

DOWNTOWN WINSTON-SALEM PARTNERSHIP, Inc.



REQUEST FOR PROPOSALS (RFP)

Project Title:

Downtown Winston-Salem Housing Demand Study

Date of Issue: October 5, 2016

Contact Information

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President

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1. OVERVIEW

The Downtown Winston-Salem Partnership (DWSP) is soliciting proposals from qualified firms, groups of firms, or individuals (the “Consultant”) to provide a residential feasibility study for the Central Business District of Downtown Winston-Salem (“Downtown”). The consultant will be chosen based upon the highest value to the DWSP as outlined in the Selection Criteria in this RFP and the consultant’s demonstrated value in helping to meet the community’s goal of creating more density in Downtown.

Proposals must be prepared and submitted in accordance with the requirements, format, and guidelines presented in this Request for Proposal.

The resulting contract will be coordinated and managed by Jason Thiel, president of the DWSP which is a 501(c) (6) nonprofit organization dedicated to promoting a dynamic revitalization plan for downtown Winston-Salem that will benefit the entire community.

More information on the DWSP can be found at www.downtownws.com

2. BACKGROUND

The DWSP desires to increase residential density in downtown Winston-Salem. Currently there are over 3,200 residential units in downtown Winston-Salem including the historic neighborhoods of Holly Avenue and West End. A table of the existing and proposed housing units is included in this RFP as Exhibit 1.

3. PROJECT TASKS

The successful consultant is expected to carry out the following general tasks:

- Analyze real estate acquisition and development within Downtown.
- Provide an inventory of available development sites.
- Assess market feasibility for downtown housing.
- Provide an implementation plan for the DWSP for the development of housing units of all types.

The winning proposal will provide specifics regarding how the consultant plans to carry out the tasks, which will be a critical element in consultant selection. In addition, the winning proposal will demonstrate the consultant’s creativity and knowledge and outline the consultant’s experience with similar projects. See Proposal Content and Selection Criteria sections for complete requirements.

4. PROJECT DELIVERABLES

The consultant will assemble the components into a final document or documents and at a Minimum, provide The DWSP with five paper copies of the deliverables as well as an electronic version in a quality resolution PDF format. After the delivery of the written product, the consultant will conduct a Power Point presentation of the findings to a group to be determined.

Related to the tasks above, the DWSP expects that the consultant will be able to provide the following information as part of the deliverables:

- An assessment of Downtown's current housing market.
- An assessment of the demand for residential housing in the identified area, broken down by type: multi-family, single-family, condo, etc.
- The anticipated price points for each type of housing identified.
- An assessment of the appropriate mix of residential housing to be considered for the area.
- An estimate of the demand for rental and owner-occupied units based on income.
- The period of time over which housing demand is anticipated to exist or occur.
- An identification of target markets for the housing demand anticipated and their Demographics.
- Recommendations concerning the approaches that might be taken to satisfy the identified housing needs.
- Identification of current and future housing gaps.
- Recommendations for addressing gaps and meeting housing needs.
- Identification of barriers to downtown housing from both the developer and end user point of view.

5. PROPOSAL CONTENT

Proposals should provide a straightforward, concise description of the proposed work to be done and the consultant's ability to meet the requirements of this RFP.

An officer of the consultant or a designated agent empowered to bind the consultant in a Contract shall sign the proposal and any clarifications to that proposal.

The proposal shall contain the following in the order described:

I. Cover Letter

Each submission should be accompanied by a cover letter, which includes:

1. The consultant's name and address.
2. A clearly identified point of contact for the consultant, including name, title, telephone number, and email address.
3. A statement that the proposal is in response to this RFP.

II. Work Plan

The proposal shall include a detailed work plan that also demonstrates the Consultant's understanding of the project and the proposed scope of services. This Shall include, but is not limited to, the following:

- Description of tasks, activities, and/or procedures, and the approach to be Undertaken by the consultant for each.
- Description of any deliverables to be provided as an outcome of each task.
- Data updates or information that would be required for each task. Specific Note should be made of any data, information, or other resources that the

Consultant anticipates will be needed from the DWSP for the Successful completion of the project.

- Any issues or problems expected to be encountered and an approach for Resolving them.
- Schedule for consulting the DWSP staff during the project and Keeping the DWSP informed on the progress of the work.

III. Schedule of Project Activities

- The consultant shall provide a schedule for the work tasks and deliverables.
- The DWSP wishes for the project to be completed no later than 6 weeks after the project is awarded.

IV. Preliminary Budget

Budget information should be provided in an exact lump sum not to exceed cost.

V. Statement of Consultant Qualifications

The consultant selected is expected to have recently (within the last two years) been Engaged in a similar assignment, have specific personnel experienced in similar Projects assigned to the project, and have demonstrated the ability to work well with Local entities and agencies. The following consultant information shall be included With the proposal:

- The principal in charge of this project with current contact information.
- A list of, and a detailed resume for, each professional or technical person Assigned to the project which includes experience or expertise that qualifies the person for this project.
- A summary of similar projects prepared by the personnel assigned to this Project. Include contact information for the principal user for these projects.
- At least three references with contact information regarding recent relevant work. The consultant should specify its role in each of these projects.

6. SELECTION CRITERIA

The DWSP reserves the right to choose any vendor for this service, regardless of the bidding price or the criteria described below. Additionally, the DWSP is at liberty to refuse any and all vendors who submit proposals. The DWSP will review all proposals for completeness; any that are incomplete may be eliminated. In selecting a vendor, the DWSP will weigh many factors in the selection process, including the following:

1. Methodology proposed, including timetable of work.
2. Additional information the consultant provides that brings value to the analysis.
3. Successful work experience with similar projects demonstrating that the consultant can perform the services described in the Project Tasks section.
4. References. The consultant shall have completed at least two similar engagements during the past two years, and provide references pertaining to these engagements.
5. Experience of firm, including resumes of staff who will be assigned to this project.
6. Project cost.
7. M/WBE Program participation.

7. SUBMISSION DEADLINE

Submission of a proposal to The DWSP indicates the consultant's ability to meet the requirements of this RFP. All proposals shall be submitted by 5:00 p.m. Eastern Standard Time on Wednesday, October 26, 2016 by email to the contact below:

Jason Thiel
Downtown Winston-Salem Partnership, Inc.
(336) 354-1500
jason@dwsp.org

It is the consultant's responsibility to ensure that the DWSP has received the proposal. Confirmation of receipt will be sent by email to the consultant when the proposal is received.

No changes will be accepted after 5:00 pm Eastern Standard Time October 26, 2016.

8. CONDITIONS

I. Limit on Claims

No proposer will have any claims or rights against the DWSP for participating in the RFP process, including without limitation submitting an RFP. The only rights and claims any Proposer will have against the DWSP arising out of participating in the RFP process will be specified in the contract with the selected proposer.

II. Questions

In an effort to ensure that all potential respondents to this proposal have access to the same information, all questions should be posed via email to Jason Thiel at the following email address:
jason@dwsp.org

Questions and appropriate responses will be distributed via email to all responding firms.

Questions will be accepted until **noon on Wednesday, October 19, 2016.**

III. Discretion of the DWSP

The DWSP reserves the right to reject any and all RFPs. NOTWITHSTANDING anything to the contrary in this document or in any addenda to this document, unless the condition refers specifically to this provision, the DWSP reserves the right (i) to negotiate changes of any nature with any firm proposing to do the work with respect to any term, condition, or provision in this document and/or in any RFP, whether or not something is stated to be mandatory and whether or not it is said that an RFP will be rejected if certain information or documentation is not submitted with it, and (ii) to enter into an agreement

for the work with one or more firms that do not submit an RFP. For example, all deadlines are for the administrative convenience or needs of the DWSP and may be waived by the DWSP at its discretion.

IV. Compensation

Compensation will be negotiated with the successful Proposer(s).

V. Americans with Disabilities Act

The successful bidder must comply with the provisions of the Americans with Disabilities Act (ADA) and all rules and regulations promulgated thereunder. By submitting a proposal, the successful bidder agrees to indemnify the DWSP from and against all claims, suits, damages, costs, losses, and expenses in any manner arising out of or connected with the failure of the contractor, its subcontractors, agents, successors, assigns, officers, or employees to comply with the provisions of the ADA or the rules and regulations promulgated thereunder.

VI. Exceptions

Any and all exceptions to the RFP must be listed on an item-by-item basis and cross-referenced with the RFP document. If there are no exceptions, the proposer must expressly state that no exceptions are taken.

If your firm wishes to submit a proposal that does not comply with the standards as discussed above, it is recommended that you also submit one that does comply so that your noncompliant version can be considered as an alternative if the DWSP is interested in it. This will allow your firm's compliant version to be considered if the DWSP remains steadfast in applying the standards discussed above.

VII. Non-Collusion

This RFP constitutes an invitation to bid or propose. Include and sign the following with your response:

The DWSP prohibits collusion, which is defined as a secret agreement for a deceitful or fraudulent purpose.

I, _____, affirm that I have not engaged in collusion with any DWSP employee(s), other person, corporations, or firms relating to this bid, RFP, or quotation. I understand collusive bidding is a violation of state and federal law and can result in fines, prison sentences, and civil damage awards.

Signature: _____

AFFIDAVIT A

MINORITY PARTICIPATION/GOOD FAITH EFFORTS

Scope of work: _____

A 10% goal for participation by minority/women owned businesses has been established on this proposal. A proposer may meet this goal through the participation of M/WBE sub-consultants and/or through his own performance on the project if the proposer is a minority/woman owned firm. Please list below all M/WBE firms to be used on this proposal.

Affidavit of _____
(Name of Proposer)

I hereby do certify that this documentation is a true and accurate representation of my M/WBE participation and my good faith efforts. (Attach additional sheets if required).

Minority Firm Name	Phone Number	Minority Category*	Type of Work	Percent of Project Work

* Minority Categories: Black, African American (B), Hispanic (H), Asian American (AA), American Indian (AI), Female (WF), Socially and Economically Disadvantaged (SE), and Disabled (D).

If the established 10% goal for participation by minority/women owned businesses is not achieved, the proposer must provide, with the proposal, the following documentation to the owner of his good faith efforts to meet the goals set forth in these provisions.

Examples of documentation include, but are not limited to, the following evidence:

✓	Description	Points	Awarded Points
_____	(a) Did your firm advertise in general circulation, professional association, or minority focus media concerning subcontracting opportunities? NOTE: A consultant must advertise in all three media to receive full value for this item.	15	_____
_____	(b) Did your firm provide written notice to a reasonable number of specific M/WBE firms that their interest in the contract was being solicited, at least 10 days before proposals were due to allow	15	_____

	M/WBE firms time to participate? Please provide a copy of the solicitations sent to at least three minority firms from the source list provided by the owner for each subcontract to be let under this contract (if three or more firms are shown on the source list). Each solicitation shall include a specific description of the work to be subcontracted, location where the RFP can be reviewed, and name of representative of the lead consultant.		
_____	(c) Did you follow up initial solicitation of interest by contacting M/WBE firms to determine with certainty whether the M/WBE firms were interested? Please include telephone log of follow-up calls you made to confirm interest.	10	_____
_____	(d) How did your company identify and select portions of the work to be performed by M/WBE firms in order to increase the likelihood of M/WBE participation? Please provide a copy of documentation where this information was included.	15	_____
	(e) What services were used from the City of Winston-Salem's M/WBE office; available minority community organizations; minority contractors' groups; local, state, and federal minority business assistance offices; and other organizations that provide assistance in the recruitment and placement of M/WBE firms? Please provide a copy of this documentation. Note: A proposer must utilize at least two agencies to receive full value.	10	_____
_____	(f) Did your company negotiate a joint venture or partnership arrangement with minority firms to increase opportunities for minority participation when possible? Please provide copy of any documentation (could be included in solicitation letter) advising M/WBE firms what type of assistance was available or outlining any other steps taken to fulfill this requirement.	10	_____
_____	(g) Did your company provide quick pay agreements and policies to enable minority contractors and suppliers to meet cash flow demands? What procedures were initiated to fulfill this requirement and how were the M/WBE firms informed of this assistance? Note: A proposer can receive up to 5 points for offering; 10 points for implementation.	15	_____
Total Points		90	=====

NOTE: A proposer must accumulate at least **55 points** to demonstrate a **good faith effort** was made. Partial points may be awarded when the complete requirement of an item is not met.

AFFIDAVIT A

GOOD FAITH EFFORTS (continued)

Date: _____ Name of Officer: _____

Signature: _____

Title: _____

State of North Carolina, County of _____ subscribes and sworn before me

This _____ day of _____, 20____

Notary Public _____ My commission expires _____

SEAL

AFFIDAVIT B

INTENT TO PERFORM CONTRACT WITH OWN WORK FORCE

County of _____

Affidavit of _____
(Name of Firm)

I hereby certify it is our intent to perform 100% of the work required for the contract:

(Name of Project)

In making this certification, the proposer states:

- That the proposer does not customarily subcontract elements of this type of project;
- Normally performs, has the capability to perform, and will perform all elements of the work on this project with his/her own current work force; and,
- Agrees to provide any additional information or documentation requested by the DWSP in support of the above statement.

The undersigned hereby certifies that he or she has read this certification and is authorized to bind the proposer to the commitments herein contained.

Date: _____ Name of Officer: _____

Signature: _____

Title: _____

State of North Carolina, County of _____ subscribed and sworn before me

This _____ day of _____, 20____

Notary Public _____ my commission expires _____

SEAL

In the event the proposer does not self-perform 100% of the work, the contract will be subject to the M/WBE goals originally established for this project, as well as good faith efforts and documentation requirements of this program.

EXHIBIT 1: Downtown Housing Units - Existing and Proposed

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	<u>Developer</u>	<u>For Sale</u>	<u>For Rent</u>	<u>Total</u>	<u>Yr Built</u>	<u>Status</u>	<u>Cumulative Total</u>
West End Neighborhood	Various			566		Built	566
Holly Avenue Neighborhood	Various			200		Built	766
405 & 415 N. Spring St.	Various		18	18	1927	Built	784
Gray Court Apartments	Ruth Chilton		53	53	1955	Built	837
Crystal Towers	Housing Authority of W-S		201	201	1972	Built	1038
315 Spruce Street (YMCA)	Aderon	30		30	1983	Built	1068
811 W. 5th Street	NA	15		15	1985	Built	1083
Tanner's Park	Beau Dancy	86		86	1996	Built	1169
Albert Hall	JDL Castle Corp.	15		15	1998	Built	1184
851 W. 4th St	JDL Castle Corp.	14		14	2000	Built	1198
Piedmont Leaf Lofts Phase 1	The Landmark Group		14	14	2001	Built	1212
One West Fifth Street	The Chapman Company	30		30	2003	Built	1242
The Mill at Tar Branch	Beau Dancy	30		30	2003	Built	1272
T-Square Apartments	Mike Coe		4	4	2003	Built	1276
Goler Townhomes	Goler CDC	4		4	2004	Built	1280
Nissen Building	Historic Restoration, Inc.		145	145	2005	Built	1425
Tar Branch Towers	Beau Dancy	27		27	2006	Built	1452
Piedmont Leaf Lofts Phase 2	The Landmark Group	33		33	2006	Built	1485
Holly Village	O'Henry Builders	6		6	2006	Built	1491
Trader's Row	Chapman Company	16		16	2007	Built	1507
Holly Ridge	Court B Properties	9		9	2007	Built	1516
West End Village Phase 1	Fowler Investment Co.	72		72	2008	Built	1588
Goler Manor	Goler CDC		79	79	2008	Built	1667
Artists On Liberty (AOL) Apartments	Mike Coe		10	10	2008	Built	1677
One Park Vista	One Park Vista, LLC	32		32	2009	Built	1709
The Summit at Gateway	D.L. Davis Co.	26		26	2009	Built	1735
Marshall Street Brownstones	Beau Dancy	8		8	2009	Built	1743
Eight Thirty Six Oak	Tobacco Square LLC		30	30	2009	Built	1773
The Gallery Loft Apartments	Landex Corp./ Goler CDC		82	82	2009	Built	1855
Winston Factory Lofts (BRD)	Clachan Properties		85	85	2009	Built	1940
Salem Place Townhomes (Phase I & II)	Mellon Properties	24		24	2009	Built	1964
Salem Place Townhomes (Phase III)	Mellon Properties	14		14	2011	Built	1978
Hilltop House Phase 1	Bud Baker		56	56	2011	Built	2034
Hilltop House Phase 2	Bud Baker		54	54	2012	Built	2088
Hilltop House Phase 3	Bud Baker		65	65	2014	Built	2153
116 S. Marshal	Home Real Estate		6	6	2012	Built	2159
Winston Factory Lofts - Phase 2	Clachan Properties		86	86	2014	Built	2245
The Village Apartments	Us Development		45	45	2014	Built	2290
Plant 64	Chris Harrison Properties		243	243	2014	Built	2533
The Link Brookstown	Samet		200	200	2014	Built	2733
County Courthouse	Clachan		57	57	2015	Built	2790
Mill 800	Ken Reiter		170	170	2016	Built	2960
Reynolds Building Residentces	PMC Properties		120	120	2016	Built	3080
Livery	Lisha Construction		27	27	2016	Built	3107
YWCA	Benton Investments	25		25	2017	Under Construction	3132
757 North	Goler CDC		105	105	2017	Under Construction	3237
Twin City Condos	GEMCAP	21		21	2017	Under Construction	3258
Grubb WFIQ	Grubb Properties		350	350	2017	Proposed	3587
Brand Baseball	Brand		313	313	2018	Proposed	3900
Built Holly Ave & West End	766			Total Proposed		663	
Built Other	2314				For Rent	663	
For Rent	1476	63.8%			For Sale	0	
For Sale	491	21.2%					
Built Since 2005	1852			Total Built & UC		3231	
For Rent	1665	89.9%					
For Sale	292	15.8%		Total Built, UC & Proposed		3894	
Under Construction (UC)	151						
For Rent	105	69.5%					
For Sale	46	43.8%					