



DCHA LOS 0007-2019

Opportunity Zone Advisor Services

Pre Proposal Conference
Monday, November 25, 2019

AGENDA

- Welcome
- We are DCHA
- Background Opportunity Zone
- Project Overview
- Solicitation Timeline
- Proposal Content
- Evaluation Criteria
- Section 3
- Proposal Submission
- What's Next

WELCOME

> Introductions

> We are DCHA

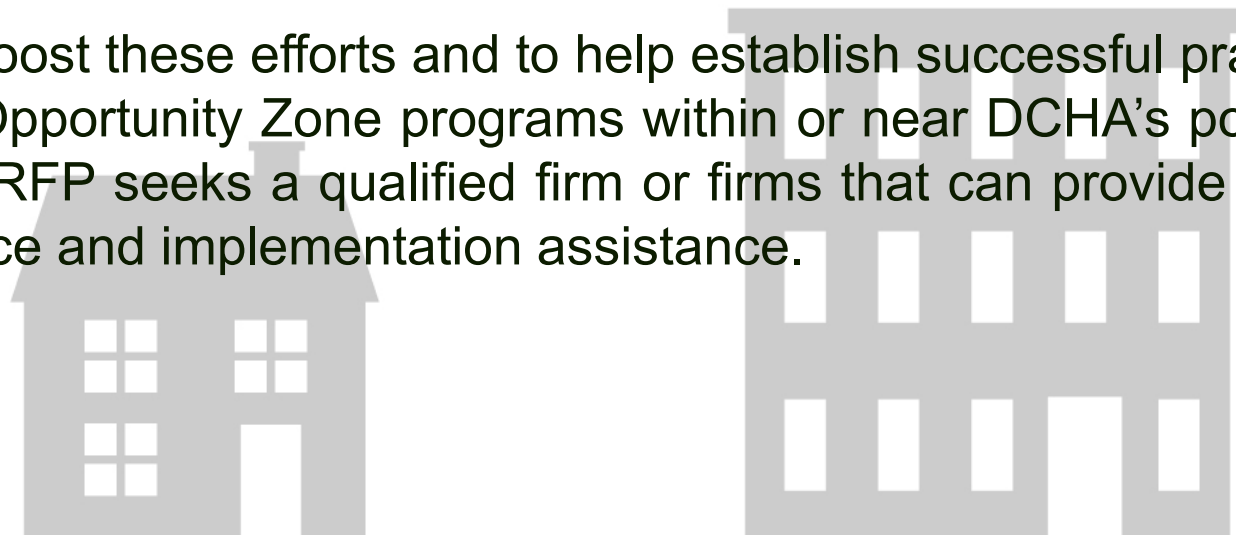
- ❖ District of Columbia Housing Authority is dedicated to enhancing the quality of life in the District of Columbia by providing and effectively managing affordable housing, which is diverse, well maintained, and aesthetically pleasing
- ❖ A housing agency that administers an ambitious program of development and redevelopment to manage approximately 8,700 public housing units and 12,900 housing choice vouchers for low and very low income residents in the District of Columbia.
- ❖ An independent agency of the District of Columbia regulated and funded by the U.S. Department of Housing and Urban Development (HUD)

BACKGROUND

OPPORTUNITY ZONE

The federal Tax Cuts and Jobs Act of 2017 included provisions for Opportunity Zones, which provide a tax advantage incentive for certain investments of private capital gains into designated areas of each state and the District of Columbia. The Authority, in coordination with its 20 year transformation plan, seeks to maximize the economic potential of the new Federal Opportunity Zones program in zones surrounding its portfolio.

To boost these efforts and to help establish successful practices for Opportunity Zone programs within or near DCHA's portfolio, this RFP seeks a qualified firm or firms that can provide expert advice and implementation assistance.



BACKGROUND

OPPORTUNITY ZONE

The selected Proposer ("Advisor") for this project is expected to support and advise the Authority in identifying investment opportunities and potential investors within or near DCHA's portfolio Opportunity Zones as well as strategizing on and formulating new systems and infrastructure that increase the capacity and investment competitiveness of the DCHA Opportunity Zone program, all as further described in the Scope of Work below.



DCHA PROJECT OVERVIEW



Our People, Our Portfolio, Our Plan

District of Columbia Housing Authority

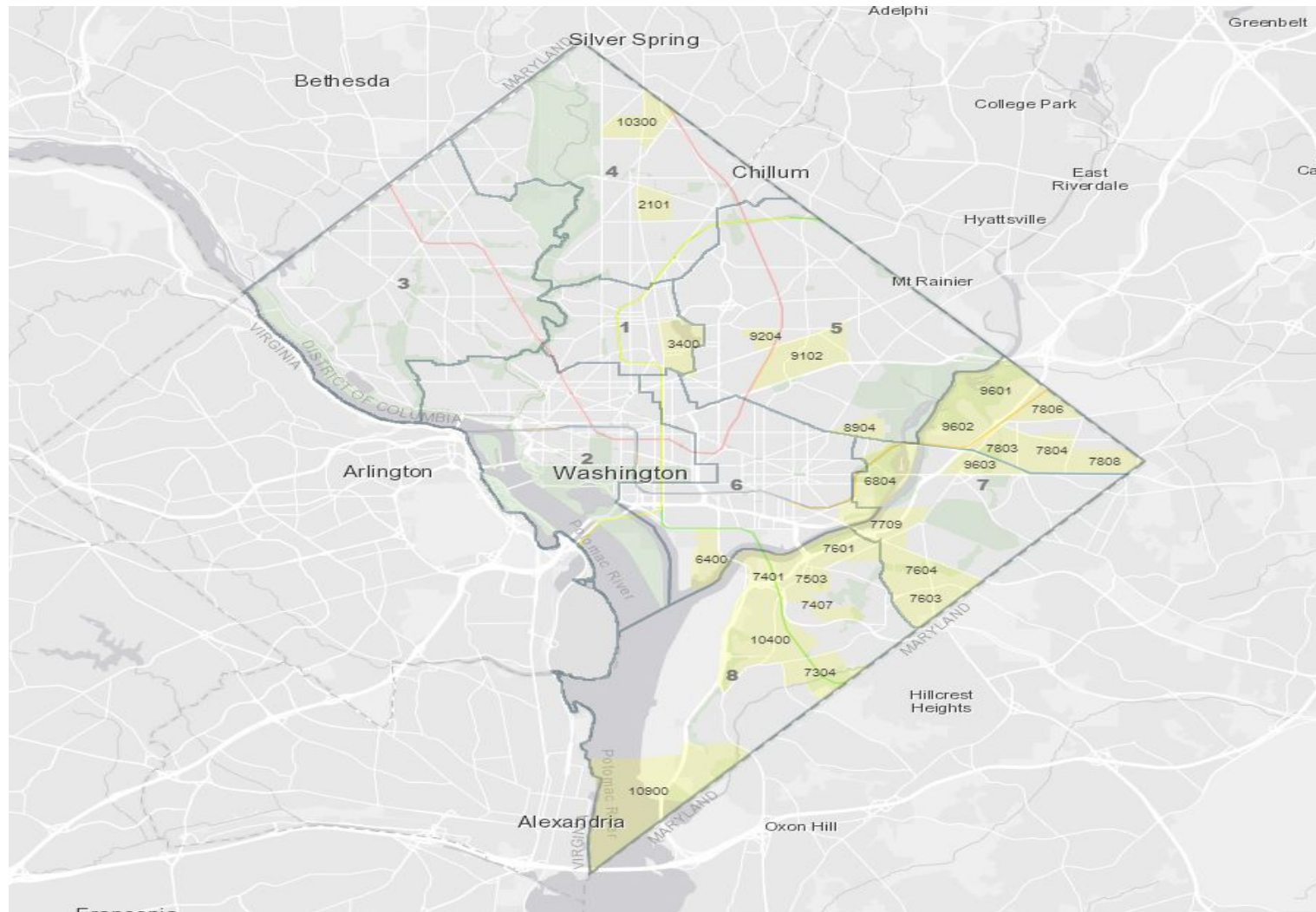
20-Year Transformation Plan

Public Comment Version

08/28/19

DCHA PROJECT OVERVIEW

Opportunity Zone Census Tracts Designated by the District of Columbia



DCHA PROJECT OVERVIEW~

Respondent Qualifications

The selected Offeror shall have

- ❖ Extensive pre-existing knowledge and detailed, technical understanding of the Federal Opportunity Zones program.
- ❖ Extensive and demonstrated financial investment and legal experience with capability of formalizing investment opportunities into financial prospectuses.
- ❖ Extensive and demonstrated experience working with and understanding the needs of private investors, public stakeholders, and government or other public-sector units.
- ❖ The selected Proposer shall have a team of qualified and experienced personnel with dedicated resources toward completing the scope items proposed.
- ❖ The selected Proposer shall have a thorough understanding and ability to identify key locations for redevelopment of residential and commercial real estate

DCHA PROJECT OVERVIEW~

Scope of Work Highlights

The Advisor will provide advisory services regarding Federal Opportunity Zones near DCHA's portfolio of properties and its related efforts.

Advisory services emphasis will be placed upon

- ❖ Strategic planning and formation of systems and infrastructure that will facilitate and encourage the development of Opportunity Funds
- ❖ Other aspects of the Opportunity Zones program near DCHA's portfolio of properties
- ❖ Organizing investment opportunities into formal investment prospectuses complete with financial information on funding requirements, risk assessments, navigation of regulations, etc., that can be targeted toward institutional investors.

DCHA PROJECT OVERVIEW~

Project Tasks

Primary Tasks included within Scope of Services include

- ❖ Identifying and assessing investment opportunities in Federal Opportunity Zones located in near DCHA's portfolio of properties that promote and catalyze economic development.
- ❖ Identifying and developing relationships with potential investors and understanding types of opportunities that would attract investors to Federal Opportunity Zones near DCHA's portfolio of properties.

SOLICITATION TIMELINE

Solicitation Opens	Friday, November 15, 2019
Pre-Proposal Conference	Monday, November 25, 2019
Deadline for Submission of Inquiries/Questions	Wednesday, November 27, 2019
Submission of Proposals	Monday, December 9, 2019
Evaluation Period	December 10-13, 2019
Contract Award	December 30, 2019

PROPOSAL CONTENT

PART I: Technical Proposal

- ❖ Letter of Interest- *Company profile with the attributes of the Offeror*
- ❖ Documentation to Substantiate Firm Capacity and Experience Performing Similar Work- *Five (5) past or current projects similar to the project outlined in the Scope of Services*
- ❖ Past Performance- *Description of three (3) most recent projects completed*
- ❖ Service Approach- *How will you meet the solicitation requirements; How do you determine success*
- ❖ Staffing Plan- *Project Team responsibilities, time on project*

PROPOSAL CONTENT

PART I: Technical Proposal continued

- ❖ Management Approach - *Management strategies and value*
 - ✓ *Subcontractor Plan*
 - ✓ *Service Approach Project phasing and strategy*
 - ✓ *Affirmative Action Plan*
- ❖ List & Documentation of Licenses, Certifications, Affiliations
 - *Entity and Project Team Trade Affiliations, Certifications and Licensure*
- ❖ References- *Reference for each of the projects listed under Experience and Capacity*
- ❖ Certifications & Affidavits- *Attachments A-M Mandatory*

Part II: Price Proposal

1. Price Proposal- Complete Exhibit 1
 - ✓ *Part I- Hourly Rates*
 - ✓ *Key Deliverables & Tasks*

EVALUATION CRITERIA

CRITERIA	MAXIMUM POINTS
Capacity and Experience of the Firm Performing Similar Work (1) <i>Experience with Performing Similar Work- (10) Points</i> (2) <i>Capacity to provide Scope of Work- (10) Points</i> (3) <i>Project Team Members- (5) Points</i>	25
Past Performance (Per Project) (1) <i>Quality of Performance - (3) Points</i> (2) <i>Completed on time and on Budget- (2) Points</i>	15
Service Approach (1) <i>Capacity- Key Project Staff Experience and Education- (10) Points</i> (2) <i>Reasonability- Proposed Staffing Plan appropriate for scale of DCHA Project- (10) Points</i>	20
Staffing Plan (1) <i>Capacity- Key Project Staff Experience and Education- (10) Points</i> (2) <i>Reasonability- Proposed Staffing Plan appropriate for scale of DCHA Project- (10) Points</i>	20
Staffing Plan (1) <i>Capacity- Key Project Staff Experience and Education- (10) Points</i> (2) <i>Reasonability- Proposed Staffing Plan appropriate for scale of DCHA Project- (10) Points</i>	20
Management Approach (1) <i>Management Approach- Proposed Management Approach demonstrates capacity to provide oversight and management of all services required to complete Scope of Services - (5) Points</i> (2) <i>Quality of Phasing and Strategy- (5) Points</i> (3) <i>Affirmative Action Achievements and Plans- (5) Points</i>	15
List & Documentation of Licenses, Certifications, Affiliations (1) <i>Project Team Licensure, Certifications and Trade Affiliations- (5) Points</i> (2) <i>Entity Affiliations- (5) Points</i>	10

EVALUATION CRITERIA

CRITERIA	MAXIMUM POINTS
References <i>(1) Quality of Reference- (1) Point each</i>	5
Section 3 <i>(1) Hiring Section 3 Residents- 6 Points</i> <i>(2) Contracting to Section 3 Business Concerns- 6 Points</i> <i>(3) Other Economic Opportunities- 4 Points</i> <i>(4) Past Performance- 4 Points</i>	20
Price Proposal <i>(1) Hourly Rates- (15) Points</i> <i>(2) Project Deliverables- (15) Points</i>	30
Business Enterprise Designation Points for Small, Minority and Woman-Owned Business <i>Small = 2.5 points</i> <i>Minority = 2.5 points</i> <i>Woman-Owned = 2.5 points</i>	7.5
TOTAL	167.5

SECTION 3

To ensure that employment and other economic opportunities generated by certain HUD financial assistance shall, to the greatest extent feasible, and consistent with existing Federal, State and local laws and regulations, be directed to low- and very low income persons, particularly those who are recipients of government assistance for housing.

- ❖ Mandatory for solicitation
- ❖ Inquiries: Contact Hanna Koerner, Special Advisor DCHA Office of Resident Services
 - ✓ Phone: 202.535.1517
 - ✓ Email: hkoerner@dchousing.org



PROPOSAL SUBMISSION-

What Makes a Good Proposal

REVIEW

- ❖ Scope of Services
- ❖ Evaluation Criteria & Scoring
- ❖ Cost/Price
- ❖ Section 3, CBE, M/WBE
- ❖ Proposal Responses with Evaluation Criteria
- ❖ Acknowledge and include solicitation Addenda

PROVIDE TIME

- ❖ To Prepare, Review and Submit proposal
- ❖ Ask/Submit Solicitation Questions
- ❖ Technical Proposal are Responses to Questions
- ❖ Visit dchousing.org website frequently

WHAT'S NEXT

Email Questions

- ❖ Wednesday, November 27, 2019 no later than 11:00 AM to Kimberly Allen, Procurement Manager at kallen@dchousing.org with copy to business@dchousing.org
- ❖ Visit www.dchousing.org frequently to keep informed of solicitation information
- ❖ Submit ONE (1) original and FOUR (4) copies of proposal by 11:00 AM Monday, December 9, 2019.

Thank You for Attending