

**INVITATION TO NEGOTIATE (ITN) 2020-05**

**NEEDS ASSESSMENT FOR HOMELESS/SPECIAL NEEDS HOUSEHOLDS**

**for**

**FLORIDA HOUSING FINANCE CORPORATION**

**April 23, 2020**

## **SECTION ONE INTRODUCTION**

Florida Housing Finance Corporation (“Florida Housing”) is soliciting competitive, sealed responses from qualified firms to provide a needs assessment and financial modeling in accordance with the terms and conditions set forth in this Invitation to Negotiate (ITN), and any other term and condition in any contract subsequently awarded. Respondents will be selected and determined through Florida Housing’s review of each response, considering the factors identified in this ITN. Florida Housing expects to select one Respondent that proposes to provide all of the services specified in this ITN.

## **SECTION TWO DEFINITIONS**

For purposes of this document, the following terms will be defined as follows:

“BAFO”	Best and Final Offer.
“Board”	The Board of Directors of Florida Housing Finance Corporation.
“Committee”	The review committee composed only of employees of Florida Housing that is established pursuant to Rule 67-49.007, Fla. Admin. Code.
“Contractor”	A person or entity providing the professional services described in Section Four of this ITN.
“Days”	Calendar days, unless otherwise specified.
“Effective Date”	The date the last party signs the contract that is awarded as a result of this ITN.
“Florida Housing”	Florida Housing Finance Corporation, a public corporation and public body corporate and politic created by Section 420.504, Fla. Stat.
“ITN”	This ITN, including all exhibits referenced in this document and all other documents incorporated by reference.
“Respondent”	Any person, entity, or team of entities who submits a response to this ITN.
“Response”	The written submission by a Respondent to this ITN.
“SQSO”	Statement of Qualifications and Services Offered.

“Website”

The Florida Housing Finance Corporation website,  
the URL of which is [www.floridahousing.org](http://www.floridahousing.org).

### **SECTION THREE PROCEDURES AND PROVISIONS**

A. This ITN includes a multi-stage process of Contractor selection. In the first stage, Respondents will submit an initial Response called a Statement of Qualifications and Services Offered (SQSO). These Responses will be scored and the review committee will select one or more Respondents to enter into a negotiation phase. Following the negotiation process, each Respondent will submit firm, final written offers (Best and Final Offer or BAFO). For both types of Responses, the Respondent will submit their Response to <https://www.floridahousing.org/legal/procurements/ITN-2020-05-Document-Upload>, and Florida Housing must receive the entire Response on or before 2:00 p.m., Eastern Time, as Responses will be opened at that time. Any Responses received after the deadline will be considered non-responsive. One complete copy of the response in PDF format is preferred, unless specified otherwise in Section Six below, and the file name ought to contain a reference to both the solicitation number (ITN 2020-05) and the name of the Respondent. Please note that the site will ask for the Respondent's contact information and the solicitation number prior to being able to upload the Response. Florida Housing will not accept a mailed or faxed Response.

B. This ITN does not commit Florida Housing to award a contract to any Respondent or to pay any costs incurred in the preparation or mailing of a Response.

C. All services under the contract awarded are to be performed solely by the Contractor, unless subcontracted or assigned with the prior written approval and consent of Florida Housing.

D. Florida Housing reserves the right to:

1. Waive minor deficiencies and informalities;
2. Accept or reject any or all Responses received as a result of this ITN;
3. Obtain information concerning any or all Respondents from any source;
4. Request an oral interview before the Board from any or all Respondents;
5. Select for contract negotiation or for award a Response other than (or in addition to) that with the highest score in order to serve the best interests of Florida Housing and the public; and
6. Negotiate with the successful Respondent with respect to any additional terms or conditions of the contract.

E. Any interested party may submit any question regarding this ITN in writing via e-mail to the Contract Administrator at [Contract.Admin@floridahousing.org](mailto:Contract.Admin@floridahousing.org). All questions must

be submitted no later than 2:00 p.m., Eastern Time, on May 4, 2020. Phone calls will not be accepted. Florida Housing expects to respond to all questions in writing by 5:00 p.m., Eastern Time, on May 8, 2020. Florida Housing will post a copy of all questions received and the corresponding answers on Florida Housing's website at:

<http://www.floridahousing.org/legal/procurements/invitations-to-negotiate>.

Only written responses or statements from the Contract Administrator that are posted on our website will bind Florida Housing. No other means of communication, whether oral or written, may be construed as an official response or statement from Florida Housing.

F. The SQSO must be submitted no later than 2:00 p.m., Eastern Time, on May 27, 2020. **NOTE:** SQSOs are not public records subject to the provisions of section 119.07(1), Fla. Stat., until such time as the Corporation provides notice of a decision pursuant to section 120.57(3)(a), Fla. Stat., or as provided in Section 119.071(1), Fla Stat.

G. Demonstrations and Negotiations with selected Respondents will occur between June 22 – 26, 2020.

H. The BAFO from Respondents selected for negotiations must be submitted no later than 2:00 p.m., Eastern Time, on July 15, 2020. **NOTE:** BAFOs are not public records subject to the provisions of section 119.07(1), Fla. Stat., until such time as the Corporation provides notice of a decision pursuant to section 120.57(3)(a), Fla. Stat., or as provided in Section 119.071(1), Fla Stat.

I. Between the release of the solicitation and the end of the 72-hour period following the posting of the notice of intended award, respondents to this solicitation or persons acting on their behalf may not contact any member of Florida Housing's Board of Directors or any Florida Housing employee concerning any aspect of this solicitation, except in writing to the Contract Administrator. Violation of this provision may be grounds for rejecting a response.

J. Any person who wishes to protest the specifications of this ITN must file a protest in compliance with Section 120.57(3), Fla. Stat., and Rule Chapter 28-110, Fla. Admin. Code. Failure to file a protest within the time prescribed in Section 120.57(3), Fla. Stat., will constitute a waiver of proceedings under Chapter 120, Fla. Stat.

K. The term of the contract is anticipated to be up to one year, subject to negotiations and satisfactory performance at the sole discretion of Florida Housing. If the parties mutually agree in writing, the contract may be renewed once for an additional six months.

L. Florida Housing is not required to use the services of any selected Contractor or to assign any work to such provider, and may terminate the contract with any selected Contractor without cause and without penalty.

M. Pursuant to Rule 67-49.004, Fla. Admin. Code, Florida Housing may modify the terms of the ITN at any point prior to the due date for Responses. A notice of such modification will be posted on Florida Housing's Website. Any Respondent will have at least seven days from the date

of the posting of the notice of the modification to submit or modify its Response.

N. The terms of this ITN, and any modifications thereto, will be incorporated into any contract offered as a result of this ITN. Failure of a successful Respondent to accept these obligations in the final contract may result in cancellation of the award.

## **SECTION FOUR SCOPE OF SERVICES**

### **A. Overview**

Florida Housing is seeking a vendor to conduct a state-level needs assessment to identify the rental housing needs of Special Needs and Homeless populations with incomes at or below 60% of area median income (AMI), and perform financial modeling to provide access to the number of units required to meet the various housing needs determined by the needs assessment. The financial modeling will project: the capital costs of financing this housing; funding support needed to lower barriers to entry to this housing; and funding support to offset projected operating deficits and replacement reserves. A contract will be awarded to the Respondent who can demonstrate it has the understanding, qualifications, capacity, and experience to successfully carry out the intent of this project. Florida Housing expects the selected Contractor to conduct all aspects of the project in partnership with Florida Housing staff and relevant external stakeholders.

### **B. Definitions**

1. Homeless Household – As defined in s. 420.621(5), Fla. Stat., an individual or family who lacks a fixed, regular and adequate nighttime residence, including: an individual/family who is sharing the housing of other persons due to loss of housing, economic hardship or a similar reason; is living in a motel, hotel, travel trailer park or campground due to a lack of alternative adequate accommodations; is living in an emergency or transitional shelter; has a primary nighttime residence that is a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings; is living in a car, park, public space, abandoned building, bus or train station, or similar setting; or is a migratory individual/family who qualifies as homeless because he, she or it is living in circumstances described above. The term does not refer to an individual imprisoned pursuant to state or federal law or to individuals or families who are sharing housing due to cultural preferences, voluntary arrangements or traditional networks of support. The term does include an individual who has been released from jail, prison, the juvenile justice system, the child welfare system, a mental health and developmental disability facility, a residential addiction treatment program or a hospital, for whom no subsequent residence has been identified, and who lacks the resources and support network to obtain housing. Note that this definition includes people living in motels because they have no other affordable place to live.

2. Affordable Housing – For purposes of this ITN, general occupancy rental housing financed with public programs such that rents are restricted to serve households with incomes at or below 60% AMI; in which an individual in a unit may or may not have supportive services unrelated to the unit lease; and that has no time limit on residency assigned to it.

3. Permanent Supportive Housing – For the purpose of this ITN, housing paired with community-based services with onsite case management and/or service coordination to assist Persons with Special Needs or Homeless households achieve housing stability that allows an indefinite length of stay as long as the tenant complies with lease requirements and has a lease with a minimum of seven months with no requirements related to the provision of or participation in supportive services. Permanent Supportive Housing shall facilitate and promote activities of daily living, access to community-based services, and inclusion in the general community. It is possible that Permanent Supportive Housing units may be embedded in a broader Affordable Housing property.

4. Person with Special Needs – As defined in s. 420.0004(13), Fla. Stat., an adult requiring independent living services in order to maintain housing or develop independent living skills and who has a disabling condition; a young adult formerly in foster care who is eligible for services under s. 409.1451(5), Fla. Stat.; a survivor of domestic violence as defined in s. 741.28, Fla. Stat.; or a person receiving benefits under the Social Security Disability Insurance (SSDI) program, the Supplemental Security Income (SSI) program, or from veterans' disability benefits. This definition includes families with children at risk of separation because one or more adults in the household have Special Needs.

### **C. Goals and Deliverables**

The primary goals of the project are: first, carry out a needs assessment to determine the number and types of Affordable Housing and Permanent Supportive Housing units needed in Florida to sufficiently serve Homeless Households and Persons with Special Needs. Second, upon completion of the needs assessment, use the data and findings to estimate costs in four areas of need: a) Financing the capital costs to develop such housing throughout Florida; b) Lowering cost barriers to entry into such housing; and c) Addressing projected property operating deficits, including replacement reserve needs, due to the low level of rents needed to sustain many of these households.

To meet these goals, the Contractor will:

1. Work with Florida Housing staff and an advisory group of external stakeholders to agree on and formalize the research approach; methodology, including the ability to access and collect required data, or alternatives, to project need; and the timeline for the project. Florida Housing believes that a point-in-time needs assessment will be the most suitable approach but will consider other options.

2. Conduct the project based on the approach and methodology approved by Florida Housing. The Contractor will regularly meet with staff to seek counsel and discuss challenges, provide updates on the status of the research being conducted and, in a timely manner, address any research related concerns. The advisory group will also be an important source of information and perspective for this project.

3. Submit the needs assessment data and findings in a manner that will enable financial modeling to be performed to estimate costs across the three areas listed in sub-item

4., below. The Contractor and Florida Housing will agree on the format in which the data and findings must be submitted, and the information must be submitted in draft form for Florida Housing's review before being submitted as a final deliverable.

4. In conjunction with Florida Housing, conduct the proposed financial modeling to determine the best estimate of: the total capital costs to develop the number and different types of Affordable Housing and Permanent Supportive Housing Units determined by the needs assessment; total costs to lower barriers to housing entry; and costs to support projected operating deficits and replacement reserves.

5. Write and submit a report to Florida Housing that includes an executive summary; an introduction and overview of the project; summary and detailed descriptions of the needs assessment, financial modeling approach, and methodology; the data related to households studied and types of housing; findings; and conclusions.

Although Florida Housing recognizes that Permanent Supportive Housing by its very definition combines housing with supportive services tailored to each household's needs, this project will not include an assessment of the cost of supportive services to assist these households to live independently in their communities.

Florida Housing expects to invite Respondents to negotiate that have submitted SQSOs that best demonstrate their qualifications, knowledge, experience, and capacity required to conduct and complete the intended project deliverables.

## **D. Needs Assessment**

### **1. Count of Sub-Population Households, Their Characteristics and Their Rental Housing Needs**

The needs assessment must address the housing needs of a wide range of individuals and families that meet the definition of Homeless and/or Special Needs pursuant to this ITN. The Contractor must develop and execute a methodology that collects, compiles and analyzes data related to the number of Homeless and Special Needs households statewide and further delineated by three regions, to be determined, and the characteristics of these households that will allow a projection of the amount and type of housing to meet the variety of needs.

### **2. Projection of Housing Need**

a. Florida Housing expects the rental housing projections to address the unmet need for:

- 1) The total number of Permanent Supportive Housing units statewide and by region;
- 2) The total number of Affordable Housing units statewide and by region; and
- 3) The total number of households that need funding support to assist them in overcoming cost barriers to entry into housing.

4) The projections should not include the households in 1) and 2), above, that already are living in Affordable Housing, Permanent Supportive Housing, or are using HUD-VASH or other rental assistance to assist them.

b. The projections must provide detailed information to allow the State of Florida to develop realistic, responsive strategies to meet the intended households' needs. At a minimum, this information must include:

- 1) An analysis of the rent burden throughout the state faced by those identified in the needs assessment;
- 2) Location of needed housing by region, as delineated in the approved methodology;
- 3) The number of housing units needed based on household income, grouped by units needed to serve those at or below 30% AMI and those at 30.01-60% AMI;
- 4) The number of units by incomes to be served based on bedroom mix and any other broad design characteristics, including the number of accessible units for persons with mobility impairments;
- 5) A description of the development types that may be most conducive to serving subpopulations and/or the variety of needs within subpopulations;
- 6) The number and location by region of households that can manage restricted 60% AMI rents in Affordable Housing, but that need move-in support, such as security deposits;
- 7) The number and location by region of households that can manage restricted rents in Permanent Supportive Housing, but that need move-in support, such as security deposits; and
- 8) Other housing characteristics as appropriate.

In addition to any detailed data provided on housing need, and to provide a template for the financial modeling, the report will also include a summarized table compiling the total unit need for each type of housing under Permanent Rental Housing and, separately, Permanent Supportive Housing.

## **E. Financial Modeling of Housing and Housing Supports Needed to Serve these Populations**

The Contractor will work with Florida Housing, experts knowledgeable about HUD and other federal programs, and the advisory committee to develop Florida-based cost scenarios for each part of this section.

### **1. Modeling the Capital Cost of Developing Units**

a. Financial modeling will be based on the housing need identified in the needs assessment. Based on the approved methodology, financial models will be created for each type of housing and household income level identified in the needs assessment in Item D., above.



b. The report will include an explanation of factors, if any, that make the capital cost of developing Permanent Supportive Housing for these populations different from Affordable Housing.

## **2. Projecting Total Funding Needed to Lower Cost Barriers to Entry into Housing**

Financial modeling will be based on the needs assessment findings in Item D., above. Based on the approved methodology, financial models will be created for each cost barrier scenario identified in sub-items D.2.b.6) and 7).

## **3. Modeling Projected Property Operating Deficits and Replacement Reserves Needed Due to the Low Level of Rents Needed to Sustain Many of these Households**

At a minimum, modeling will be based on the housing types and ability-to-pay rent scenarios identified in the needs assessment in sub-item D.2. above. Based on the approved methodology, determine which housing/subpopulation scenarios will require operating assistance and assistance with replacement reserves, and model cost requirements for each.

## **F. Projecting Total Funding for Housing Needed to Serve these Populations**

1. Provide a summary of total funding needed across capital, housing entry assistance, and operating support costs to serve the total household populations identified in the needs assessment. The summary should aggregate funding at the state level and by region, and by identified housing types as appropriate.

2. Identify potential sources of funds to fill the gaps in funding for capital costs, costs to address barriers to entry, and property operating deficits and replacement reserves.

## **SECTION FIVE CERTIFICATION**

Do not reproduce the language of Section Five in the Response. By inclusion and execution of the statement provided in Section Six, subsection I, of this ITN, each Respondent certifies that:

A. The Respondent submits this Response without prior understanding, agreement, or connection with any person or entity submitting a separate Response for the same services. However, any agreement with a person or entity with whom the Response is jointly filed and such joint filing is made clear on the face of the Response will be an exception so long as the Response is in all respects fair and without collusion or fraud.

B. Any material submitted in response to this ITN is a public record pursuant to Chapter 119, Fla. Stat., and subject to examination upon request, but only after Florida Housing provides a notice of decision pursuant to Section 120.57(3), Fla. Stat., or within 30 days after the Response is opened, whichever is earlier.

C. The Respondent, if awarded a contract under this ITN, will comply with Section 420.512(5), Fla. Stat. For the purpose of Section 420.512(5), Fla. Stat., “Prohibited Business Solicitation Communications” is defined by Section 420.503(33), Fla. Stat.

D. The Respondent further affirms it is in compliance with Section 420.512(5)(c), Fla. Stat.

E. The Respondent is in compliance with Section 287.133(2)(a), Fla. Stat.

F. The Respondent understands and agrees to cooperate with any audits conducted in accordance with the provisions set forth in Section 20.055(5), Fla. Stat.

G. Pursuant to Section 119.0701(2)(b), Fla. Stat., the Respondent, if awarded a contract under this RFQ, will be required to comply with public records laws, specifically to:

1. Keep and maintain public records required by Florida Housing to perform the service.

2. Upon request from Florida Housing’s custodian of public records, provide Florida Housing with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in this chapter or as otherwise provided by law.

3. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the contractor does not transfer the records to Florida Housing.

4. Upon completion of the contract, transfer, at no cost, to Florida Housing all public records in possession of the contractor or keep and maintain public records required by Florida Housing to perform the service. If the contractor transfers all public records to Florida Housing upon completion of the contract, the contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the contractor keeps and maintains public records upon completion of the contract, the contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to Florida Housing, upon request from Florida Housing’ custodian of public records, in a format that is compatible with the information technology systems of the public agency.

Notwithstanding anything contained herein to the contrary, the provisions and requirements of this paragraph will only apply if and when the Contractor is acting on behalf of Florida Housing.

**If the Contractor has questions regarding the application of Chapter 119, Florida Statutes, to the Contractor’s duty to provide public records relating to this contract, contact the Corporation Clerk at:**

**Corporation Clerk**  
**227 N. Bronough Street, Suite 5000**  
**Tallahassee, Florida 32301-1329**  
**Phone: 850.488.4197**  
**E-mail: Corporation.Clerk@floridahousing.org**

H. The Respondent acknowledges that if awarded a contract it will be prohibited from engaging in activities in connection with services related to Florida Housing transactions that produce direct or indirect financial gain for the Respondent other than for the compensation agreed upon in the contract that results from this ITN, unless that Respondent has Florida Housing's written consent after Florida Housing has been fully informed of such activities in writing.

I. The Respondent acknowledges that if awarded a contract it will be prohibited from engaging in any actual, apparent, or potential conflict of interest. Should any such actual, apparent, or potential conflict of interest come into being subsequent to the effective date of the contract and prior to the conclusion of the contract, the Respondent will provide written notification (Notice of Conflict of Interest) to Florida Housing's Contract Administrator within 10 working days for review by Florida Housing's Executive Director in consultation with their Ethics Officer. If the Respondent is found to be in non-compliance with this provision, any compensation received in connection with this contract will be subject to forfeiture to Florida Housing.

J. The Respondent, in submitting this Response, acknowledges and agrees that the terms and conditions of this ITN, as well as any modifications thereto, will be incorporated into any contract offered as a result of this ITN.

K. CERTIFICATION STATEMENT:

**THE FOLLOWING WILL BE REPEATED IN THE RESPONDENT'S RESPONSE AND SIGNED BY AN INDIVIDUAL AUTHORIZED TO BIND THE RESPONDENT. THIS IS A THRESHOLD ITEM AND FAILURE TO INCLUDE THE CERTIFICATION STATEMENT BEARING AN ORIGINAL SIGNATURE WILL RESULT IN REJECTION OF THE RESPONSE.**

"I agree to abide by all conditions of ITN 2020-05 and certify that all information provided in this Response is true and correct, that I am authorized to sign this Response as the Respondent and that I am in compliance with all requirements of the ITN, including but not limited to, the certification requirements stated in Section Five of this ITN."

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Authorized Signature (Original)

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Print Name and Title

## **SECTION SIX INFORMATION TO BE PROVIDED IN SQSO**

In providing the following information, restate each item and sub-item (with its letter and number), limit the Response to one bound volume. Responses to the items must be included immediately after the restated items without any reference to any appendix.

### **A. COVER LETTER**

Each proposal must be accompanied by a cover letter that contains a general statement of the purpose of submission and includes the name, job title, address, office and cellular telephone numbers, and e-mail address of a primary contact person who will be responsible for day-to-day contact with Florida Housing, and any backup personnel who would be accessible if the primary contact cannot be reached.

### **B. GENERAL INFORMATION**

1. Provide evidence that the Respondent is eligible to do business in the State of Florida.
2. Describe the Respondent's presence in Florida, and ability to be accessible to Florida Housing staff, availability for meetings, conferences, consultation, etc.
3. Describe the Respondent's ability to provide the services requested in Section Four of this ITN immediately upon award of the contract.
4. Provide a statement of any other qualifications or services, which the Respondent considers to be significant, innovative or otherwise relevant to Florida Housing.

### **C. CUSTOMER REFERENCES**

Provide three separate, verifiable references for which the Respondent has provided services similar to those requested in Section Four of this ITN. Respondents may not use Florida Housing, any confidential clients, nor any subcontractors as a reference. The same client may not be listed for more than one reference. If the Respondent is made up of a team of entities who have not worked together before as a Contractor, references must be included for all entities. Include the company name, street address, contact name, and phone numbers for these references.

Florida Housing will attempt to call each of the three references to complete the questionnaire below. References should be available for contact between 9:00 a.m. and 5:00 p.m., Eastern Time. Florida Housing will attempt to call each reference three times. In the event that the contact person cannot be reached following three attempts, the Respondent will receive a score of zero for that reference evaluation. Florida Housing will not attempt to correct any of the supplied contact information. Final scores for this section will be averaged and rounded to the nearest whole number.

The following questions will be asked:

<b>TABLE 1 REFERENCE QUESTIONNAIRE</b>	
<b>Question</b>	<b>Score</b>
1. Briefly describe the services the vendor performed for your organization. [If the Respondent is a team made up of more than one entity, list the team members and ask: Did the vendor providing the services for your organization include the same team members? If yes, please specify the services performed by each team member.]	N/A
2. Did the vendor consistently meet all its performance milestones/deadlines?  Yes = 3; No = 0	
3. Did the vendor have the sufficient expertise and resources to complete each deliverable as promised? If the vendor was a team of more than one entity, was this true for each team member? To receive points for a “Yes,” the answer to this question (if applicable) must be Yes for all team members.  Yes = 3; No = 0	
4. How would you rate the vendor’s key staff and their ability to work with your organization? If the vendor was a team of more than one entity, was this true for each team member? If applicable, in the case of a team, points for each entity of a vendor will be averaged and rounded to the nearest whole number to arrive at the score for this question.  Excellent = 5; Good = 4; Acceptable = 3; Fair = 2; Poor = 1	
5. Did the vendor’s staff maintain open lines of communication with your organization? If the vendor was a team of more than one entity, was this true for each team member? To receive points for a “Yes,” the answer to this question (if applicable) must be Yes for all team members.  Yes = 3; No = 0	
6. Would you contract with this vendor again? If the vendor was a team of more than one entity, is this true for each team member? To receive points for a “Yes,” the answer to this question (if applicable) must be Yes for all team members.  Yes = 3; No = 0	
<b>TOTAL SCORE:</b>	

## D. EXPERIENCE AND RESOURCES

Describe the Respondent's experience providing the services or engaging in activities specifically as they relate to the work being requested in Section Four of this ITN. The description should include the Respondent's current capacity to timely meet the ITN deliverables, such as whether dedicated staff that are already proficient in specifically performing the required services are on board, or whether the Respondent must hire or contract with persons/entities with necessary experience.

## E. PROJECT ORGANIZATION AND PLAN

1. Provide an organizational chart for the project. The chart shall identify all project team members by name and their responsibilities, with the project leader clearly specified. This section shall also include a résumé, not to exceed one page in length, of all professional staff assigned to the project. Résumés should include name, education, project experience, and other experience related to the scope of services outlined in Section Four of this ITN.

2. Submit a detailed and specific work plan for this project. Define phases, milestones, activities, tasks, task duration, deliverables, task dependencies, and proposed timeline. Detail the key sources of data to be used for the needs assessment and financial modeling described in Section Four, Scope of Services, of this ITN. Any requirements for implementation by Florida Housing staff shall be clearly stated in the project plan. List any data sharing agreements that will be needed; whether the Respondent already has any of these agreements in place; and/or how the Respondent plans to expedite the creation of such agreements.

## F. FEES

1. Provide itemized fees to be charged in connection with the services described in Section Four of this ITN, with the grand total in bold text.

2. Fees proposed must include all charges relating to the services required under the contract and all out-of-pocket expenses, such as telephone, postage and shipping, printing and/or copy costs, and travel, if any. Florida Housing expects travel by the Contractor will not be needed. No costs will be reimbursed under the contract. Caveat language or multiple fee proposals will result in a score of zero for this section.

*FINAL FEE SCHEDULE WILL BE SUBJECT TO NEGOTIATION.*

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G. DRUG-FREE WORKPLACE

If the Respondent has implemented a drug-free workplace program, the Respondent must submit the following certification indicating that it meets all of the requirements of Section 287.087, Fla. Stat.:

I hereby certify on behalf of the Respondent, under the terms of ITN 2020-05, that the Respondent has implemented a drug-free workplace program pursuant to Section 287.087, Fla. Stat.

Authorized Signature: \_\_\_\_\_  
Print Name: \_\_\_\_\_  
Print Title: \_\_\_\_\_

H. MINORITY BUSINESS ENTERPRISE

If the Respondent is a minority business enterprise as defined in Section 288.703, Fla. Stat., the Respondent must submit the following certification:

I hereby certify on behalf of the Respondent, under the terms of ITN 2020-05 that the Respondent is a “minority business enterprise” as defined in Section 288.703(3), Fla. Stat.

Authorized Signature: \_\_\_\_\_  
Print Name: \_\_\_\_\_  
Print Title: \_\_\_\_\_

I. CERTIFICATION (Mandatory Item)

**FAILURE TO INCLUDE THE CERTIFICATION STATEMENT AS DESCRIBED IN SECTION FIVE OF THIS ITN BEARING AN ORIGINAL SIGNATURE WILL RESULT IN REJECTION OF THE RESPONSE.**

**SECTION SEVEN  
INFORMATION TO BE PROVIDED DURING DEMONSTRATIONS AND  
NEGOTIATIONS**

Respondents selected for negotiations must be prepared to discuss the ITN and their SQSO responses. The negotiation session will not be open to the public; however, they are recorded for public records purposes in accordance with s. 119.071, Fla. Stat. Discussions which are considered confidential or trade secret must be clearly denoted by the Respondent during their presentations.

**SECTION EIGHT  
INFORMATION TO BE PROVIDED IN BAFO**

In providing the following information, restate each item and sub-item (with its letter and number), limit your Response to one bound volume. Responses to the items must be included

immediately after the restated items without any reference to any appendix. Respondents should use the ‘track changes’ feature of Word and Excel to show changes made from the SQSO.

#### A. PROJECT ORGANIZATION AND PLAN

1. Provide an organizational chart for the project. The chart shall identify all project team members by name and their responsibilities, with the project leader clearly specified. This section shall also include a résumé, not to exceed one page in length, of all professional staff assigned to the project. Résumés should include name, education, project experience, and other experience related to the scope of services outlined in Section Four of this ITN.

2. Submit a detailed and specific work plan for this project. Define phases, milestones, activities, tasks, task duration, deliverables, task dependencies, and proposed timeline. Detail the key sources of data to be used for the needs assessment and financial modeling described in Section Four, Scope of Services, of this ITN. Any requirements for implementation by Florida Housing staff shall be clearly stated in the project plan.

#### B. FEES

1. Provide itemized fees to be charged in connection with the services described in Section Four of this ITN, with the grand total in bold text.

2. Fees proposed must include all charges relating to the services required under the contract and all out-of-pocket expenses, such as telephone, postage and shipping, printing and/or copy costs, and travel, if any. No costs will be reimbursed under the contract. Caveat language or multiple fee proposals will result in a score of zero for this section.

*FINAL FEE SCHEDULE WILL BE SUBJECT TO NEGOTIATION.*

#### C. DRUG-FREE WORKPLACE

If the Respondent has implemented a drug-free workplace program, the Respondent must submit the following certification indicating that it meets all of the requirements of Section 287.087, Fla. Stat.:

I hereby certify on behalf of the Respondent, under the terms of ITN 2020-05, that the Respondent has implemented a drug-free workplace program pursuant to Section 287.087, Fla. Stat.

Authorized Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Print Title: \_\_\_\_\_



D. MINORITY BUSINESS ENTERPRISE

If the Respondent is a minority business enterprise as defined in Section 288.703, Fla. Stat., the Respondent must submit the following certification:

I hereby certify on behalf of the Respondent, under the terms of ITN 2020-05, that the Respondent is a “minority business enterprise” as defined in Section 288.703(3), Fla. Stat.

Authorized Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Print Title: \_\_\_\_\_

E. CERTIFICATION (Mandatory Item)

**FAILURE TO INCLUDE THE CERTIFICATION STATEMENT AS DESCRIBED IN SECTION FIVE OF THIS ITN BEARING AN ORIGINAL SIGNATURE WILL RESULT IN REJECTION OF THE RESPONSE.**

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**SECTION NINE  
EVALUATION PROCESS**

The individual Committee members will independently evaluate each of the Responses by reviewing the answers to each of the items identified in Sections Six and Eight of this ITN and assigning points up to the maximum points allowed for each item. The points available for items in Section Six are to be evaluated are as follows:

**STATEMENT OF QUALIFICATIONS AND SERVICES OFFERED (SQSO)**

<u>Item Reference</u>	<u>Maximum Points</u>
B. General Information.....	5
C. Customer References .....	17
D. Experience and Resources .....	35
E. Project Organization and Plan .....	35
F. Fees .....	15
<b>Total Points Available.....</b>	<b><u>107</u></b>

For the SQSO Price Proposals, the Respondent with the lowest proposed total cost will receive the maximum allowable points (15 points). The remaining respondents will receive a percentage of the maximum points, rounded to the nearest whole number, based on the following formula:

Lowest Proposed Total Cost	=	%	x	15	=	Total Points Awarded for that “Total Cost” (Rounded to the nearest whole number)
÷ Current Respondent’s Proposed Total Cost						

Following the receipt of SQSOs, the Committee will conduct one or more public meetings during which members will discuss their evaluations and develop a recommendation or series of recommendations of which Respondents will move forward to negotiations. The Committee’s recommendation will be based on the cumulative scoring and information gathered from the non-scored items.

**BEST AND FINAL OFFER (BAFO)**

<u>Item Reference</u>	<u>Maximum Points</u>
A. Project Organization and Plan .....	60
B. Fees.....	15
<b>Total Points Available.....</b>	<b><u>75</u></b>

For the BAFO Price Proposals, the Respondent with the lowest proposed total cost will receive the maximum allowable points (15 points). The remaining respondents will receive a percentage of the maximum points, rounded to the nearest whole number, based on the following formula:

$\frac{\text{Lowest Proposed Total Cost}}{\text{Current Respondent's Proposed Total Cost}}$	=	%	x	15	=	Total Points Awarded for that "Total Cost" (Rounded to the nearest whole number)
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Following the receipt of the BAFOs, the Committee will conduct one or more public meetings during which members will discuss their evaluations and develop a recommendation or series of recommendations to the Board. The Committee's recommendation will be based on the cumulative scoring and information gathered from the non-scored items. The Board may use the Responses, the Committee's scoring, the non-scored items in the Responses, any other information or recommendation provided by the Committee or staff, and any other information the Board deems relevant in its selection of Respondents to whom to award a contract.

In the event of a tie, Florida Housing will give preference in the award process to the Response certifying a drug-free workplace has been implemented in accordance with Section 287.087, Fla. Stat. If a tie continues to exist, Florida Housing will give preference to minority business enterprises as defined in Section 288.703, Fla. Stat.

### **SECTION TEN AWARD PROCESS**

Florida Housing will provide notice of its decision, or intended decision, for this ITN on Florida Housing's Website the next business day after the applicable Board vote. After posting, an unsuccessful applicant may file a notice of protest and a formal written protest in accordance with Section 120.57(3), Fla. Stat. Failure to file a protest within the time prescribed in Section 120.57(3), Fla. Stat. or failure to post the bond or other security required by law within the time allowed for filing a bond will constitute a waiver of proceedings under Chapter 120, Fla. Stat.