

## **NOTICE & REQUEST FOR QUALIFICATIONS TOWN OF GILBERT**

Services: HOME Affordable Rental Home Program

RFQ Number: 319001038

RFQ Opening/Deadline for Submittal: 2:00 P.M. Local Arizona Time March 19, 2019

Location: Conference Room 202A Municipal Center, Room 233, 50 East Civic Center Drive, Gilbert, AZ 85296

Town Staff Contact/ telephone number: –Diane Shannon [Diane.Shannon@gilbertaz.gov](mailto:Diane.Shannon@gilbertaz.gov) 480-503-6818

Contract Documents available at: Bid documents may be downloaded from [www.gilbertaz.gov/rfp](http://www.gilbertaz.gov/rfp) at no charge.

**Date and Location for Submittal of Sealed Submittals:** Sealed SOQ's will be received at the Town of Gilbert Purchasing Office, Attn: Diane Shannon, Municipal Center, 50 East Civic Center Drive, Gilbert, Arizona 85296 until **2:00 p.m. Local Arizona Time, March 19, 2019**, for the above services. SOQs must be submitted in a sealed envelope clearly marked on the outside with the name of the services and the RFQ number. Any SOQ received after the time specified will be returned unopened. It is the submitter's responsibility to assure SOQ are received at the above location on or before the specified time. SOQs will be opened at 2:00p.m.in **Conference Room 202A** and the names of submitters publicly read aloud immediately after the time for receiving RFQs.

**Pre-Submittal Conference:** A pre-submittal conference will be held on **February 27 2019, at 2:00 p.m.** at the Municipal Center, **Conference Room 233**, 50 East Civic Center Drive, Gilbert, Arizona 85296.

**Work Summary:** Gilbert seeks HOME Affordable Rental Home Program services. The contract term will commence upon execution of the contract and continue through June 30, 2020, subject to four (4) one (1) year extension periods, at the Town's sole discretion and contingent on funding from HOME consortium. The services are generally described as follows: Permanent affordable rental housing units in Gilbert, Arizona.

**Submittal Requirement:** Each SOQ will be in accordance with the RFQ requirements, set forth in the Request for Qualifications, which may be downloaded from [www.gilbertaz.gov/rfp](http://www.gilbertaz.gov/rfp) Any SOQ which does not conform in all material respects to the Request for Qualifications will be considered non-responsive.

**Right to Reject Submissions:** Gilbert reserves the right to reject any or all SOQs, waive any informality in a SOQ or to withhold the Award for any reason Gilbert determines.

**Equal Opportunity:** Gilbert is an equal opportunity employer. Minority and women's business enterprises are encouraged to submit submissions on this solicitation.

TOWN OF GILBERT, ARIZONA Publications Date(s) February 19, 20, 21, 22, 2019

Services RFP  
Form No. 1.3.5  
Revised August 2, 2013

**IMPORTANT  
SUBMITTER'S CHECK LIST**

- 1. The SOQ has been signed in the Section IV. (Submittals not signed in this section will not be considered.)
- 2. Authorized Signature Form is enclosed.
- 3. Intentionally omitted
- 4. Any required descriptive literature or other information have been included.
- 5. The Contract Time and/or schedules have been included.
- 6. Any addendums have been included/noted in Offer Section. (See Section 4.6)
- 7. The mailing envelope/package has been addressed to:
  - Purchasing Department
  - Attn: Diane Shannon
  - 50 East Civic Center Drive
  - Gilbert, Arizona 85296
- 8. SOQ Package/Envelope has been identified with RFQ number and title.
- 9. The SOQ is submitted in time to be received and stamped in by Town of Gilbert's Receptionist no later than specified time on designated date. (Otherwise the SOQ cannot be considered.)

REQUEST FOR QUALIFICATIONS DOCUMENTS FOR:  
319001038  
FOR THE TOWN OF GILBERT, ARIZONA

Gilbert intends to purchase HOME Affordable Rental Housing Unit services in compliance with these specifications.

I. REQUIREMENTS FOR SUBMITTERS.

1.1 RFQ Opening Date and Location: Submissions will be received in the office of the Town Clerk, Municipal Center, 50 East Civic Center Drive, Gilbert, Arizona 85296, until **2:00 p.m. Local Arizona Time, on March 19, 2019**, at which time the names of the submitters will be opened and publicly read. Late submissions will not be considered.

1.2 RFQ Documents Available: The RFQ Documents consist of four parts: I. Requirements for Submitters, II. General Conditions, III. Scope of Work, and IV. Submitter's Submittal (form). The RFQ Documents are available for downloading from [www.gilbertaz.gov/rfp](http://www.gilbertaz.gov/rfp)

1.3 Incorporation of Submittal Documents: All of the SOQ Documents apply to and become a part of the terms and conditions of the submittal.

1.4 Submittal Form: SOQs must be submitted only on the submittal form. All SOQs must be submitted in a sealed envelope clearly marked "**Submission for HOME Affordable Rental Housing Unit Services - Purchasing Department, Attn: Diane Shannon, Solicitation 319001038.**"

1.5 Pre-submittal Conference: A Pre-Submittal Conference will be held at **2:00 p.m. February 27, 2019**, at the Town of Gilbert Municipal Building I, Conference Room 233, located at 50 E. Civic Center Drive, Gilbert, AZ 85296. The Scope of Work will be reviewed, discussed and opened for questions. **Potential submitters are highly advised to attend.** Potential submitters will be able to ask for interpretations and clarifications of this RFQ at that time. Gilbert will not be responsible to convey any clarifications to potential submitters who are not in attendance.

1.6 Town's Right to Reject Submittals: The Town of Gilbert reserves the right to reject any and all submittals and to waive technicalities.

1.7 Late Submittals: Late submittals and/or unsigned SOQs will not be considered under any circumstances. Envelopes containing SOQs with insufficient postage will not be accepted by Gilbert. It is the sole responsibility of the Submitter to see that his/her SOQ is delivered and

received by the proper time and at the proper place.

1.8 Submittal Amendment or Withdrawal: A SOQ may be withdrawn anytime before the RFQ due date and time. A SOQ may not be amended or withdrawn after the RFQ due date and time except as otherwise provided by applicable law.

1.9 Public Record: All SOQs submitted in response to this solicitation and all evaluation related records shall become property of Gilbert and shall become a matter of public record for review, subsequent to RFQ opening. Request for nondisclosure of data such as trade secrets and other proprietary data, must be made known in writing to Gilbert in SOQs submitted, and the information sought to be protected clearly marked as proprietary. Gilbert will not insure confidentiality of any portion of the SOQs that is submitted in the event that a public record request is made. Gilbert will provide 48 hours notice before releasing materials identified by the SOQ as confidential or proprietary in order for the submitter to apply for a court order blocking the release of the information.

1.10 Persons with Disabilities: Persons with a disability may request a reasonable accommodation, such as a sign language interpreter, by contacting the Clerks Office. Requests shall be made as early as possible to allow time to arrange the accommodation.

1.11 RFQ Acceptance Period: All SOQs shall remain open for 90 days after the day of the opening of RFQ, but Gilbert may, at its sole discretion, release any submission and return the submission security (as applicable) prior to that date. No Submitter may withdraw his SOQ during this period without written permission from Gilbert. Should any Submitter refuse to enter into a contract, under the terms and conditions of the procurement, Gilbert may retain the security (as applicable), not as a penalty, but as liquidated damages.

1.12 Addendum: This Request for Qualifications may only be modified by a written Addendum. Potential Submitters are responsible for obtaining all addenda.

1.13 Submitter Registration: Intentionally omitted

1.14 SOQ Bond: None required

1.15 General Evaluation Standards:

1.15.1 Gilbert seeks to obtain the services described in the Scope of Work. Gilbert will evaluate submittals on the selection criteria set forth below, listed in their order of relative importance. Gilbert will be the sole judge of whether the services offered are acceptable. Submittals from individuals who have provided inadequate services to municipalities in the past, or submittals offering services proven unsatisfactory in Town's sole judgment may be rejected and not considered.

- A. Firm Experience and Capability
- B. Expertise of Firm's Key Staff
- C. Local Firm Consideration
- D. Prior Projects with Town
- E. Other Prior Projects
- F. Insurability

1.15.2 Gilbert reserves the right to reject any or all Submittals or any part thereof, or to accept any SOQ, or any part thereof, or to withhold the award and to waive or decline to waive irregularities in any submittal when it determines that it is in its best interest to do so.

1.15.3 A Submitter (including each of its principals) who is lawfully prohibited from any public procurement activity may have its Submittal rejected.

1.15.4 Clarifications. Gilbert reserves the right to obtain Submittal clarifications where necessary to arrive at full and complete understanding of Submitter's product, service, and/or solicitation response. Clarification means a communication with a Submitter for the sole purpose of eliminating ambiguities in the SOQ and does not give Submitter an opportunity to revise or modify its submission.

1.15.5 Waiver and Rejection Rights. The Town of Gilbert reserves the right to reject any or all Submissions or to cancel the solicitation altogether, to waive any informality or irregularity in any Submission received, and to be the sole judge of the merits of the respective SOQs received.

1.16 Submittal Preparation:

1.16.1 Format. Submitters shall submit their SOQ with an original and 3 copies and shall be submitted either on the forms provided in this RFQ or their substantial equivalent. Any substitute document must be legible and contain the same information requested on the forms. **Also include an electronic copy (CD or thumb drive). Please include a valid email address and phone number for the contact person for the SOQ.**

1.16.2 No Facsimile or Electronic Mail Submittals. SOQs may not be submitted in facsimile or electronically. A facsimile or electronic mail Submittal shall be rejected.

1.16.3 Typed or Ink Corrections. The Submittal shall be typed or in ink. Erasures, interlineations or other modifications in the SOQ shall be initialed in ink by the person signing the Submittal.

1.16.4 No Modifications. Modifications shall not be permitted after Statements of

Qualifications (SOQ's) have been opened except as otherwise provided under applicable law.

1.16.5 Content. The Submittal shall contain all of the following information:

Brief Description of the Submitter's Firm

- A. Office location
- B. Length of time in business
- C. Total number of employees and number of local employees
- D. Names of principals, their disciplines, and Arizona registration.
- E. Services provided by the firm
- F. Experience in providing similar services within the last 3 years
- G. Three (3) references

Subcontractors:

Please list any firms that will act as subcontractors to your firm. Provide information regarding prior projects on which subcontractors have worked with your firm.

Project Team:

List those individuals who will do the work on this Contract. Provide the following information for each team member:

- A. Team assignment
- B. General qualifications
- C. Any project experience directly relevant to this Contract while with this firm
- D. Indicate current work load and *certify* that no team members will be substituted without prior approval from the Town of Gilbert
- E. **Name, phone number and email address of the key contact for your firm**

Relevant Experience:

Include brief descriptions of Services completed by the project team that directly relate to this Contract. Information requested includes project name, client, locations, budget, completion date, and functional use of the facility. Current client contact and telephone numbers for each project are also requested. Indicate whether the design was completed on schedule, within budget, and please indicate and describe the circumstances. Also, indicate design problems encountered and solutions to those problems which were developed by the project team.

Approach:

Demonstrate the understanding of the Services and the steps you will undertake to accomplish the task. Discuss the firm's unique ability, if any, to professionally provide project management services.

1.16.6 Request for Qualifications (RFQ) Addendum Acknowledgement. Each RFQ Addendum shall be acknowledged in the Submittal Section, which shall be submitted together with the SOQ on the RFQ due date and time. Failure to note a RFQ Addendum may result in rejection of the Submittal.

1.16.7 Evidence of Intent to be Bound. The SOQ form within the Solicitation shall be submitted with the SOQ and shall include a signature by a person authorized to sign the Submission. The signature shall signify the Submitter's intent to be bound by its Submittal and the terms of the Solicitation and that the information provided is true, accurate and complete. Failure to submit verifiable evidence of intent to be bound, such as an original signature, shall result in rejection of the SOQ.

1.16.8 Non-Collusion and Non-Discrimination. By signing and submitting the SOQ, the Submitter certifies that: the Submitter did not engage in collusion or other anti-competitive practices in connection with the preparation or submission of its SOQ; and the Submitter does not discriminate against any employee or applicant for employment or person to whom it provides services because of race, color, religion, age, sex, national origin, or disability, and that it complies with all applicable Federal, state and local laws and executive orders regarding employment.

1.17 Inquiries

1.17.1 Duty to Examine. It is the responsibility of each Submitter to examine the entire RFQ, seek clarification (inquiries), and examine its Submittal for accuracy before submitting the SOQ. Lack of care in preparing a Submittal shall not be grounds for modifying or withdrawing the Submittal after the RFQ due date and time, nor shall it give rise to any Contract claim.

1.17.2 Contact Person. Any inquiry related to a RFQ, including any requests for or inquiries regarding standards referenced in the RFQ should be directed solely to the Contact person listed on the cover page of the RFQ. The Submitter shall not contact or direct inquiries concerning this RFQ to any other Town employee unless the RFQ specifically identifies a person other than the Contact Person as a contact.

1.17.3 Submission of Inquiries. All inquiries except those at the Pre-Submittal Conference shall be submitted in writing and shall refer to the appropriate RFQ number, page and paragraph. Inquiries can be submitted via email to the contact person listed on page 1 of the

RFQ. Gilbert shall consider the relevancy of the inquiry but is not required to respond in writing.

1.17.4 Timeliness. Any inquiry or exception to the RFQ shall be submitted as soon as possible and should be submitted at least ten (10) days before the Submission due date and time for review and determination by Gilbert. Failure to do so may result in the inquiry not being considered for a RFQ Addendum.

1.17.5 No Right to Rely on Verbal Responses. A Submitter shall not rely on verbal responses to inquiries. A verbal reply to an inquiry does not constitute a modification of the RFQ.

## II. GENERAL CONDITIONS

2.1 Contract Term; Renewal. If funds for this Contract are not appropriated or budgeted by July 1, 2019, Gilbert may terminate this contract by giving written notice to Contractor. Otherwise, The Contract commences upon execution contingent upon execution of the IGA with Maricopa County. Services shall not commence until issuance of a Notice to Proceed or Purchase Order by Gilbert. All services shall be completed in accordance with agreed milestone dates in compliance with the IGA, as set forth in the Contract and/or Notice to Proceed. Any intermediate deadlines or milestones will be included in the Notice to Proceed.

2.2 Bonds: ***INTENTIONALLY OMITTED***

2.3 Cooperative Use of Contract: Upon written approval of the Successful Submitter and Gilbert, this Contract may be tendered for use by other municipalities and government agencies.

2.4 Protests: Pursuant to the Municipal Code Section 2-365, a submitter may protest a solicitation or a contract award by filing a protest in writing with the purchasing officer not less than 72 hours before the closing date and time of the solicitation, or within 72 hours after issuance of a notice of apparent low responsive and responsible bidder, or a notice of intent to award. The protest shall include the following information: (1) the name, address and telephone number of the protester; (2) the signature of the protester or its authorized representative; (3) a detailed statement of the legal and factual grounds of the protest, including copies of relevant documents.

2.5 Solicitation Transparency Policy: Beginning on the date this Solicitation is issued and continuing until either the date a contract is awarded or this Solicitation is withdrawn by Gilbert, all persons or entities who respond or intend to respond to this Solicitation, including without limitation their employees, agents, representatives, partners, subcontractors, consultants, joint venturers, members, lobbyists, or attorneys (collectively, "Submitters"), shall only discuss



matters associated with this Solicitation with the Procurement Officer designated in this Solicitation and shall not have any direct or indirect contact about this Solicitation with any other Town staff or Town official, including, without limitation, members of the evaluation panel, the Town Manager, Deputy Town Managers, the Mayor, or any member of the Gilbert Town Council. As long as the subject matter of the Solicitation is not discussed, Submitters may continue to conduct business with Gilbert.

Notwithstanding the foregoing, Submitters may discuss this Solicitation with the Mayor or a member of the Gilbert Town Council, provided such meetings are scheduled through the Procurement Officer listed on this Solicitation, conducted in person at 50 E. Civic Center Drive, Gilbert, Arizona 85296, and are posted as open meetings by the Town Clerk at least twenty-four (24) hours prior to the scheduled meetings. The posted notice shall identify the participants and the subject matter, as well as invite the public to participate.

This policy is intended to create a level playing field for all Submitters, assure that contracts are awarded in public, and protect the integrity of the selection process. **Submitters who violate this policy shall be disqualified from participating in this Solicitation.**

### III. SCOPE OF WORK

To provide permanent affordable rental housing units in Gilbert, Arizona using federal HOME funds awarded to GRANTEE by the U.S. Department of Housing and Urban Development (“HUD”), as authorized under Title II of the Cranston-Gonzalez National Affordable Housing Act of 1990 that would include the acquisition, rehabilitation and rental of up to one to two (1-2) single family dwelling units to qualified low to moderate income renters in Gilbert.

Contractor shall perform the following services and adhere to the federal regulations of HOME Investment Partnership Funds as follows:

- Contractor will purchase 1-2 vacant dwelling units within Gilbert Town limits;
- Contractor will take title of the dwelling unit(s) upon close of escrow, naming the Town of Gilbert as a second lien holder;
- Contractor will rehabilitate dwelling units to meet Housing Quality Standards as described in 24 CFR 92.251 and maintain dwelling units to the standard during the period of affordability;
- Contractor will be responsible for all maintenance, insurance and expenses incurred on behalf of the dwelling unit(s) acquired under the agreement;
- Contractor will rent dwelling units as permanent affordable rental homes to qualified low- to moderate- income households whose annual household income does not exceed 60% of area median income.

HOME Regulations:

- Contractor must provide a 25% non-federal match to the HOME funds utilized;
- Contractor must provide a complete housing market analysis with the submission in accordance with HOME regulations;
- Dwelling unit(s) must be maintained as affordable rental housing for an affordability period of 15 years;
- The appraised value of the dwelling unit(s) after rehabilitation per Section 92.254(a)(2)(iii) must not exceed the area median purchase price for single family housing, as determined by HUD.
- Contractor must adhere to annual rent controls as required by HOME fund regulations during the period of affordability.

Timeline:

- Dwelling units must be under contract for purchase in accordance with the milestones outlined in the notice to proceed.
- Reimbursement requests for dwelling unit purchase and rehabilitation shall be submitted in accordance with the milestones outlined in the notice to proceed.
- Dwelling units must be occupied by an income eligible household by the milestone date as outlined in the notice to proceed.



\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

SUBSCRIBED AND SWORN TO BEFORE ME this \_\_\_\_ day of \_\_\_\_\_,  
20 \_\_, by \_\_\_\_\_.

\_\_\_\_\_  
Notary Public

My Commission Expires:

\_\_\_\_\_

**TOWN OF GILBERT, ARIZONA**  
**AUTHORIZED SIGNATURE FORM**

Gilbert Contract Number: 319001038

Contractor Name: \_\_\_\_\_

WHEREAS, the Town of Gilbert requires that Contractor execute documents necessary for the prompt and efficient execution of the business related to the CONTRACT;

NOW, THEREFORE, on behalf of the Contractor, I hereby declare that

\_\_\_\_\_  
(Name of Parties Authorized)

is/are authorized to execute and sign on behalf of said Contractor the following documents:

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>1. The CONTRACT</li> <li>2. The Bond</li> <li>3. Payrolls</li> <li>4. Claims</li> </ul> | <ul style="list-style-type: none"> <li>5. CHANGE ORDERS</li> <li>6. All other papers necessary<br/>for the conduct of the<br/>corporation's affairs and<br/>the execution of the CONTRACT</li> </ul> |
|--|--|

The above-named person is granted the authority and duties herein referenced for the duration of the CONTRACT for this PROJECT or until express notice of revocation has been duly given in writing, whichever is the lesser period. In the event Contractor is governed by a Board of Directors, a copy of the Resolution of the Board granting authority to said person(s) is attached hereto, and I hereby verify that such Resolution remains in full force and effect.

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

(Seal of Corporation)

STATE OF \_\_\_\_\_ )  
) ss.  
County of \_\_\_\_\_ )

I, \_\_\_\_\_ of the \_\_\_\_\_ corporation, do hereby certify that the above is a true and correct copy of a resolution adopted by the Board of Directors of said corporation, at a meeting of said Board held on \_\_\_\_\_, 20\_\_\_\_\_, and that the same is in full force and effect at this time.

DATED \_\_\_\_\_, 20\_\_\_\_\_.

\_\_\_\_\_  
(Officer of Corporation)

(Seal of Corporation)

STATE OF \_\_\_\_\_ )  
  ) ss.  
County of \_\_\_\_\_ )

This instrument was acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_ by \_\_\_\_\_, appearing before the undersigned Notary Public, and stated that he executed such instrument on behalf of said corporation for the purpose and consideration therein expressed.

\_\_\_\_\_  
Notary Public

My Commission Expires:

\_\_\_\_\_

## ATTACHMENTS

- Exhibit A: Developer Agreement

- Exhibit B: Current IGA with Maricopa – For Information ONLY