



SOLICITATION NUMBER: CH-RFP-26-P-03
REQUEST FOR PROPOSAL
FOR
ON-CALL AFFORDABLE HOUSING DEVELOPEMENT AND LIHTC CONSULTING SERVICES
BY
COUNTY HOUSING
8865 NATURAL BRIDGE
ST. LOUIS, MO 63121

PROPOSALS ARE DUE TO THE ADDRESS OR EMAIL SHOWN BELOW NO LATER THAN:

31 August 2026/ 2 PM Central Standard Time

MAILING ADDRESS

COUNTY HOUSING
ATTN: PURCHASING DEPARTMENT
8865 NATURAL BRIDGE ST. LOUIS, MO. 63121

IN-PERSON DELIVERY

GRAY DROP BOX ON THE FRONT OF THE PARKING LOT

ELECTRONIC DELIVERY

EMAIL: purchase@countyhousing.org

THE RESPONSIBILITY FOR SUBMITTING A RESPONSE TO THIS RFP AT THE OFFICES OF THE COUNTY HOUSING (COUNTY HOUSING) ON OR BEFORE THE STATED TIME AND DATE WILL BE SOLELY AND STRICTLY THE RESPONSIBILITY OF THE OFFEROR. COUNTY HOUSING WILL IN NO WAY BE RESPONSIBLE FOR ANY DELAYS CAUSED BY THE UNITED STATES POSTAL SERVICE, PRIVATE COURIER, EXPRESS SERVICE, OR CAUSED BY ANY OTHER OCCURRENCE.

Introduction

The Housing Authority of St. Louis County (“County Housing”) invites proposals from qualified firms and individuals to provide professional consulting and development services related to the development of affordable housing utilizing the Low-Income Housing Tax Credit (LIHTC) program.

County Housing intends to establish two pools of qualified firms that may be engaged on a project-by-project basis to assist with the development and financing of affordable housing.

Tax credits in Missouri are allocated by the Missouri Housing Development Commission pursuant to Section 42 of the Internal Revenue Code administered by the Internal Revenue Service.

County Housing anticipates pursuing affordable housing developments utilizing:

- a) 9% competitive LIHTC
- b) 4% LIHTC with tax-exempt bonds
- c) Federal and state housing subsidies
- d) Local government funding sources

Purpose of the RFP

The purpose of this RFP is to:

- a) Identify qualified firms with expertise in affordable housing development and LIHTC financing.
- b) Establish a pre-qualified consultant and development partner pool.
- c) Provide County Housing flexibility to assign firms to specific projects through task orders or development agreements.

Selection under this RFP does not guarantee work.

Consultant Pool Categories

Respondents may apply for **one or both categories**

a) Category A – LIHTC Application Consultants

These firms provide technical expertise in LIHTC application preparation and financial modeling.

Typical services will include:

- i. LIHTC financial structuring
- ii. Development feasibility analysis
- iii. Application preparation
- iv. QAP scoring strategy
- v. Third-party report coordination
- vi. Submission of applications to the Missouri Housing Development Commission

These consultants generally will not take development risk

b) Category B – Co-Developer / Development Partner

These firms may serve as development partners to County Housing and may share development responsibilities and risks.

Responsibilities may include:

- i. Securing project financing
- ii. Structuring development partnerships
- iii. Negotiating equity investment
- iv. Providing development guarantees
- v. Managing the development process
- vi. Overseeing construction and project delivery

Co-developers may receive a portion of the developer fee.

Background

County Housing is a public housing authority organized under the laws of the State of Missouri. County Housing seeks to expand the supply of affordable housing through new construction, acquisition, and rehabilitation of residential properties.

County Housing anticipates pursuing developments that may include:

- a) Family housing
- b) Workforce housing
- c) Senior housing
- d) Permanent supportive housing
- e) Preservation of existing affordable housing

Funding sources may include:

- a) LIHTC
- b) CDBG-DR
- c) HOME funds
- d) Federal Home Loan Bank Affordable Housing Program
- e) Local housing trust funds
- f) Tax-exempt bond financing

1. COUNTY HOUSING Reservations of Rights

COUNTY HOUSING reserves the right to:

- (a) Right to Reject, Waive, or Terminate the RFP.** Reject any or all proposals, to waive any informality in the RFP process, or to terminate the RFP process at any time, if deemed by the Agency to be in its best interests.
- (b) Right to Not Award.** Not award a contract pursuant to this RFP.
- (c) Right to Terminate.** Terminate a contract awarded pursuant to this RFP, at any time for its convenience upon 10 days written notice to the Contractor(s).

- (d) **Right to Determine Time and Location.** Determine the days, hours, and locations that the successful proposer (hereinafter, “Contractor”) shall provide the services called for in this RFP.
- (e) **Right to Retain Proposals.** Retain all proposals submitted and not permit withdrawal for a period of 60 days after the deadline for receiving proposals without the written consent of COUNTY HOUSING Planning and Procurement Officer.
- (f) **Right to Negotiate.** Negotiate the fees proposed by the proposer entity.
- (g) **Right to Reject Any Proposal.** Reject and not consider any proposal or proposer that does not meet the requirements of this RFP, including but not necessarily limited to incomplete proposals and/or proposers offering alternate or non-requested services.
- (h) **No Obligation to Compensate.** Have no obligation to compensate any proposer for any costs incurred in responding to this RFP.
- (i) **Right to Prohibit.** At any time during the RFP or contract process, prohibit any further participation by a proposer or reject any proposal submitted that does not conform to any of the requirements detailed herein. By accessing and by obtaining this document, each prospective proposer is thereby agreeing to abide by all terms and conditions listed within this document, and further agrees that he/she will inform the Planning and Procurement Officer in writing within 5 days of the discovery of any item listed herein or of any item that is issued thereafter by COUNTY HOUSING that he/she feels needs to be addressed. Failure to abide by this timeframe shall relieve COUNTY HOUSING, but not the prospective or actual proposer, of any responsibility pertaining to such an issue.

2. Scope of Services

Selected firms may be assigned to projects through Task Orders under a Master Consulting Agreement.

2.1 Category A – LIHTC Application Consultants

2.1.1 Project Feasibility

2.1.1.1 Consultants may be asked to:

- 2.1.1.1.1 Evaluate potential development sites
- 2.1.1.1.2 Conduct financial feasibility analysis
- 2.1.1.1.3 Evaluate LIHTC competitiveness
- 2.1.1.1.4 Prepare preliminary development budgets
- 2.1.1.1.5 Identify potential funding sources

2.1.2 Development Structuring

2.1.2.1 Services may include:

- 2.1.2.1.1 Development budget preparation

2.1.2.1.2 Sources and uses of funds analysis

2.1.2.1.3 Financial pro forma modeling

2.1.2.1.4 Identification of equity investors

2.1.2.1.5 Coordination of funding sources

2.1.3 LIHTC Application Preparation

2.1.3.1 Consultants may be required to:

2.1.3.1.1 Prepare LIHTC applications

2.1.3.1.2 Assemble supporting documentation

2.1.3.1.3 Coordinate required third-party reports

2.1.3.1.4 Prepare scoring documentation

2.1.3.1.5 Submit applications to the Missouri Housing Development Commission

2.1.4 Development Team Coordination

2.1.4.1 Consultants may coordinate or assist in selecting:

2.1.4.1.1 Architects

2.1.4.1.2 Engineers

2.1.4.1.3 Market analysts

2.1.4.1.4 Environmental consultants

2.1.4.1.5 Legal counsel

2.1.4.1.6 Property management firms

2.1.5 Post-Award Services (if applicable)

2.1.5.1 If requested, consultants may assist with:

2.1.5.1.1 Carryover allocation documentation

2.1.5.1.2 Equity closing support

2.1.5.1.3 Cost certification

2.1.5.1.4 Placed-in-service documentation

2.2 Category B – Co-Developer / Development Partner

Firms selected under Category B may be engaged by County Housing as co-developers or development partners for specific projects. The Development Partner will work collaboratively with County Housing to plan, finance, and deliver affordable housing developments utilizing LIHTC and other funding sources. Services may include, but are not limited to, the following:

2.2.1 Predevelopment and Project Initiation

2.2.1.1 Assist in site identification and acquisition strategy

2.2.1.2 Conduct due diligence, including:

2.2.1.2.1 Financial feasibility

2.2.1.2.2 Market analysis coordination

2.2.1.2.3 Environmental review coordination

2.2.1.3 Evaluate development risks and mitigation strategies

2.2.1.4 Assist County Housing in defining project scope, unit mix, and target populations

2.2.2 Project Structuring and Financing

2.2.2.1 Structure ownership entities and partnership agreements

2.2.2.2 Identify and secure financing sources, including:

2.2.2.2.1 LIHTC equity

2.2.2.2.2 Tax-exempt bonds (if applicable)

2.2.2.2.3 Gap financing (HOME, CDBG, etc.)

2.2.2.2.4 Philanthropic dollars

2.2.2.3 Lead negotiations with equity investors/syndicators

2.2.2.4 Coordinate construction and permanent financing

2.2.2.5 Develop and maintain detailed financial pro formas

2.2.3 LIHTC Application and Entitlements

2.2.3.1 Lead or support preparation of LIHTC applications to the Missouri Housing Development Commission

2.2.3.2 Develop competitive scoring strategies

2.2.3.3 Coordinate zoning, land use approvals, and entitlements

- 2.2.3.3.1 Manage community engagement and public approval processes

2.2.4 Development Management

- 2.2.4.1 Oversee the development process from concept through completion

- 2.2.4.2 Procure and manage key development team members, including:

- 2.2.4.2.1 Architects
- 2.2.4.2.2 Engineers
- 2.2.4.2.3 General contractors
- 2.2.4.2.4 Third-party consultants

- 2.2.4.3 Monitor project schedule, budget, and milestones

- 2.2.4.3.1 Provide regular reporting to County Housing

2.2.5 Construction Oversight

- 2.2.5.1 Monitor construction progress and quality
- 2.2.5.2 Review and approve pay applications
- 2.2.5.3 Coordinate with lenders and inspectors
- 2.2.5.4 Manage change orders and cost controls

2.2.6 Financial Closing and Compliance

- 2.2.6.1 Lead financial closing activities
- 2.2.6.2 Coordinate legal documentation and partnership agreements
- 2.2.6.3 Ensure compliance with LIHTC and other funding requirements
- 2.2.6.4 Manage cost certification process

2.2.7 Post-Construction and Lease-Up

- 2.2.7.1 Support lease-up and stabilization efforts
- 2.2.7.2 Coordinate with property management
- 2.2.7.3 Address operating deficits (if applicable)
- 2.2.7.4 Ensure achievement of placed-in-service and IRS requirements

2.2.8 Guarantees and Risk Sharing

2.2.8.1 Depending on the project and negotiated development agreement, the Development Partner may be required to provide:

2.2.8.1.1.1 Completion guarantees

2.2.8.1.1.2 Operating deficit guarantees

2.2.8.1.1.3 Tax credit adjuster guarantees

The specific scope of guarantees will be defined in project-specific agreements.

2.2.9 Developer Fee and Compensation

2.2.9.1 Development Partners may receive a portion of the developer fee

2.2.9.2 Fee splits will be negotiated on a project-by-project basis

2.2.9.3 All fees must comply with limits established by the Missouri Housing Development Commission

3. Missouri LIHTC Program Experience

Respondents must demonstrate knowledge of the requirements of the Missouri Housing Development Commission including:

3.1 Qualified Allocation Plan (QAP)

3.2 Threshold eligibility requirements

3.3 Underwriting standards

3.4 Developer fee limitations

3.5 Compliance with monitoring requirements

Experience with both 9% and 4% tax credit transactions is preferred.

Respondents must demonstrate:

- Minimum five (5) years' experience in affordable housing development or consulting
- Experience preparing LIHTC applications
- Successful LIHTC project experience within the last five years
- Familiarity with federal housing regulations administered by the U.S. Department of Housing and Urban Development

Relevant Experience (Attachment J)

List recent LIHTC projects including the project, city, state, year, credit type, units and more.

Approach to Services (see also Attachment J)

Describe the firm's approach to:

- LIHTC development
- Application preparation
- Development team coordination

Development Partner Experience & Capacity (if applicable)

- Prior co-development with public agencies
- Experience providing guarantees
- Balance sheet strength

4. Time of Performance/Contract Terms

Contracts will have a term of three (3) years with two optional one-year renewals.

Under no circumstances should work commence until a signed Contract and Notice to Proceed are in hand.

5. Compensation/Method of Payment

Compensation may include:

1. Fixed application preparation fees
2. Hourly consulting rates
3. Development fee participation for co-developers
4. Success-based payments tied to LIHTC awards

Consultant fees must comply with limits established by the Missouri Housing Development Commission.

Invoices should be clearly marked with the “Contract Number” and detailed by addresses that were cut. County Housing may require contractors to provide certified payroll, to ensure the contractor is complying with the attached minimum wage requirements.

Billings will provide a description of work performed; number of hours worked, hourly billing rates and other expenses chargeable to the Contract. All invoices to be mailed to: Accounts Payable Office, COUNTY HOUSING, 8865 Natural Bridge Road, St. Louis, MO 63121. COUNTY HOUSING will determine satisfactory performance under the Contract.

6. Validation of Labor Charges. To substantiate billing for labor charges, the Contractor is obligated to record the time spent on each job and the name of the Housing County Housing representatives that called in the job.

7. Proposal Format

7.1 Tabbed Proposal Submittal. COUNTY HOUSING intends to retain a Contractor using the competitive proposal process pursuant to a “Best Value,” not a “Lowest Price” basis. “Best Value,” consider factors other than just price in making the award decision. Therefore, so that COUNTY HOUSING can properly evaluate the offers received, all proposals submitted in response to this RFP must be formatted in accordance with the sequence noted in the table below. Each category must be separated by numbered index dividers and labeled with the corresponding tab reference also noted below. None of the proposed services may conflict with any requirement COUNTY HOUSING has published herein or has issued by addendum.

Tab No.	Description
1	Form of Proposal. This Form is attached hereto as Attachment A to this RFP document. This form must be fully completed, executed where provided and submitted under this tab as a part of the proposal submittal.

2	HUD-5369-C (8/93), Certifications and Representations of Offerors, Non-Construction Contract. This Form is attached hereto as Attachment C to this RFP document. This form must be fully completed, executed where provided thereon and submitted under this tab as a part of the proposal submittal.
3	Profile of Firm Form. The Profile of Firm Form is attached hereto as Attachment D to this RFP document. This form must be fully completed, executed, and submitted under this tab as a part of the proposal submittal.
4	Proposed Services. As more fully detailed within SCOPE OF SERVICES , of this document, the proposer shall, at a minimum, clearly detail within the information submitted under this tab documentation showing:
	As detailed within Section PROPOSAL EVALUTION , Evaluation Factor No. 2, herein, the proposer's DEMONSTRATED UNDERSTANDING of COUNTY HOUSING'S REQUIREMENTS .
	As detailed within Section PROPOSAL EVALUTION , Evaluation Factor No. 3, herein, the QUALITY of the TECHNICAL APPROACH and the SERVICES PROPOSED .
	As detailed within Section PROPOSAL EVALUTION , Evaluation Factor No. 4, herein, the proposer's DEMONSTRATED TECHNICAL CAPABILITIES (in terms of personnel) and the MANAGEMENT PLAN (including the proposer's demonstrated standards of professionalism and customer care, follow-through on jobs, reports, accuracy, and how the proposer proposes to respond when "things go wrong").
	As detailed within Section PROPOSAL EVALUTION , Evaluation Factor No. 5, herein, the proposer's DEMONSTRATED EXPERIENCE in performing similar work and the proposer's DEMONSTRATED SUCCESSFUL PAST PERFORMANCE (including meeting costs, schedules, and performance requirements) of contract work substantially similar to that required by this solicitation as verified by reference checks or other means.
	If appropriate, how staff are retained, screened, trained, and monitored.
	The proposed quality assurance program.
	An explanation and copies of forms that will be used and reports that will be submitted and the method of submission of such reports (i.e., written; fax; Internet; etc.).
	A complete description of the products and services the firms provides.
5	Managerial Capacity/Financial Viability/Staffing Plan. The proposer entity must submit under this tab a concise description of its managerial and financial capacity to deliver the proposed services, including brief professional resumes for the persons identified within areas (5) and (6) of Attachment D, <i>Profile of Firm Form</i> . Such information shall include the proposer's qualifications to provide the services; a description of the background and current organization of the firm (including a current organizational chart).
6	Client Information. The proposer shall submit a listing of former or current clients (at least 3), including any other Public Housing County Housing, for whom the proposer has performed similar or like services to those being proposed herein.
7	Fee Structure (Attachment I) Provide proposed fees. Consultant fees must comply with developer fee limitations established by the Missouri Housing Development Commission.
8	Attachment J (LIHTC Experience and Track Record Form)

9	Attachment K (LIHTC Development Team Disclosure Form)
10	Attachment L (Sample Task Order)
11	Equal Employment Opportunity/Supplier Diversity. The proposer must submit under this tab a copy of its Equal Opportunity Employment Policy and a complete description of the positive steps it will take to ensure compliance, to the greatest extent feasible, with the regulations detailed within the following PROPOSAL SUBMISSION section herein pertaining to supplier diversity (i.e., small, minority-, and women-owned businesses).
12	Subcontractor/Joint Venture Information (Optional Item). The proposer shall identify hereunder whether or not he/she intends to use any subcontractors for this job, if awarded, and/or if the proposal is a joint venture with another firm. Please remember that all information required from the proposer under the preceding tabs must also be included for any major subcontractors (10% or more) or from any joint venture.
13	Other Information (Optional Item). The proposer may include hereunder any other general information that the proposer believes is appropriate to assist the Agency in its evaluation.
No Information Placed under a Tab. If no information is to be placed under any of the above noted tabs (especially the “Optional” tabs), please place there under a statement such as “NO INFORMATION IS BEING PLACED UNDER THIS TAB” or “THIS TAB LEFT INTENTIONALLY BLANK.” DO NOT eliminate any of the tabs.	
Proposal Submittal Binding Method. It is preferable and recommended that the proposer bind the proposal submittals in such a manner that the Agency can, if needed, remove the binding (i.e., “spiral-type” etc.) or remove the pages from the cover (i.e., 3-ring binder; etc.) to make copies, then conveniently return the proposal submittal to its original condition.	

Table 1 – Tabbed Proposal Outline

7. Fee Structure (Attachment J). Provide proposed fees. Consultant fees must comply with developer fee limitations established by the Missouri Housing Development Commission.

8. Submission Requirements

Proposals must be submitted and time-stamped received in the designated County Housing office by no later than the submittal deadline stated herein (or within any ensuing addendum). Electronic submissions must adhere to the same deadline stated, uploaded to the electronic transfer protocol referenced. A total of 1 original signature copy (marked ORIGINAL”) and 2 exact copies (each of the 3 separate proposal submittals shall have a cover and extending tabs) of the “hard copy” proposal submittal, shall be placed unfolded in a sealed package and addressed to:

COUNTY HOUSING
Attn: Manish Kadaboina, Procurement Officer
8865 Natural Bridge
St. Louis, MO 63121

The package exterior must clearly denote the above noted RFP number and must have the proposer’s name and return address. Proposals received after the published deadline will not be accepted.

DO NOT FOLD OR MAKE ANY ADDITIONAL MARKS, NOTATIONS, OR REQUIREMENTS ON THE DOCUMENTS TO BE SUBMITTED! Proposers are not allowed to change any requirements or forms

contained herein, either by making or entering onto these documents or the documents submitted any revisions or additions; and if any such additional marks, notations or requirements are entered on any of the documents that are submitted to COUNTY HOUSING by the proposer, such may invalidate that proposal. If, after accepting such a proposal, COUNTY HOUSING decides that any such entry has not changed the intent of the proposal that COUNTY HOUSING intended to receive, COUNTY HOUSING may accept the proposal and the proposal shall be considered by COUNTY HOUSING as if those additional marks, notations, or requirements were not entered on such. By accessing and accepting these documents, each prospective proposer that does so is thereby agreeing to confirm all notices that the Agency delivers to him/her as instructed, and by submitting a proposal, the proposer is thereby agreeing to abide by all terms and conditions published herein and by addendum pertaining to this RFP.

It shall be the responsibility of each proposer to be aware of and to abide by all dates, times, conditions, requirements, and specifications set forth within all applicable documents issued by COUNTY HOUSING, including the RFP document, the documents listed within the following section herein, and any addenda and required attachments submitted by the proposer. By virtue of completing, signing, and submitting the completed documents, the proposer is stating his/her agreement to comply with all conditions and requirements set forth within those documents. Written notice from the proposer not authorized in writing by the Executive Director to exclude any of COUNTY HOUSING requirements contained within the documents may cause that proposer to not be considered for award.

It is the responsibility of the proposer to address all communication and correspondence pertaining to this RFP process to the Executive Director only. Proposers must not make inquiry or communicate with any other County Housing staff member or official (including members of the Board of Commissioners) pertaining to this RFP. Failure to abide by this requirement may be cause for COUNTY HOUSING to not consider a proposal submittal received from any proposer who may not have abided by this directive.

All interested contractors must have access to adequate financial resources to fully perform the contract.

Addenda. All questions and requests for information must be addressed in writing to the Executive Director. The Executive Director will respond to all such inquiries in writing by addendum to all prospective proposers (i.e., firms or individuals that have obtained the RFP Documents). During the RFP solicitation process, the Executive Director will NOT conduct any *ex parte* (a substantive conversation — “substantive” meaning, when decisions pertaining to the RFP are made—between COUNTY HOUSING and a prospective proposer when other prospective proposers are not present) conversations that may give one prospective proposer an advantage over other prospective proposers. This does not mean that prospective proposers may not call the Executive Director—it simply means that, other than making replies to direct the prospective proposer where his/her answer has already been issued within the solicitation documents, the Executive Director may not respond to the prospective proposer’s inquiries but will direct him/her to submit such inquiry in writing so that the Executive Director may more fairly respond to all prospective proposers in writing by addendum.

9. Proposer’s Responsibilities — Equal Employment Opportunity and Supplier Diversity

Be advised that contracts over \$200,000 trigger Section 3 of the Housing and Urban Development Act of 1968. Section 3 requires that economic opportunities generated by the expenditure of HUD funds be directed, to the greatest extent feasible, to low and moderate income persons via

contracting, employment, and training. All contractors and subcontractors working on this project will need to demonstrate compliance with Section 3 numeric targets and other applicable provisions. In cases where Section 3 compliance is not achieved, contractors and subcontractors must document good-faith efforts to comply. See Attachment H – Section 3 Flyer Construction.

Within 2 CFR §200.321 it states:

Contracting with small and minority businesses, women’s business enterprises, and labor surplus area firms.

(a) The non-federal entity must take all necessary affirmative steps to assure that minority businesses, women’s business enterprises, and labor surplus area firms are used when possible.

(b) Affirmative steps must include:

(1) Placing qualified small and minority businesses and women’s business enterprises on solicitation lists.

(2) Assuring that small and minority businesses, and women’s business enterprises are solicited whenever they are potential sources.

(3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority business, and women’s business enterprises.

(4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority business, and women’s business enterprises.

(5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and

(6) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (1) through (5) of this section.

Within HUD Procurement Handbook 7460.8 REV 2 it states:

(a) Section 15.5.A, Required Efforts. Consistent with Presidential Orders 11625, 12138, and 12432, the [Agency] shall make every effort to ensure that small businesses, MBEs, WBEs, and labor surplus area businesses participate in [Agency] contracting.

(b) Section 15.5.B, Goals. [The Agency] is encouraged to establish goals by which they can measure the effectiveness of their efforts in implementing programs in support of contracting with disadvantaged firms. It is important to ensure that the means used to establish these goals do not have the effect of limiting competition and should not be used as mandatory set-aside or quota, except as may otherwise be expressly authorized in regulation or statute. Some localities have adopted minority contracting set-aside policies or geographic limitations, which may be in conflict with Federal requirements for full and open competition.

Within the COUNTY HOUSING Procurement Policy, it states the following:

Assistance to Small and Other Business, Required Efforts:

Consistent with Presidential Executive Orders 11625, 12138, and 12432, and Section 3 of the HUD Act of 1968, all reasonable efforts will be made to ensure that COUNTY HOUSING contracts with small businesses, minority business enterprises (MBE), women’s business enterprises (WBE), and businesses located in or owned in substantial part by persons residing in COUNTY HOUSING projects when possible. Such efforts will include, but will not be limited to:

- (1) Including such firms, when qualified, on solicitation mailing lists.
- (2) Encouraging participation through direct solicitation of bids or proposals whenever they are potential contractors.
- (3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by such businesses.
- (4) Establishing delivery schedules, where the requirements permit, to encourage participation by such businesses.
- (5) Using the services and assistance of the Small Business Administration and the Minority Business Development Agency of the Department of Commerce.
- (6) Including in contracts, to the greatest extent feasible, a clause requiring contractors to provide opportunities for training and employment for lower income residents of the project area and to award subcontracts for work in connection with the project to businesses providing opportunities to low-income residents.
- (7) Requiring prime contractors, when subcontracting is anticipated, to take the actions listed above.

Requirements. Accordingly, please see Tab7 within Table No. 1 herein which details the information pertaining to this issue that the proposer must submit in response to this proposal showing compliance, to the greatest extent feasible, with these regulations.

Pre-proposal Conference. There is not a pre-proposal conference scheduled as a part of this RFP.

10. Evaluation Factors

Proposals will be evaluated using the following scoring system.

Category	Points
LIHTC experience	22
LIHTC success rate	23
Missouri / MHDC experience	20
Qualifications of staff	12
Approach to services	11
Fee structure	12
Base Total	100
Development partner experience (Optional Bonus 15)	15
Maximum Possible Score	115

Note: *Proposals will be evaluated on a base score of 100 points. An additional 15 points may be awarded for demonstrated Development Partner Experience, resulting in a maximum possible score of 115 points. Proposers without this experience will be evaluated out of 100 points.*

County Housing may conduct interviews with top-ranked firms.

10.1 Shortlisted Firm Presentations

Following initial evaluation of written proposals, County Housing may invite shortlisted respondents to participate in an in-person or virtual presentation.

The purpose of the presentation is to evaluate the respondent's ability to structure a competitive application under the current Qualified Allocation Plan administered by the Missouri Housing Development Commission.

10.2 Presentation Format

Shortlisted firms will be asked to deliver a 30-minute presentation followed by 15 minutes of questions from the evaluation panel.

10.3 Required Topics

Presentations must address:

- The respondent's strategy for winning competitive 9% LIHTC allocations in Missouri.
- Key scoring categories under the current MHDC Qualified Allocation Plan.
- Approaches to maximizing points in areas such as:
 - Priority group eligibility
 - Deep income targeting
 - Leveraged funding
 - Development characteristics
- Examples of successful LIHTC applications the firm has prepared.
- Identification of common pitfalls that lead to rejected applications.
- How the firm would approach a potential development project for County Housing.

10.4 Evaluation of Presentations

Presentations will be scored based on:

Category	Points
Demonstrated knowledge of MHDC QAP	10
Strategic thinking	5
Ability to clearly communicate development strategy	5

Maximum Presentation Score: 20 points

Presentation scores may be added to the original proposal evaluation score.

10.6 Evaluation Method. The eventual award will occur based on the following detailed brief procedures.

Each proposal received will first be evaluated for responsiveness (i.e., meets the minimum of the requirements).

Evaluation Packet. An evaluation packet will be prepared for each evaluator, typically including the following documents:

- Instructions to Evaluators
- Proposal Tabulation Form
- Written Narrative Form for each proposer

- Recap of each proposer's responsiveness
- Copy of all pertinent RFP documents

Evaluation Committee. COUNTY HOUSING anticipates that it will select a minimum of a three-person committee to evaluate each of the responsive "hard copy" proposals submitted in response to this RFP. PLEASE NOTE: No proposer shall be informed at any time during or after the RFP process as to the identity of any evaluation committee member. If, by chance, a proposer does become aware of the identity of such person(s), he/she SHALL NOT make any attempt to contact or discuss with such person anything related to this RFP. The Planning and Procurement Officer is the only person at COUNTY HOUSING that the proposers shall contact pertaining to this RFP. Failure to abide by this requirement may (and most likely will) cause such proposer(s) to be eliminated from consideration for award.

The Planning and Procurement Officer will evaluate and award points pertaining to Evaluation Factors No. 1 (the "Objective" Factor). The appointed evaluation committee, independent of the Planning and Procurement Officer or any other person at COUNTY HOUSING, shall evaluate the responsive proposals submitted and award points pertaining to Evaluation Factors No. 2 through No. 6 (the "Subjective" Factors). Upon final completion of the proposal evaluation process, the evaluation committee will forward the completed evaluations to the Planning and Procurement Officer.

Points Awarded Range. Pertaining to the Subjective Factors, please note the following range of points awarded (points pertaining to this RFP are shaded—please also see the Evaluation Factors detailed within the preceding section:

Classification*	Points Awarded Range					
	Rating	%	10	20	30	100**
Acceptable	Excellent	95%/+	10	19-20	29-30	95-100
Acceptable	Very Good	90%/+	9	18	28	90-94
Potentially Acceptable	Good	80%/+	8	16-17	26-27	80-89
Potentially Acceptable	Average	70%/+	7	14-15	24-25	70-79
Unacceptable	Poor	<70%	0-6	0-13	0-23	0-69
*Pursuant to Section 7.2.N.3 of HUD Procurement Handbook 7460.8 REV 2.						
**Total available points to be awarded, including cost points, minus preference points.						

Table 4 – Points Award Range

Potential "Competitive Range" or "Best and Finals" Negotiations. COUNTY HOUSING reserves the right to, as detailed within Section 7.2.N through Section 7.2.R of HUD Procurement Handbook 7460.8 REV 2, conduct a "Best and Finals" Negotiation, which may include oral interviews, with all firms deemed to be in the competitive range. Any firm deemed not to be in the competitive range shall be notified of such in writing by the Agency in as timely a manner as possible, but in any case within no longer than 10 days after the beginning of such negotiations with the firms deemed to be in the competitive range.

Determination of Top-ranked Proposer. Typically, the subjective points awarded by the evaluation committee will be combined with the objective points awarded. If the evaluation was performed to the satisfaction of the Executive Director, the final rankings may be forwarded to the Housing County Housing Board of Commissioners at a scheduled meeting for approval. Contract negotiations may, at COUNTY HOUSING's option, be conducted prior to or after the Board of Commissioners approval.

- **Minimum Evaluation Results.** To be considered to receive an award a proposer must receive a total calculated average of at least 70 points (of the 100 total points detailed herein).
- **Ties.** In the case of a tie in points awarded, the award shall be decided as detailed within Section 6.12.C of HUD Procurement Handbook 7460.8 REV 2, by “drawing lots or other random means of selection.”

Notice of Results of Evaluation. If an award is completed, all proposers will receive by e-mail a Notice of Results of Evaluation. Such notice shall inform all proposers of:

- (a) Which proposer received the award.
- (b) Where each proposer placed in the process as a result of the evaluation of the proposals received.
- (c) The cost or financial offers received from each proposer.
- (d) Each proposer’s right to a debriefing and to protest.

Restrictions: All persons having familial (including in-laws) and/or employment relationships (past or current) with principals and/or employees of a proposer entity will be excluded from participation on the Agency evaluation committee. Similarly, all persons having ownership interest in and/or contract with a proposer entity will be excluded from participation on the Agency evaluation committee.

Selection and Contracting

County Housing may:

- Select multiple firms in each consultant pool
- Assign firms to projects through Task Orders
- Negotiate scope and compensation

Selection does not guarantee work.

Development Partner Engagement and Deal Structure

Development Partner Selection for Projects

County Housing may select Development Partners from the prequalified pool using one or more of the following methods:

- Direct selection based on qualifications and experience
- Project-specific requests for proposals (mini-RFPs)
- Interviews or competitive presentations

Form of Relationship

Development Partners may be engaged through:

- Co-development agreements
- Joint venture or partnership agreements
- Master development agreements

The specific structure will depend on the project.

Ownership and Control

County Housing intends to maintain a significant ownership interest and/or long-term control in projects it undertakes. The exact ownership structure will be determined on a project-by-project basis.

Roles and Responsibilities

County Housing and the Development Partner will negotiate and define:

- Division of development responsibilities
- Decision-making authority
- Financial contributions (if any)
- Developer fee allocation

Risk Allocation

Development Partners should be prepared to assume appropriate development risks, which may include:

- Construction completion risk
- Operating deficit risk
- Tax credit delivery risk

Final risk allocation will be negotiated in project-specific agreements.

11. Contract Award

Contract Award Procedure. If a contract is awarded pursuant to this RFP, the following detailed procedures will be followed:

- (a) By completing, executing, and submitting a proposal, the “proposer is thereby agreeing to abide by all terms and conditions pertaining to this RFP as issued by COUNTY HOUSING, either in hard copy or electronically, including the contract clauses already attached as Attachments F and F-1 through F-3, each attached hereto. Accordingly, COUNTY HOUSING has no responsibility to conduct after the submittal deadline any negotiations pertaining to the contract clauses already published.

Contract Conditions. The following provisions are considered mandatory conditions of any contract award made by COUNTY HOUSING pursuant to this RFP:

- (a) Contract Form. COUNTY HOUSING will not execute a contract on the Contractor’s form—contracts will only be executed on COUNTY HOUSING form (please see Sample Contract, Attachments F and F-1 through F-3 each attached hereto), and by submitting a proposal the Contractor agrees to do so (please note that COUNTY HOUSING reserves the right to amend this form as COUNTY HOUSING deems necessary). However, COUNTY HOUSING will during the RFP process (prior to the posted question deadline) consider any contract clauses that the proposer wishes to include therein and submits in writing a request for the Agency to do so; but the failure of the Agency to include such clauses does not give the Contractor the right to refuse to execute COUNTY HOUSING’s contract form. It is the responsibility of each prospective proposer to notify COUNTY HOUSING, in writing, prior to submitting a proposal, of any contract clause that he/she is not willing to include

in the final executed contract and abide by. COUNTY HOUSING will consider and respond to such written correspondence, and if the prospective proposer is not willing to abide by COUNTY HOUSING's response (decision), then that prospective proposer shall be deemed ineligible to submit a proposal.

- (b) **Mandatory HUD Forms.** Please note that COUNTY HOUSING has no legal right or ability to (and will not) at any time negotiate any clauses contained within ANY of the HUD forms included as a part of this RFP.
- (c) **Assignment of Personnel.** COUNTY HOUSING shall retain the right to demand and receive a change in personnel assigned to the work if COUNTY HOUSING believes that such change is in the best interest of COUNTY HOUSING and the completion of the contracted work.
- (d) **Unauthorized Sub-contracting Prohibited.** The Contractor shall not assign any right, nor delegate any duty for the work proposed pursuant to this RFP (including, but not limited to, selling or transferring the contract) without the prior written consent of the Planning and Procurement Officer. Any purported assignment of interest or delegation of duty, without the prior written consent of the Planning and Procurement Officer shall be void and may result in the cancellation of the contract with COUNTY HOUSING or may result in the full or partial forfeiture of funds paid to the Contractor because of the proposed contract; either as determined by the Planning and Procurement Officer.

Contract Period. COUNTY HOUSING anticipates a multi-year contract.

Licensing and Insurance Requirements. Prior to award (but not as a part of the proposal submission) the *Contractor* will be required to provide:

- (a) **Workers Compensation Insurance.** An original certificate evidencing the proposer's current industrial (worker's compensation) insurance carrier and coverage amount (NOTE: Workers Compensation Insurance will be required of any Contractor that has employees other than just the owner working on-site to provide the services).
- (b) **General Liability Insurance.** An original certificate evidencing General Liability coverage, naming the Agency as an additional insured, together with the appropriate endorsement to said policy reflecting the addition of the Agency as an additional insured under said policy (minimum of \$1,000,000 each occurrence, general aggregate minimum limit of \$1,000,000, together with damage to premises and fire damage of \$50,000 and medical expenses any one person of \$5,000), with a commercially reasonable deductible (i.e., "commercially reasonable," meaning not greater than 1% of the "general aggregate minimum" of the policy, with a maximum deductible amount of \$50,000).
- (c) **Professional Liability Insurance.** An original certificate showing the proposer's professional liability and/or "errors and omissions" coverage (minimum of \$1,000,000 each occurrence, general aggregate minimum limit of \$1,000,000), with a commercially reasonable deductible (i.e., "commercially reasonable," meaning not greater than 1% of the "general aggregate minimum" of the policy, with a maximum deductible amount of \$50,000)
- (d) **Automobile Insurance.** An original certificate showing the proposer's automobile insurance coverage in a combined single limit of \$1,000,000. For every vehicle utilized

during the term of this program, when not owned by the entity, each vehicle must have evidence of automobile insurance coverage with limits of no less than \$100,000/\$300,000 and medical pay of \$5,000.

- (e) City/County/State Business License.** If applicable, a copy of the proposer's business license allowing that entity to provide such services within the City of Saint Louis, Saint Louis County, and/or the State of Missouri.
- (f) Certificates/Profile of Firm Form.** Pertaining to the aforementioned insurance certificates and licenses, each proposer is required to enter related information on the Profile of Firm Form (do not attach or submit copies of the insurance certificates or licenses within the proposal submittal—we will garner the necessary documents from the successful proposer prior to contract execution).

Note:

The COUNTY HOUSING will be named as an Additional Insured under the successful bidder's Comprehensive General Liability Policy, but only to the extent that COUNTY HOUSING is not protected by sovereign immunity under Missouri law. The Policy's Additional Insured provision must include the following language: "The inclusion of the COUNTY HOUSING as an Additional Insured under this Policy is not intended to act as, and does not constitute, a waiver of its sovereign immunity under Missouri law, or as a waiver of any related defense. This Policy provides the COUNTY HOUSING with no coverage for any potential liability or in any suit for damages that would be barred against it by the doctrine of sovereign immunity in the absence of this Policy." The Policy will also include a waiver of subrogation in favor of the COUNTY HOUSING.

The Contractor shall be required to raise the limits of liability on a per occurrence basis, to match the revised statutory limit of the liability for public entities, during the term of this contract.

Right to Negotiate Final Fees. COUNTY HOUSING shall retain the right to negotiate the amount of fees that are paid to the Contractor, meaning the fees proposed by the top-rated proposer may, at COUNTY HOUSING's options, be the basis for the beginning of negotiations. Such negotiations shall begin after COUNTY HOUSING has chosen a top-rated proposer. Pertaining to these negotiations, please see the preceding Section herein.

Contract Service Standards. All work performed pursuant to this RFP must conform and comply with all applicable local, state, and federal codes, statutes, laws, and regulations.

Prompt Return of Contract Documents. All documents required to complete the contract, including contract signature by the successful proposers, shall be provided to COUNTY HOUSING within 10 workdays of notification by COUNTY HOUSING.

12. Procurement Compliance

All work must comply with applicable federal, state, and local regulations including those administered by the U.S. Department of Housing and Urban Development including:

- Fair Housing requirements
- Equal opportunity provisions
- Section 3 requirements

13. Mandatory Forms/Contract Provisions

The following table contains a list of attachments and mandatory forms that must be returned with

your proposal response.

Description
Attachment A (Form of Proposal) (Must be returned with proposal)
Attachment B (HUD 5369-B)
Attachment C (HUD 5369-C) (Must be returned with proposal)
Attachment D (Profile of Firm Form) (Must be returned with proposal)
Attachment E (Section 3 Explanation)
Attachment F Sample Contract
Attachment F-1 (HUD 5370-C)
Attachment F-2 (HUD 50071)
Attachment F-3 (SF-LLL)
Attachment G Proposal Calendar
Attachment H Supplemental Instructions to Proposers & Contractors (SIPC)
Attachment I (Fee Structure)
Attachment J (LIHTC Experience and Track Record Form)
Attachment K (LIHTC Development Team Disclosure Form)
Attachment L (Sample Task Order)

Table 5 – List of Attachment