



REQUEST FOR PROPOSAL (RFP)

DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION

RFP NUMBER

119037

RFP TITLE

**Affordable Rental Housing
Affordable Housing Development Fund**

RFP DEADLINE

**July 3, 2019
2:00 p.m. (CST)**

Late proposals, faxed proposals, electronic mail proposals or unsigned proposals will be rejected.

**SUBMIT PROPOSAL
TO THIS ADDRESS**

CITY COUNTY BUILDING
DANE COUNTY PURCHASING DIVISION
210 MARTIN LUTHER KING JR BLVD ROOM 425
MADISON, WI 53703-3345

**DIRECT
ALL INQUIRES TO**

NAME

**DIRECT
ALL INQUIRES TO
DATE ISSUED: May 15,
2019**

TITLE Megan Rogan

PHONE # Purchasing Agent

EMAIL 608-283-1487

WEB SITE rogan.megan@countyofdane.com

www.danepurchasing.com

PROPOSAL SUBMISSION CHECKLIST

of Proposals

Proposal Delivery

- ☐ (1) original
- ☐ (5) copies
- ☐ (1) electronic copy of your proposal and cost proposal in PDF format on a flash drive
- ☐ Cost proposal original and one copy in a separate envelope per Section 5.1.
- ☐ Up-to-date Vendor Registration

- ☐ Sealed envelope/package containing proposals and labeled with:
Vendor Name
Bid Number
Bid Deadline Date/Time

**PROPOSALS MUST BE DATE/TIME STAMPED BY A DANE COUNTY
DEPARTMENT OF ADMINISTRATION STAFF MEMBER**

Revised 10/2018

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1.0 GENERAL INFORMATION

1.1 Introduction

The purpose of this document is to provide interested parties with information to enable them to prepare and submit a proposal for financial assistance from the County's Affordable Housing Development Fund (AHDF).

The funding award resulting from this RFP will be administered by Dane County, Office of Economic and Workforce Development.

The contract administrator will be Dave Phillips, Director, Office of Economic & Workforce Development.

The Dane County Purchasing Division is the sole point of contact for questions and issues that may arise during the RFP process.

1.2 Clarification of the Specifications

All inquiries concerning this RFP must be directed to the **person indicated on the cover page** of the RFP Document. (Electronic mail is the preferred method)

Any questions concerning this RFP must be submitted in writing by mail, fax or e-mail on or before the stated date on the **Calendar of Events** (Section 1.5).

Proposers are expected to raise any questions, exceptions, or additions they have concerning the RFP document at this point in the RFP process. If a proposer discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this RFP, the proposer should immediately notify the contact person of such error and request modification or clarification of the RFP document.

Proposers are prohibited from communicating directly with any employee of Dane County, except as described herein. No County employee or representative other than those individuals listed as County contacts in this RFP is authorized to provide any information or respond to any question or inquiry concerning this RFP.

1.3 Reasonable Accommodations

The County will provide reasonable accommodations, including the provision of informational material in an alternative format, for qualified individuals with disabilities upon request. If you need accommodations at a proposal opening/vendor conference, contact the Purchasing Division at (608) 266-4131 (voice) or 608/266-4941 (TTY).

1.4 Addendums and/or Revisions

In the event that it becomes necessary to provide additional clarifying data or information, or to revise any part of this RFP, revisions/amendments and/or supplements will be posted on the Purchasing Division [website](#).

It shall be the responsibility of the proposers to regularly monitor the Purchasing Division web site for any such postings. Proposers must acknowledge the receipt/review of any addendum(s) at the bottom of the Vendor Information Page.

SECTION 1 – GENERAL INFORMATION

Each proposal shall stipulate that it is predicated upon the terms and conditions of this RFP and any supplements or revisions thereof.

1.5 **Calendar of Events**

Listed below are specific and estimated dates and times of actions related to this RFP. The actions with specific dates must be completed as indicated unless otherwise changed by the County. In the event that the County finds it necessary to change any of the specific dates and times in the calendar of events listed below, it will do so by issuing an addendum to this RFP and posting such addendum on the Dane County [website](#). There may or may not be a formal notification issued for changes in the estimated dates and times.

DATE	EVENT
May 15, 2019	RFP Issued
May 29, 2019	Last day to submit written inquiries (2:00 p.m. CST)
June 5, 2019	Addendums or supplements to the RFP posted on the Purchasing Division website
July 3, 2019	Proposals due (2:00 p.m. CST)

1.6 **Contract Term and Funding**

The timing of this RFP is designed to allow developers to seek affordable housing tax credits in the 2019-2020 funding cycle. Once awards are determined, the County will allocate the funding for each project for a period of one year. If the project does not successfully secure its primary sources of financing within one year of the award, the funds will lapse.

1.7 **Submittal Instructions**

Proposals must be received in by the County Purchasing Division by the specified time stated on the cover page. All proposals must be time-stamped in by the Purchasing Division by the stated time. Proposals not so stamped will not be accepted. Proposals received in response to this solicitation will not be returned to the proposers.

Dane County is not liable for any cost incurred by proposers in replying to this RFP.

All proposals must be packaged, sealed and show the following information on the outside of the package:

- ☐ Proposer's name and address
- ☐ Request for proposal title
- ☐ Request for proposal number
- ☐ Proposal due date

1.8 **Multiple Proposals**

Multiple proposals from a vendor will be permissible, however each proposal must conform fully to the requirements for proposal submission. Each such proposal must be separately submitted and labeled as Proposal #1, Proposal #2, etc.

1.9 **Required Copies**

Proposers must submit **an original and the required number of copies** of all materials required for acceptance as instructed on the cover page of the RFP.

All hard copies of the proposal must be on 8.5"x11" individually securely bound. **In addition, proposers must submit one complete electronic copy in Microsoft Word or PDF format saved on a Flash Drive.**

1.10 **Proposal Organization and Format**

Proposals should be organized to comply with the section numbers and names as shown in Section 4.0: Proposal Preparation Requirements.

1.11 **Proprietary Information**

All restrictions on the use of data contained within a proposal and all confidential information must be clearly stated on the Required Form – Attachment B “Designation of Confidential and Proprietary Information”. Proprietary information submitted in a proposal, or in response to the RFP, will be handled in accordance with the applicable Wisconsin State Statute(s).

To the extent permitted by law, it is the intention of Dane County to withhold the contents of the proposal from public view until such times as competitive or bargaining reasons no longer require non-disclosure, in the opinion of Dane County. At that time, all proposals will be available for review in accordance with the Wisconsin Open Records Law.

1.12 **Local Purchasing Ordinance**

Under County ordinances, a Local Vendor is defined as a supplier or provider of equipment, materials, supplies or services that has an established place of business within the County of Dane. An established place of business means a physical office, plant or other facility. A post office box address does not qualify a vendor as a Local Vendor.

County ordinance provides that a local vendor automatically receive five points toward the evaluation score.

Vendors located within the counties adjacent to Dane County (Columbia, Dodge, Green, Iowa, Jefferson, Rock, Sauk) automatically receive two points toward the evaluation score.

1.13 **Dane County Sustainability Principles**

On October 18, 2012, the Dane County Board of Supervisors adopted Resolution 103, 2012-2013 establishing the following sustainability principles for the county:

- Reduce and eventually eliminate Dane County government's contribution to fossil fuel dependence and to wasteful use of scarce metals and minerals;
- Reduce and eventually eliminate Dane County government's contribution to dependence upon persistent chemicals and wasteful use of synthetic substances;

SECTION 1 – GENERAL INFORMATION

- Reduce and eventually eliminate Dane County government's contribution to encroachment upon nature and harm to life-sustaining ecosystems (e.g., land, water, wildlife, forest, soil, ecosystems);
- Reduce and eventually eliminate Dane County government's contribution to conditions that undermine people's ability to meet their basic human needs.

1.14 **Fair Labor Practice Certification**

Dane County Ord. 25.09 (1) is as follows:

(28) BIDDER RESPONSIBILITY. (a) Any bid, application or proposal for any contract with the county, including public works contracts regulated under chapter 40, shall include a certification indicating whether the bidder has been found by the National Labor Relations Board (NLRB) or the Wisconsin Employment Relations Committee (WERC) to have violated any statute or regulation regarding labor standards or relations within the last seven years. The purchasing manager shall investigate any such finding and make a recommendation to the committee, which shall determine whether the conduct resulting in the finding affects the bidder's responsibility to perform the contract.

If you indicated that you have been found by the NLRB or WERC to have such a violation, you must include a copy of any relevant information regarding such violation with your proposal, bid or application.

Additional information can be found using the following links: www.nlrb.gov and <http://werc.wi.gov>.

2.0 PROPOSAL SELECTION AND AWARD PROCESS

2.1 Preliminary Evaluation

The proposals will first be reviewed to determine if requirements in Section 1 and Section 4 are met. Failure to meet mandatory requirements will result in the proposal being rejected. In the event that all vendors do not meet one or more of the mandatory requirements, the County reserves the right to continue the evaluation of the proposals and to select the proposal which most closely meets the requirements specified in this RFP.

2.2 Proposal Scoring

Accepted proposals will be reviewed by an evaluation team and scored against the stated criteria. This scoring will determine the ranking of vendors based upon their written proposals. If the team determines that it is in the best interest of the County to require oral presentations, the highest-ranking vendors will be invited to make such presentations. Those vendors that participate in the interview process will then be scored, and the final ranking will be made based upon those scores.

2.3 Oral Presentations/Interview

Top ranked selected proposers may be required to make oral interview presentations and/or site visits to supplement their proposals, if requested by the County. The County will make every reasonable attempt to schedule each presentation at a time and location that is agreeable to the proposer. Failure of a proposer to conduct a presentation to the County on the date scheduled may result in rejection of the vendor's proposal.

2.4 Evaluation Criteria

The proposals will be scored on a scale of 0-10 points on each criteria listed below. The points score for each criteria will be weighted according to the percentages listed below.

Proposal Requirements	Percent
Development Team Capabilities (Section 4.4)	TBD%
Project Description (Section 4.5)	TBD %
Location (Section 4.5.1)	TBD %
Solar Array (Section 4.5.2)	TBD %
Funding Leverage (Section 4.6)	TBD %
Tenant Selection (Section 4.7)	TBD %
Tenancy Addendum (Section 4.8)	TBD %
Housing First (Section 4.9)	TBD %
Supportive Services Plan (Section 4.10)	TBD %
TOTAL	100%

2.5 Right to Reject Proposals and Negotiate Contract Terms

The County reserves the right to reject any and all proposals and to negotiate the terms of the contract, including the award amount, with the selected proposer prior to entering into a contract. If contract negotiations cannot be concluded successfully with the highest scoring proposer, the County may negotiate a contract with the next highest scoring proposer.

2.6 Award Amount

All projects will be ranked as described in section 2.2. If the sources and uses for a project indicate that less than 40% of the developer fee has been deferred as a financing source, the amount requested will be reduced by the difference between the percentage of developer fee deferred and 40%.

For example: Assume the developer fee is \$1,000,000, and \$350,000, or 35% of the fee is deferred. Also assume the request for County funding is \$500,000. The actual award would be reduced by \$50,000 and the project would receive an award of \$450,000.

After all projects are ranked and the awards are adjusted for the 40% developer fee standard, the County will apply the adjusted awards in ranked order until the available funding is exhausted. If partial funding is available for the lowest ranking project, the County will contact that respondent regarding any available funding.

2.7 **Notification of Intent to Award**

As a courtesy, the County may send a notification of award memo to responding vendors at the time of the award.

3.0 **PROJECT OVERVIEW AND SCOPE OF SERVICES**

3.1 **Definitions and Links**

The following definitions and links are used throughout the RFP.

County: Dane County

County Agency: Department/Division utilizing the service or product.

Proposer/Vendor/Firm/Contractor: a company submitting a proposal in response to this RFP.

Dane County Purchasing website: www.danepurchasing.com

Fair Labor Practices websites: www.nlr.gov and <http://werc.wi.gov>

3.2 **Scope of Services/Specification Overview**

Summary

The 2019 County Capital Budget included \$6 million in the Affordable Housing Development Fund.

Project Financing

The proposal response must include a sources and uses statement that outlines the estimated project costs, including the proposed developer fee, and the proposed sources of funding including the primary mortgage, the estimated tax credit equity, other public or private grant sources, the amount requested from the County and the amount of the developer fee that is deferred.

Housing First

The RFP is designed to forward the goal of Housing First. Housing First is an approach that centers on providing homeless people with housing quickly and then providing services as needed. What differentiates a Housing First approach from other strategies is that there is an immediate and primary focus on helping individuals and families quickly access and sustain permanent housing. This approach has the benefit of being consistent with what most people experiencing homelessness want and seek help to achieve. Housing First programs share critical elements:

- A. There is a focus on helping individuals and families access and sustain rental housing *as quickly as possible and the housing is not time-limited*; A variety of services are delivered primarily following a housing placement to promote housing stability and individual well-being;
- B. Such services are time-limited or long-term depending upon individual need;
- C. Housing is not contingent on compliance with services – instead, participants must comply with a standard lease agreement and are provided with the services and supports that are necessary to help them do so successfully.

Targeted Populations

The RFP process is targeted to specific populations:

- A. Projects designed to serve the chronically homeless population, meaning those who are either: 1) an unaccompanied homeless individual with a disabling condition who has been continuously homeless for a year or more, or 2) an unaccompanied individual with a disabling condition who has had at least four episodes of homelessness in the past three years. Disabling conditions include mental illness and alcohol and drug addictions.
- B. Projects designed to serve the homeless veteran population.
- C. Very low-income families.
- D. Persons with arrest and conviction records.
- E. The elderly.
- F. Individuals with disabilities.

Types of Projects

This RFP is specifically dedicated to expanding the availability of housing units to serve the above populations through construction of new rental units. Below are other conditions/preferences the county seeks in RFP responses:

- A. Projects that meet the income, occupancy and rent restrictions of low income housing tax credits (LIHTC).
- B. Projects will have a long-term affordability requirement.
- C. Projects that include housing for households with income at or below 30% of County Median Income (CMI)
- D. Projects that are geographically located to maximize access to jobs, transit, schools and other key amenities.
- E. Projects that integrate supportive services in partnership with non-profit service providers.
- F. Projects that improve access to rental housing through generous tenant screening criteria.
- G. Projects that include 3 bedroom units.

Form of Funding and Support

The funds available through the AHDF are in the County's Capital Budget. State statutes limit, to some extent, the use and flexibility of these capital funds. For projects that are within the jurisdiction of the Dane County Housing Authority (DCHA), areas of the County outside the Cities of Madison and Stoughton and the Village of DeForest, the County can use its capital funds to make a grant to the DCHA which will then make a grant or loan to the project developer for capital costs, such as land acquisition and construction.

In areas outside the jurisdiction of the DCHA, the AHDF must be used by the County to purchase capital assets, such as land or a portion of a building, which can then be leased back to the project developer for project purposes.

4.0 PROPOSAL PREPARATION REQUIREMENTS

Proposals should be organized to comply with the section numbers and names as shown below. Each section heading should be separated by tabs or otherwise clearly marked. Hardcopies shall be bound in an 8½" x 11" format, but 11"x17" pages for graphics may be included. The RFP sections which should be submitted/responded to are:

4.1 Required Form – Attachment A – Vendor Information

4.2 Table of Contents

Provide a table of contents that, at a minimum, includes all of the sections as identified below. Listings of sub-sections and graphics/tables also may be included. Section dividers are encouraged.

4.3 Tab 1: Introduction

Provide a brief overview of the project team and the proposed development.

4.4 Tab 2: Development and Service Team Background

Provide a description of the organization including key staff who will be involved in the project, past projects the team has completed, and projects currently in process. Items that should be addressed include:

Development and Service Team Experience in:

1. Obtaining and utilizing Section 42 tax credits
2. Participating in public/private joint ventures
3. Developing multifamily housing for low-income households
4. Developing permanent supportive housing if applying for such project
5. Property management
6. Provision of support services if the project entails permanent supportive housing

4.5 Tab 3: Project Description

Provide a detailed description of the project proposed for county support. The description should indicate the planned location, number of and size of units, development costs, a pro forma showing projected operating costs and revenues, and the minimum amount of county funding necessary to complete the project.

If the project will have a mix of affordable and market rate units, the response should indicate how many of each size unit will be affordable and how many will be market rate. Responses should also indicate how the county funds will be applied to the project. Responses should also include details on how the balance of the project will be funded. Responses should indicate if, and the amount of, county funds that will be used to fund any gap in the financing necessary to complete the project or will be used to increase the number of affordable units.

Projects that include three bedroom units will receive higher consideration. Projects that include a longer affordability term will also receive higher consideration.

4.5.1 Project Location

Projects that are located outside the City of Madison will receive 10 points. Projects located within the City of Madison that are more than one-half mile of any point

indicated on the map shown as Attachment E will also receive 10 points. Project that are inside the City of Madison and are also within one-half mile of any point on the map will not receive location points. To facilitate this analysis, the points on the map are also listed in Attachment E. Respondents should indicate the parcel or parcel numbers of their project location as well as the address of the project.

4.5.2 Photo Voltaic Array

The County has a strong interest in advancing the application of renewable energy. Proposed projects that include a photovoltaic (PV) system will receive 10 points. Responses should include a description of the PV system to be installed, its estimated production capacity, and an estimate of the number of kilowatt hours of conventional electricity the system is expected to displace. The County will contribute up to \$50,000 toward the cost of the installation of a PV array to serve the building. The estimated cost of the system should be identified in the sources and uses statement described below in 4.8.

4.6 Tab 4: Project Financing and Leverage

The proposal must include a sources and uses statement that outlines the estimated project costs, including the proposed developer fee, and the proposed sources of funding including the primary mortgage, the estimated tax credit equity, other public or private grant sources, the amount requested from the County and the amount of the developer fee that is deferred. The sources and uses statement should state the cost of the PV system if one is contemplated for the project and the amount of county funding requested up to a maximum of \$50,000.

Responses should clearly indicate the amount of county funding requested compared to the total project costs, and describe the other sources of funds that will support the project. Responses should discuss how the county's contribution will enhance affordability of housing units. Responses will be evaluated such that the response with the lowest county cost per affordable unit bedroom will receive the highest points. The county will consider projects that apply 4% or 9% tax credits or other sources of funding support.

4.7 Tab 5: Fair Tenant Selection

See Attachment F. This attachment outlines specific tenant selection criteria and procedures. Respondents must indicate if they will agree to all of these elements. If a respondent agrees, then these elements will be included in final project documents. Those documents will provide for a \$500 fine for any violations of these elements. Respondents that agree to these terms will receive the 10 points under evaluation criteria for Tenant Selection.

Respondents not agreeing to the specified tenant selection criteria listed in the attachment should present their alternative tenant selection process that will be applied to the project. Respondents who do not agree to the terms in Attachment F will receive 0 points.

4.8 Tab 6: Tenancy Addendum

See Attachment G. This attachment outlines specific provisions of related to security deposits, late fees, termination of tenancy, parking and guest policies. Respondents

must indicate if they will agree to all of these elements. If a respondent agrees, then these elements will be included in final project documents. Those documents will provide for a \$500 fine for any violations of these elements. Respondents that agree to these terms will receive the 10 points under evaluation criteria for Tenant Selection. Respondents who do not agree to these terms will not receive those evaluation points.

4.9 **Tab 7: Housing First**

The Dane County Homeless Services Consortium (HSC) is comprised of a number of agencies and organizations working to end homelessness in Dane County. A number of agencies take client/tenant referrals for their housing programs from a community by-name list.

The community by-name list is managed by the Coordinate Entry Systems Manager of the Homeless Services Consortium of Dane County (HSC). The Coordinated Entry Systems Manager works with agencies to help select individuals from the by-name list for housing placement into available housing units. Individuals on the by-name list may have access to case management and some form of rental subsidy once enrolled in these programs.

Respondents should indicate their willingness to partner with the HSC and its housing placement system to end homelessness for individuals and/or families on the community by-name housing list.

To further the goal of housing first, projects that designate a minimum of 12% of their units to the Coordinate Entry Systems Manager of the Homeless Services Consortium of Dane County (HSC) for individuals or families receiving case management services on the Community-wide Priority List for Housing maintained by the HSC and having those units filled by the Coordinated Entry Systems Manager of the HSC, in consultation with the projects property manager will receive a minimum of 5 points. Projects with more than 12% of units set aside to be filled from the Community-wide Priority List will receive up to 10 points. Respondents should clearly indicate if they agree to set aside any units to be filled from the Community-wide Priority list. If not, respondents should include a discussion of how their proposed projects forwards the goal of housing first.

4.10 **Tab 8: Supportive Services Plan**

Provide a detailed description of how supportive services will be secured for the tenants of any property developed as part of this project. The description should detail:

1. The name of the supportive services partner(s), including any specific staff involved with the partnership and the number of staff from that partner agency dedicated to the partnership.
2. The scope of the services provided to tenants and what approaches the supportive services partner(s) will use to address the needs of the targeted tenant population.
3. Where tenants can access services. For example, on-site at the development in a permanent, designated space, or by referral to off-site community supports with no on-site provider presence.
4. If services provided are referral to off-site community supports, please detail how tenants will receive information on supportive services that are available to them before and after needs arise.

SECTION 5 – ATTACHMENTS

5. The frequency of services provided and/or a proposed schedule of when services are available to tenants.
6. How the supportive services partnership will be funded, including if the respondent is providing funding to support the partnership.
7. Relevant performance data that provides insight into the supportive service partner's experience serving the target tenant population, and the outcomes for their tenants. Metrics could include the number of individuals served in a related program in a year, housing retention rates for individuals served in that program, connections to employment, etc.
8. How the supportive services partner and the respondent will work together to ensure the best outcomes for tenants, such as housing retention.

5.0 REQUIRED FORMS – Must be submitted with RFP Response

5.0.1 Attachment A – Vendor Information

5.0.2 Attachment B – Designation of Confidential and Proprietary Information

5.0.3 Attachment C – Reference Data Sheet

5.1 ADDITIONAL ATTACHMENTS

5.1.1 Attachment D – Location Information

5.1.2 Attachment E – Fair Tenant Selection Criteria

5.1.3 Attachment F – Tenancy Addendum

SECTION 5 – REQUIRED FORMS – ATTACHMENT A

VENDOR INFORMATION

VENDOR NAME:

Vendor Information (address below will be used to confirm Local Vendor Preference)			
Address			
City		County	
State		Zip+4	
Vendor Rep. Name		Title	
Email		Telephone	
Dane County Vendor #			

Fair Labor Practice Certification (check only 1)	
<input type="checkbox"/>	Vendor has not been found by the National Labor Relations Board (“NLRB”) or the Wisconsin Employment Relations Commission (“WERC”) to have violated any statute or regulation regarding labor standards or relations in the seven years prior to the date this bid submission is signed.
<input type="checkbox"/>	Vendor has been found by the National Labor Relations Board (“NLRB”) or the Wisconsin Employment Relations Commission (“WERC”) to have violated any statute or regulation regarding labor standards or relations in the seven years prior to the date this bid submission is signed.

Local Vendor Purchasing Preference	
Are you claiming a local purchasing preference under DCO 25.08(7)?	<input type="checkbox"/> No <input type="checkbox"/> Yes (complete remainder of this section)
Preference as a Dane County Business:	<input type="checkbox"/> Dane
Preference as a business located in a county adjacent to Dane County:	<div style="display: flex; justify-content: space-between;"> <div> <input type="checkbox"/> Columbia <input type="checkbox"/> Green <input type="checkbox"/> Jefferson </div> <div> <input type="checkbox"/> Sauk <input type="checkbox"/> Dodge </div> <div> <input type="checkbox"/> Iowa <input type="checkbox"/> Rock </div> </div>

Cooperative Purchasing	
<input type="checkbox"/>	I <u>agree</u> to furnish the commodities or services of this bid to other municipalities.
<input type="checkbox"/>	I <u>do not agree</u> to furnish the commodities or services of this bid to other municipalities.

Addendums – this vendor hereby acknowledges receipt/review of the following addendums, if any.					
Addendum #1 <input type="checkbox"/>	Addendum #2 <input type="checkbox"/>	Addendum #3 <input type="checkbox"/>	Addendum #4 <input type="checkbox"/>	None <input type="checkbox"/>	

Signature Affidavit			
<p>In signing this bid, we certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a bid; that this bid has been independently arrived at without collusion with any other bidder, competitor or potential competitor; that this bid has not been knowingly disclosed prior to the opening of bids to any other bidder or competitor; that the above statement is accurate under penalty of perjury.</p> <p>The undersigned agrees to hold the County harmless for any damages arising out of the release of any material unless they are specifically identified on Attachment B. The undersigned, submitting this bid, hereby agrees with all the terms, conditions, and specifications required by the County in this Request for Bid, and declares that the attached bid and pricing are in conformity therewith.</p>			
Signature		Title	
Name (Printed)		Date	

DESIGNATION OF CONFIDENTIAL AND PROPRIETARY INFORMATION

The attached material submitted in response to this Proposal includes proprietary and confidential information which qualifies as a trade secret, as provided in Sect 19.36(5), Wisconsin State Statutes, or is otherwise material that can be kept confidential under the Wisconsin Open Records law. As such, we ask that certain pages, as indicated below, of this proposal response be treated as confidential material and not be released without our written approval. Attach additional sheets if needed.

Section	Page #	Topic

☐ **Proposer is not designating any information as proprietary and confidential which qualifies as trade secret.**

Prices always become public information when proposals are opened, and therefore cannot be designated as confidential.

Other information cannot be kept confidential unless it is a trade secret. Trade secret is defined in Sect. 134(80)(1)(c) Wis. State Statutes, as follows: "Trade secret" means information, including a formula, pattern, compilation, program, device, method technique or process to which all of the following apply:

1. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by other persons who can obtain economic value from its disclosure or use.
2. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

In the event the Designation of Confidentiality of this information is challenged, proposer hereby agrees to provide legal counsel or other necessary assistance to defend the Designation of Confidentiality.

Failure to include this form in the proposal response may mean that all information provided as part of the proposal response will be open to examination or copying. The County considers other markings of confidential in the proposal document to be insufficient. The undersigned agrees to hold the County harmless for any damages arising out of the release of any material unless they are specifically identified above.

REFERENCE DATA SHEET		
Provide company name, address, contact person, telephone number, and appropriate information on the product(s) and/or service(s) used for three (3) or more installations/services with requirements similar to those included in this solicitation document		
NAME OF FIRM:		
STREET ADDRESS:		
CITY, STATE, ZIP		
CONTACT PERSON:		EMAIL:
PHONE #:		FAX #:
Product(s) and/or Service(s) Used:		
NAME OF FIRM:		
STREET ADDRESS:		
CITY, STATE, ZIP		
CONTACT PERSON:		EMAIL:
PHONE #:		FAX #:
Product(s) and/or Service(s) Used:		
NAME OF FIRM:		
STREET ADDRESS:		
CITY, STATE, ZIP		
CONTACT PERSON:		EMAIL:
PHONE #:		FAX #:
Product(s) and/or Service(s) Used:		

Affordable Housing Development Sites

WHEDA (Wisconsin Housing and Economic Development Authority), Dane County and City of Madison Sites, 2009-2018

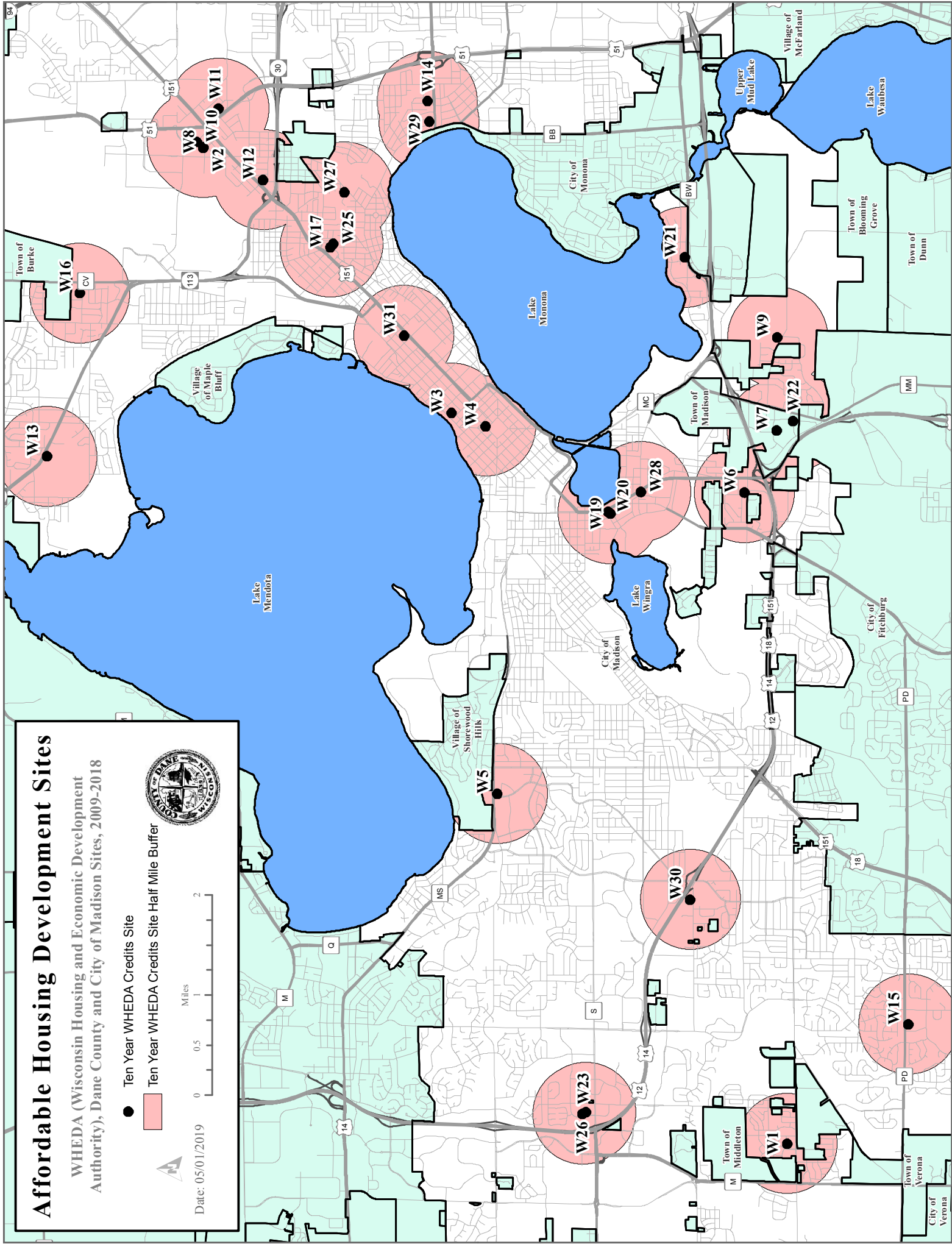


● Ten Year WHEDA Credits Site

■ Ten Year WHEDA Credits Site Half Mile Buffer



Date: 05/01/2019



ATTACHMENT D **PROJECTS IN THE CITY OF MADISON, 2009-2019**

SITE ID	YEAR	DEVELOPMENT NAME	PARCEL NO.	ADDRESS	MUNICIPALITY	ZIP
W1	2009	The Overlook at Midtown	070834408051	8119 MAYO DR	MADISON	53719
W2	2009	Truax Park Redevelopment, Phase 1	081032108046	3502 STRAUBEL ST UNIT LAND	MADISON	53704
W3	2009	City Row Apartments	070913311365	602 E JOHNSON ST	MADISON	53703
W4	2009	YWCA Madison Housing	070913330084	101 E MIFFLIN ST	MADISON	53703
W5	2010	The Overlook at Hilldale	070920201046	4620 FREY ST	MADISON	53705
W6	2010	Burr Oaks Senior Housing	070935203219	2417 CYPRESS WAY	MADISON	53713
W7	2011	Pheasant Ridge Apartments	070935462767	2701 PHEASANT RIDGE TRL	MADISON	53713
W8	2011	Truax Park Redevelopment, Phase 1	081032108046	3502 STRAUBEL ST UNIT LAND	MADISON	53704
W9	2012	Nob Hill Apartments	070936400971	1108 MOORLAND RD	MADISON	53713
W10	2013	Traux Development, Phase 2	081032108054	3538 STRAUBEL ST	MADISON	53704
W11	2013	Eagle Harbor Apartments	081033210022	1360 MACARTHUR RD	MADISON	53714
W12	2014	Madison Supportive Housing	081032430366	715 RETHKE AVE	MADISON	53714
W13	2014	Ridgecrest Apartments (Northridge Terrace)	080926400906	501 NORTHPORT DR	MADISON	53704
W14	2014	Dempsey Place Apartments	071009217269	902 ROYSTER OAKS DR	MADISON	53714
W15	2015	Maple Grove Commons	060812209167	3204 GOLDEN COPPER LN	MADISON	53719
W16	2015	Tennyson Ridge	081030201040	1936 TENNYSON LN	MADISON	53704
W17	2015	Union Corner Apartments	071006135133	2418 WINNEBAGO ST UNIT CDM	MADISON	53704
W18	2016	The Breese	070913131010	1004 E WASHINGTON AVE	MADISON	53703
W19	2016	8Twenty Park Phase II	070926218285	903 DELAPLAINE CT UNIT CDM	MADISON	53715
W20	2016	8Twenty Park Phase I	070926218277	820 S PARK ST	MADISON	53715
W21	2016	The Royal	071019412023	5329 FAYETTE AVE	MADISON	53713
W22	2016	Novation Senior Apartments	070936323450	2675 NOVATION PKWY	MADISON	53713
W23	2016	Madison Family Supportive Housing/Tree Lane Apartments	070823308098	7933 TREE LN	MADISON	53717
W24	2017	Normandy Square Senior Apartments	070825208022	504 S YELLOWSTONE DR	MADISON	53719
W25	2017	Union Corners Grand Family	071006134284	2431 WINNEBAGO ST	MADISON	53704
W26	2018	Tree Lane Senior Apartments	070823308048	7945 TREE LN	MADISON	53717
W27	2018	Fair Oaks Apartments	071005344074	130 S FAIR OAKS AVE	MADISON	53704
W28	2018	Park Street Apartments	070926209052	1202 S PARK ST	MADISON	53715
W29	2018	The Grove Apartments	071009223141	208 COTTAGE GROVE RD	MADISON	53716
W30	2019	Schroeder Road Apartments	070930301076	5614 SCHROEDER RD	MADISON	53711
W31	2019	Valor on Washington	070913102110	1326 E WASHINGTON AVE	MADISON	53703

Fair Tenant Selection Criteria

Respondents to this RFP that agree to the tenant selection criteria below will receive 10 points.

General Screening Process

The screening process applied to the project must not deny applicants based on the following:

- a. Inability to meet a minimum income requirement if the applicant can demonstrate the ability to comply with the rent obligation based on a rental history of paying at an equivalent rent to income ratio for 12 months;
- b. Lack of housing history;
- c. Credit score;
- d. Information on credit report that is disputed, in repayment, or unrelated to a past housing or utility (gas, electric, and water only) obligations.
- e. Inability to meet financial obligations other than housing and utilities necessary for housing (gas, electric, water).
- f. Owing money to a prior landlord or negative rent payment history if the tenant's housing and utility costs were more than 50% of their monthly income.
- g. Owing money to a prior landlord or negative rent or utility payment history if applicant does one of the following: (1) establishes a regular record of repayment of the obligation; 2) signs up for automatic payment of rent to the housing provider; or (3) obtains a representative payee.
- h. Wisconsin Circuit Court Access records;
- i. Criminal activity, except: (i) violent criminal activity within the last year resulting in a criminal conviction, and (ii) if the program or project is federally assisted, criminal activity for which federal law currently requires denial. (*Violent criminal activity* is defined in 24 C.F.R § 5.100 and means any criminal activity that has as one of its elements the use, attempted use, or threatened use of physical force substantial enough to cause, or be reasonably likely to cause, serious bodily injury or property damage.)
- j. Membership in a class protected by Dane County fair housing ordinances and non-discrimination ordinances in the municipality where the project is located.

Denial Process

- 1) Prior to a denial based on a criminal record, the housing provider shall provide the applicant a copy of the criminal record and an opportunity to dispute the accuracy and relevance of the report, which is already required of HUD assisted housing providers. See 24 C.F.R. § 982.553(d), which applies to public housing agencies administering the section 8 rent assistance program.
- 2) Prior to a denial based on a criminal record, the housing provider shall provide the applicant the opportunity to exclude the culpable family member as a condition of admission of the remaining family members.
- 3) Prior to a denial decision, the housing provider shall meet with the applicant to review their application and make an individualized determination of their eligibility, considering: (a) factors identified in the provider's own screening policies, (b) if applicable, federal regulations, and (c) whether the applicant has a disability that relates to concerns with their eligibility and an exception to the admissions rules, policies, practices, and services is necessary as a

reasonable accommodation of the applicant's disability. In making a denial decision, the housing provider shall consider all relevant circumstances such as the seriousness of the case, the extent of participation or culpability of individual family members, mitigating circumstances related to the disability of a family member, and the effects of denial on other family members who were not involved in the action or failure.

- 4) The property manager will base any denial on sufficient evidence. An arrest record or police incident report is not sufficient evidence. Uncorroborated hearsay is not sufficient evidence.
- 5) Denial notices shall include the following:
 - a) The reason for denial with details sufficient for the applicant to prepare a defense, including:
 - i) The action or inaction forming the basis for the denial,
 - ii) Who participated in the action or inaction,
 - iii) When the action or inaction was committed, and
 - iv) The source(s) of information relied upon for the action or inaction.
 - b) Notice of the applicant's right to a copy of their application file, which shall include all evidence upon which the denial decision was based.
 - c) Notice of the applicant's right to copies of the property manager's screening criteria.
 - d) Notice of the right to request an in-person hearing on the denial decision by making a written request for a hearing within 45 days.
 - e) Notice of the right to have an advocate present at the hearing and of the right to be represented by an attorney or other representative.
 - f) Notice of the right to present evidence in support of their application, including, but not limited to evidence related to the applicant's completion or participation in a rehabilitation program, behavioral health treatment, or other supportive services.
- 6) The if the applicant requests an in-person hearing, the hearing will be conducted by a person who was not involved in or consulted in making the decision to deny the application nor a subordinate of such a person so involved.

Tenancy Addendum

Respondents to this RFP that agree to include the following provisions within all tenant leases or as an addendum to all tenant leases will receive 10 points.

- a. **Security Deposits.** The amount of a security deposit shall not be more than one month's rent.
- b. **Late Fees and Other Fees.** Late fees must be set forth in the rental agreement. Late fees shall not exceed 5% of the tenant's portion of the monthly rent. Other penalty fees are prohibited. All other fees must be directly related to the cost for a specific amenity or service provided to the tenant and comply with all applicable laws.
- c. **Rights of Youth to Access Common Spaces.** Youth under the age of 18 are allow to use and enjoy common areas without supervision.
- d. **Good Cause for Termination.** A tenancy may not be terminated during or at the end of the lease unless there is good cause. Good cause is defined as a serious violation of the lease or repeated minor violations of the lease. Repeated means a pattern of minor violations, not isolated incidents. Termination notices and procedures shall comply with Chapter 704 of Wisconsin Statutes and federal law, when applicable. Written notice is required for non-renewal and shall include the specific grounds for non-renewal and the right of the tenant to request a meeting to discuss the non-renewal with the landlord or landlord's property management agent within fourteen (14) days of the notice. If requested, the landlord or property management agent will meet with the tenant to discuss the non-renewal, allow the tenant to respond to the alleged grounds for non-renewal, and pursue a mutually acceptable resolution.
- e. **Reasonable Guest Rules.** Tenants have the right to have guests. In the event the property management establishes rules related to guests, they must be reasonable. Unreasonable rules include, but are not limited to the following: (1) Prior authorization of guests by the property management, unless the guest is staying for an extended period of time (e.g. more than 2 weeks); (2) Prohibition on overnight guests; (3) Requiring that the resident be with the guest at all times on the property. (4) Requiring guests to show ID unless requested by the tenant. (5) Treating caregivers, whether caring for a child or children, or an adult with disabilities, as guests.

Landlord may ban a person who is not a tenant from the rental premises if the person has committed violent criminal activity or drug related criminal activity at rental premises. No person shall be banned from the rental premises without the consent of the tenant unless the following have taken place:

- (1) A notice of the ban is issued to the tenant stating the:
 - (a) name of the person banned,
 - (b) grounds for the ban including, (i) the specific facts detailing the activity resulting in the ban; (ii) the source of the information relied upon in making the ban decision; and (iii) a copy of any criminal record reviewed when making the ban decision; and

(c) the right of the tenant to have a meeting to dispute the proposed ban, discuss alternatives to the ban, and address any unintended consequences of the proposed ban.

(2) If requested, a hearing on the ban has taken place to provide the tenant an opportunity to dispute the proposed ban, discuss alternatives of the ban, and address any unintended consequences of the proposed ban.

A tenant may not invite or allow a banned person as a guest on the premises, provided the Landlord has followed the proper procedure and given notice to Tenant as set forth herein.

A tenant who violates the guest policy may be given a written warning detailing the facts of the alleged violation. The written warning shall detail the violation, and warn the tenant that repeated violations may result in termination of tenancy. Tenants that repeatedly violate the guest policy, (e.g. three (3) or more violations within a twelve (12) month period) may be issued a notice of termination in accordance with state and federal law.

Nothing in this policy limits a person's right to pursue a civil order for protection against another individual.

- f. **Parking Policies.** Parking policies and practices must comply with applicable laws. Vehicles shall not be towed to a location that is more than 6 miles from the rental premises, unless there is not a towing company with a tow location available within 6 miles.