**Housing Authority of**

## Request for Qualifications for

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**Instructions for Reviewing Proposals**

1. **Review key evaluation criteria and definitions (MODIFY CRITERIA AS NECESSARY)**

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| FIRST PHASE OF PROPOSAL REVIEW – ALL RESPONDENTS | | |
| Management Capacity | Evidence of ability to perform the work   1. Qualifications, experience and expertise of each team member assigned to the project (principals and primary staff) 2. Current project load and capacity of team to effectively manage this project | 20 |
| Experience | Evidence of past experience with mixed-income development and construction of projects of similar scope and size   1. Past or current affordable housing projects for a variety of income levels utilizing a variety of housing programs, grant sources (HUD, Choice Neighborhoods, etc), funding sources such as RAD, LIHTC, HTC, ad HUD programs such as Section 18 demolition/ disposition 2. Experience in developing land and mixed-income housing units that utilized innovative and creative approaches 3. Experience in repositioning public housing 4. Past performance in quality of work, cost control, and compliance with performance schedules and regulatory requirements 5. Past experience with historically designated properties 6. References | 20 |
| Project Approach | Degree to which the proposer illustrates the overall vision for the project   1. Evidence the developer understands the project and Agency’s goals, whether from experience with similar projects or from preparatory research 2. Developer’s proposed scope of work addresses the project issues and indicates a good understanding of the historic context, local market, and resident protections 3. Level of community engagement throughout the planning, design and implementation process with residents, the GGV Resident Council, and other stakeholders | 30 |
| Financial Experience/Capacity | Developer team’s documented ability to obtain financial commitments from:   1. Federal, state and local agencies, private investors, and banks. 2. A proven track record of creative and viable financial plans that do not rely principally on the Agency’s funding. | 20 |
| Human Capital Plan | Detailed Human Capital plans, with a significant commitment to:   * + - * 1. Human Capital goals noted in the Community Objectives         2. Assisting resident attain and stay in good standing         3. Appropriate and innovative services to help residents improve their lives through better health, education, and job security | 10 |
| Section 3 Plan | Detailed Section 3 Plan, outlining the Developer’s Plan to:   * 1. Create employment and business opportunities for residents of the Housing Authority and other qualified low- and very low-income persons residing in Marin County   2. Aid the Agency in complying with its goals as outlined in the Agency’s Section 3 and D/WBE Policy. | 5 |
| **Total Points** | | **105** |
| SECOND PHASE OF PROPOSAL REVIEW – FOR INTERVIEWED RESPONDENTS ONLY | | |
| Business Terms | Reasonableness of proposed business terms, fee structure, cost sharing, and fee sharing. | 20 |
| **Total Points** | | **125** |

1. **Review each proposal.** Review each of the proposals and use the evaluation form to note key information and questions about the responses and to provide an initial draft score based on the RFQ criteria. The HUD Procurement Handbook states that when evaluators score a submittal: *“A narrative should accompany the scores to explain how the scores were derived, detailing the significant strengths, weaknesses, and deficiencies in the proposal. The level of detail for the evaluation report will be influenced by the complexity of the procurement, with more complex procurements likely requiring more detailed reports.”* These Evaluation Forms must be completed fully, and you must detail the “significant strengths, weaknesses and deficiencies” you identified in the proposal to support your scoring. All information entered must be provided clearly and in a legible manner.
2. **Evaluation Committee (EC) Round 1 Scoring** 
   1. After each EC member reviews the proposals and scores the proposals individually, the EC will then meet to discuss their preliminary individual scores and thoughts on the proposals. This is expected to be an educational process for EC members as everyone provides their thoughts on each proposer and listens to others who bring different and unique perspectives to the review process.
   2. After the conclusion of the discussion, EC members will have the opportunity to adjust and finalize their scores and narrative comments to reflect any changes in their opinion of the proposals as a result of the discussion. All EC members’ evaluations will be collected and tabulated by the Procurement Officer into a single compiled scoring sheet.
   3. References will not be fully completed at this stage so no points for references will be awarded by the EC. The references are included under the Experience section and will entail three (3) points of the overall twenty (20) points.
   4. The EC combined scores for each proposer will be ranked from highest to lowest and the EC will determine the competitive range of proposers who should participate in the Round 2 formal interviews.
   5. After establishing the competitive range, EC members will develop a list of standard questions to ask all proposers who will be interviewed and a list of clarifying questions specific to each proposal, if necessary.
   6. PHA will notify the proposers in the competitive range that they have been chosen to move onto the next round and ask them to participate in the interviews scheduled for October 22 and 23. Prior to the interviews, each proposer will be sent the questions as well as a description of the format for the interview session.
3. **Evaluation Committee (EC) Round 2 Interviews and Scoring**
   1. EC members will meet with each Round 2 proposer for approximately 90 minutes. The proposers will be asked to make a 20-30 minute presentation, which will be followed by 60-70 minutes of questions by the EC. EC members will take turns asking questions (standard and clarifying) of the proposers.
   2. After all interviews have been completed, EC members will rescore all of the proposers on all evaluation factors, including the Business Terms and interviews. EC members may use their previous individual Evaluation forms for reference and note any changes/revisions to their scoring and reasoning.
   3. Again, all EC members’ evaluations will be collected and tabulated by the Procurement Officer into a single compiled evaluation. The EC will review the final ranking based on the new scores.
4. **Reference Checks and Best and Final Offers**
   1. Within one week of the interviews, PHA or its designee will complete reference checks for the Round 2 proposers.
   2. During this period, proposers will be requested to submit Best and Final Offers regarding proposed Business Terms.
   3. PHA or its designee will update the EC group scoring forms with points based on reference checks and Best and Final Offers. Proposers will be ranked for the final time and PHA or its designee will draft the justification for selection and prepare a recommendation for Board approval and submit to PHA for review.
   4. The PHA Board will be asked to approve the Executive Director moving forward with negotiations with the highest-ranked proposer.