



## District of Columbia Housing Authority

1133 North Capitol Street, NE Washington, DC 20002-7599

202-535-1000

Tyrone Garrett, Executive Director

### Addendum

Addendum No. 1

Issued: December 8, 2017

#### Development Project Management and Financial Consulting Services 0001-2018

Prospective Respondents are informed that the above named solicitation is modified to clearly define two (2) areas of service Development Project Management and Finance Consulting Services for the subject solicitation.

The District of Columbia Housing Authority (DCHA) hereby **REVISES** the subject solicitation as detailed in Attachment A.

**ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED**  
End of Addendum No. 1

Cheryl Moore  
Contracting Officer

Acknowledgement of Receipt:

Respondent: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

## ATTACHMENT A

### Addendum No. 1

## Development Project Management and Financial Consulting Services 0001-2018

### SECTION A – GENERAL INTRODUCTION

#### A.2 BACKGROUND, Page 1 **DELETE** Paragraphs 3 and 4; **REPLACE** with:

To assist DCHA in its mission, the Authority is seeking qualified consulting organizations to provide (1) Real Estate Development Financial Consulting Service firms and (2) Development Project Management Consulting Services described further in the Scope of Work. DCHA envisions that multiple organizations will be selected for each of the two service areas mentioned above.

### SECTION B – SCOPE OF SERVICES

#### SCOPE OF SERVICES, Page 2-4, **DELETE** and **REPLACE** with:

Development Project Management and Finance Consulting services are required to assist DCHA through predevelopment, construction, and close-out stages for multiple development projects within the DCHA pipeline at various stages of delivery. These assets are composed of mixed-use (affordable residential, market rate residential, retail, office, etc.), mixed-income, urban assets ranging in size from 150 residential units to 2,000 residential units.

The Scope of Services provides descriptions of two very unique skill sets and separate capabilities. Successful Respondents will be responsible for either of the following areas or both:

1. Development Project Management: The day-to-day management activities of those DCHA development projects assigned.
2. Finance Consulting Services: Providing guidance on all aspects of financing those DCHA development projects assigned.

**Respondents may reply to one or both of the above services based upon areas of expertise. Respondents should limit their offers to only the service areas in which they can show in-depth experience and capabilities. Respondents should only respond to both areas if they, in the course of daily business routinely seek out business opportunities in these areas and that providing each of these services is within their “core capabilities” or they have teamed with the appropriate experts.**

#### B.1 Development Project Management

Development Project Managers are responsible for the day-to-day management of projects, which provide housing in mixed use and mixed income developments, through new construction and substantial rehabilitation to preserve and expand the affordable housing inventory in the District of Columbia. Important qualities required to provide Development Project Management include analytical, decision-making, initiative, managerial, public

speaking, knowledge of affordable housing programs, time-management, and writing skills. The Development Project Manager has a central role in planning, implementation, and oversight of assigned development projects.

The following list of functions provides for the nature of the **Development Project Management** portion of the scope of services required; however, this list is not all-inclusive:

- a. Assist in redevelopment efforts including planning, market analysis, preparing funding requests, negotiations with potential development partners, lenders; and funders;
- b. Coordinate and/or participate in community planning sessions, public meetings, presentations and serve as liaison between residents, stakeholders, and human capital providers;
- c. Provide advice on financing, approach, entitlement process, etc. for development and redevelopment projects;
- d. Prepare and/or review funding applications and mixed-finance proposals for public housing, low-income housing tax credits (both 9% and 4%), CDBG, CIP, HOME, or DC Housing Production Trust Funds and other subsidy programs;
- e. Coordinate and manage day-to-day development activities from acquisition/predevelopment to stabilized occupancy;
- f. Develop the scope of services and evaluation criteria to assist with the procurement of other professional services that may be required for development and redevelopment projects;
- g. Provide oversight of grants/loans from award to close out, management of project budgets, funding accounts and program income;
- h. Conduct and participate in meetings with staff, government officials, community stakeholders and residents, developers, financiers, etc.;
- i. Prepare and submit, in cooperation with Development Partners and advisors, loan applications to various private and public funding agencies related to affordable and market rate housing and community development projects;
- j. Coordinate the development of analytical and transactional tasks to include market research, project budgets, sources and uses, draw schedules, pro forma and project schedules;
- k. Represent DCHA's development expertise at various meetings and garner support and trust of stakeholders;
- l. Coordinate loan closing with private developers (when necessary) public agencies, attorneys, lenders, investors, and escrow and title companies;
- m. Coordinate the preparation and review of all necessary and required real estate documents such as financial transaction documents, easements, title, funding draws, , development agreements, operation agreements and various agreements with/for consultants and or contractor services;
- n. Provide conceptual advice in the area of construction costs and methods; and evaluate feasibility of alternative redevelopment strategies;
- o. Review the work of development partners and provide recommendations to OCP Deputy Directors and Director;
- p. Coordinate, schedule, and provide general direction to on-site project contractors, construction managers and subcontractors;
- q. Obtain required authorizations, entitlements and permits from HUD, Office of Zoning, the Department of Consumer and Regulatory Affairs ("DCRA"), State Office of Historical Preservation, District Department of Transportation, local utility companies and other governmental authorities as required;

- r. Meet with top management officials to present findings and/or recommendations; explain the significance of conclusions, justify recommendations and answer questions on all aspects of the development project;
- s. Analyze and resolve complex problems; and
- t. Prepare correspondence, technical, and status reports related to assigned projects.

**B.2 Real Estate Development Finance Consultants Scope of Services:** Real Estate Development Finance Consultants are responsible for providing DCHA with expertise and advice related to real estate transactions for projects within the development portfolio and initiatives to address capital improvements to preserve its public housing portfolio. Key areas of expertise required to provide services include: expertise in residential real estate development (mixed-use experience is also highly desired), expertise in the development and operation of affordable and public housing, and expertise in local and federal affordable housing programs with an emphasis on U.S. Department of Housing and Urban Development (“HUD”) affordable housing programs, expertise in accounting and/or financial management services.

The following list of functions provides for the nature of the **Real Estate Development Finance Consultants** portion of the scope of services required; however, this list is not all-inclusive:

- a. Provide financial analysis of solicited and unsolicited projects, as requested;
- b. Provide assistance and advice to leverage DCHA resources and protect DCHA’s interest;
- c. Review and interpret market analysis, studies and appraisals;
- d. Assist in negotiations with private developers, lenders and investors;
- e. Provide technical assistance with developing strategies and opportunities to redevelop, develop or preserve affordable housing units;
- f. Assist with the preparation of and analyze financial and other data, including development pro forma, financial statements and construction budgets;
- g. Assist in securing project financing, including mortgages, bonds and other loans and/or grants from both private and public sources; Establish or update the allocation of direct and indirect project costs including labor, benefits and overhead; Assist with negotiations, review and drafting of evidentiary documents and supplemental submissions;
- h. Provide technical assistance and advice with the preparation and review of funding applications, proposals, disposition applications, demolition applications, and waiver applications required by HUD, other federal and local agencies.
- i. Research and provide advice on local programs and HUD funding for the expansion and preservation of affordable housing in the District of Columbia;
- j. Make recommendations for affordable housing development and preservation solutions that include best and promising practices based upon industry standards.”
- k. Provide technical analysis and assistance with conversion, LIHTC compliance and project close-out.

**SECTION C- INSTRUCTIONS, CONDITIONS AND NOTICE TO RESPONDENTS**

**C.7 TECHNICAL PROPOSAL, Page 7, ~~DELETE~~ Item 4) Documentation to substantiate past performance content and **REPLACE** with:**

**4) Documentation to substantiate past performance:**

Provide up to five (5) examples of experience within the past five years that best demonstrate the respondent’s expertise required to perform the scope of work outlined in Section B of this solicitation for each service area being responded to Development Project Management Services and/or Real Estate Development Finance Services. This should include the date of the project, project scope, contract amount, client name, contract period, status active or closed, etc.

All examples should reflect experience working with mixed-use (affordable residential, market rate residential, retail, office, etc.), mixed-income, urban assets ranging in size from 150 residential units to 2,000 residential units. Examples spanning the complete range of asset sizes with an emphasis on larger developments, is encouraged.

**SECTION E - EVALUATION FACTORS FOR AWARD**

**E.3 EVALUATION AND SELECTION CRITERIA; TECHNICAL AND COST EVALUATION FACTORS, Page 29, ~~DELETE~~ Item 1. Experience content and **REPLACE** with:**

No.	Criteria	Maximum Points
1	<p><b>Experience</b> Based upon the maximum of five examples provided for each of the two service areas (<i>Development Project Management Services and/or Real Estate Development Finance Services</i>), breadth and depth of the individual(s)/entity experience on projects of similar scope as described in Section B of this solicitation.</p> <p>The above selection criteria will be based on evidence of the following criteria (10 points per example up to max of five examples and 50 points): (1) Specialized experience and technical competence of the firm (including a joint venture or association) 5 points (2) Knowledge of Development Project Management and and/or Real Estate Development Finance or processes and requirements- 5 points”</p>	50