "best efforts" have been taken to achieve compliance with MBE/WBE goals. The response should include a discussion of the approach and methods your team will use to assure efforts to include participation by local businesses, including minority-owned and women-owned businesses. To the extent that such businesses are included in the team or committed to part of the development, they should be identified.

TAB 9: Section 3 Plan

Provide detailed narrative on how the Respondent will assist the AHA to comply with HUD's Section 3 requirements for hiring Section 3 residents and/or local disadvantaged individuals and businesses. Speak to any recent success stories or creative strategies pursued.



TAB 10: Business Terms and Fees

The respondent must include its proposed business terms for the development partnership, including:

1. Propose a specific role AHA and its non-profit affiliate will have in the ownership entity.
2. Propose terms for covering pre-development expenses knowing that AHA can contribute \$100,000 in capital funds toward pre-development.
3. Co-Developer's proposed development fee split and timing for payment of those development fees
4. Propose how guarantees could be provided. Further details of the guarantees will be negotiated and included in the Master Development Agreement.
5. Add other business terms or create ideas Co-Developer proposes to make partnership and repositioning successful.

TAB 11: HUD Forms

All forms attached and/or required to be attached to the RFQ as throughout this request, including but not limited to: HUD Form 5369 B, HUD Form 5369 C, HUD Form 5370 C, Certificate as to Principal, Non-Collusion Affidavit, E-Verify Immigration Affidavit, EEO-AA Plan Statement of Policy, Affirmative Action Program Implementing Section 3, MBE Clause Certification and Firearms Weapons Free Workplace Certification.

TAB 12: Statement of Non-Debarment

Respondents must attest that the responding entity and each of its principals are not, nor have ever been: 1) suspended or debarred from contracting with any federal, state, municipal or quasi-municipal agency or 2) convicted of any crime chargeable as a felony.

TAB 13: Litigation

A description of any current, pending or threatened litigation involving the applicant related to any development project or other related business activity. The applicant must attest to having no litigation pending or contemplated with or against AHA or any related entity.

TAB 14: Audit Report

The most recent audited annual corporate financial statements and unaudited year to date financial statements for the most recent month end for all entities comprising the development team. The statement shall show assets, liabilities, and net worth of the entity.

VI. EVALUATION CRITEREA

Respondents' submittals will be evaluated based on the criteria listed in this section and further described above. In preparing the submittal to AHA, it is for respondents to clearly demonstrate their expertise and qualifications in the areas described in this solicitation.

Respondents are encouraged to identify and clearly label in their submittal how each criterion is being fully addressed. Evaluation of responses to this solicitation will be based only on the information provided in the submittal package, and if applicable, interviews, and reference response. The AHA reserves the right to request additional information or documentation from the firm regarding its submittal documents, personnel, financial viability, or other terms in order to complete the selection process. If a responding firm chooses to provide additional materials in their submittal beyond those requested, those materials should be identified as such and included in a separate section of the submittal.

The following factors will be used by the AHA to evaluate each submission received. Award of points for each listed factor will be solely based upon the submitted documentation:



Factor 1—Experience and Qualifications— 25 points

- Years of experience and demonstrated knowledge in performing all aspects of a RAD conversion for either a rehabilitation or redevelopment project of public housing, specifically experience with RAD/Section 18 Blend deals and securing tax credits in the State of Indiana.
- Years of experience working collaboratively with residents and other community stakeholders as determined through references.
- Philosophy, approach and preferred methods of project management align with AHA goals/values.
- The degree to which the respondent demonstrates successful experience working with PHAs or similar entities in an affordable housing development of similar size.
- Past performance in quality of work, cost control and compliance with performance schedules and regulatory requirements

Factor 2—Development Capacity—20 points

- Proposal completeness and responsiveness to all requirements and priorities of the AHA.
- Qualifications, experience, and expertise of each team member assigned to project
- Ability to obtain, structure and implement layered financing for similar projects, including low-income housing tax credits, private and other public financing, particularly with HUD, Local governments and IHCD.
- Financial capacity as evidenced by financials statements and/or the firm’s most recent audit.
- A proven track record of creative and viable financial plans that do not rely heavily on PHA contributions.
- Ability for all key staff to be available to start immediately.

Factor 3—PHA Collaboration— 20 points

- Respondent clearly articulates its willingness, agreement and demonstrates past experience in collaboratively working with PHAs and non-profits in the planning and implementation of development programs.
- The degree to which the respondent demonstrates a “teaching spirit” to develop capacity with the AHA staff in all stages of the project from implementation to ensuring successful operations post-completion.
- The degree to which the respondent demonstrates coherent and creative approaches to solving issues.
- Respondent articulates its willingness and agreement to promote business opportunity to disadvantaged businesses and demonstrates past experience in working with M/WBE organizations.
- Respondent articulates Section 3 plan efforts that are compliant, creative and show past success in meeting Section 3 targets.

Factor 4— Business Terms— 20 points

- The extent to which the business terms recognize the goals and objectives of the AHA including reasonable sharing of roles and fees with the AHA.
- The degree to which respondent’s business terms response is clear, responsive and innovative and meets the needs of the AHA.

Factor 5—Quality of References —15 points

- The extent to which the references state the ability and capacity of the responding firm to collaborate with the PHA, community stakeholders and residents to be successful in a development or revitalization efforts.

VII. SELECTION PROCESS

Respondents must submit **one (1) electronic version (on flash drive or via file share platform such as Dropbox)** to the AHA **June 15, 2023, at 3:00 PM EST.**

Each proposal received will first be evaluated for responsiveness to the submission requirements.

AHA anticipates that will be convene a selection committee with up to 5 people to evaluate each of the responsive submittals. The selection committee will evaluate and award points based on the factors and points above. Upon final completion of the evaluation process, a competitive range will be established. Proposers in the complete range will be invited to an interview with the selection committee. The purpose of the interview is to seek additional information to aid in the selection process.



Following the evaluation, interviews and reference checks, the selection committee will recommend a top-ranked proposer. At the conclusion of the solicitation process, the selected respondent will be invited to enter into a period of exclusive negotiations with the goal of arriving at a mutually acceptable agreement. If the evaluation was performed to the satisfaction of the AHA Executive Director, the recommendation may be forwarded to the AHA Board of Commissioners for approval.

The AHA reserves the right to make its final selection based solely upon those initial steps. If the AHA determines that another step is necessary to narrow the field of qualified respondents, a select number of respondents will be notified, and additional information may be requested and/or second interviews may be held to determine the final selection.

The AHA reserves the right to conduct reference checks at any point in the review and evaluation process. In the event that information obtained from the reference checks reveals concerns about the proposer's past performance and their ability to successfully perform the contract to be executed based on this solicitation, the AHA may, at its sole discretion, determine that the respondent is not a responsible Co-developer and may select the next highest-ranked respondent whose reference checks validate the ability of the respondent to successfully perform the contract to be executed based on this solicitation. In conducting reference checks, the AHA may include itself as a reference if the respondent has performed work for the AHA, even if the respondent did not identify AHA as a reference.

By submitting in response to this solicitation, the respondent accepts the procurement method used and acknowledges and accepts that the evaluation process will require subjective judgements by the AHA and the evaluation panel.

VIII. Statements and Required Information

IX. Attachments

X. Exhibits

