



**DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT**

**HOUSING DEVELOPMENT SERVICES DIVISION**

**250 FRANK H. OGAWA PLAZA STE. 5313**

**OAKLAND, CA 94612**

**REQUEST FOR PROPOSALS/QUALIFICATIONS**

**(RFP/RFQ)**

For

**OWNER/DEVELOPER/PROPERTY MANAGER**

**E.C. REEMS GARDENS APARTMENTS**

**2700 ALVINGROOM COURT**

**OAKLAND, CA 94605**

**Due Date: Monday, September 25, 2017 @ 4 P.M.**

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**I. INTRODUCTION**

The City of Oakland, Department of Housing and Community Development, Housing Development Services division (the "City") is pleased to announce an ownership, development and property management opportunity at 2700 Alvingroom Court in Oakland. The City seeks knowledgeable, financially sound and experienced for-profit or non-profit owners/developers/property managers meeting the qualifications described in this RFP/RFQ that have demonstrated their ability to own, rehabilitate, manage, or otherwise develop quality housing in Oakland or in the wider Bay Area region.

**Pre-proposal Meeting Date and Time (Voluntary):** Thursday, August 31, 2017 at 3:00 PM in Hearing Room 3, 1 Frank H. Ogawa Plaza, Oakland, CA 94612

**Deadline for Questions:** 2:00 PM, September 7, 2017 by email to the Project Manager, [apietras@oaklandnet.com](mailto:apietras@oaklandnet.com).

**Proposal Submittal Deadline Date and Time:** Monday, September 25, 2017 at 4:00 PM

**Deliver To:** Antoinette Pietras, Housing Development Coordinator  
250 Frank Ogawa Plaza 5<sup>th</sup> Floor, Suite 5313, Oakland, Ca 94612  
Phone: (510) 238-6177

Proposals must be received and time stamped by Housing and Community Development Staff no later than 4:00 P.M. on **September 25, 2017**. **Proposals not received at the above location by the Proposal Submittal Deadline are late and may be returned to proposers unopened.**

**Contact Information:** The following City staff are available to answer questions regarding this RFP/RFQ:

1. Project Manager: Antoinette Pietras at [apietras@oaklandnet.com](mailto:apietras@oaklandnet.com), or (510) 238-6177 and/or Housing Development Manager, Norma Thompson, [nthompson@oaklandnet.com](mailto:nthompson@oaklandnet.com), or (510) 238-7137.

**PROJECT DESCRIPTION**

The City of Oakland is pleased to announce an ownership/development/property management opportunity at E.C. Reems Gardens Apartments/Alvingroom Court (the "Project") at 2600-2795 Alvingroom Court in the City of Oakland. The City does not own the Project, but has obtained a senior security interest in the Project. The deeds of trust securing the City's security interest are in default. The City is seeking to assign its security interest to a housing owner/developer/property manager with experience working with troubled affordable housing properties, financial capacity, and the staffing necessary to handle the at-risk tenant population. It will be the responsibility of the assignee of these interests to transition the Project to new ownership and property management.

The Project is a 126-unit multi-family affordable housing complex located at 2600-2795 Alvingroom Court. The apartments were constructed in 1948 and rehabilitated between 1997-1999. The Project consists of one, two and three bedroom units scattered throughout fifteen buildings. In the last several years, the Project repeatedly failed the Department of Housing and Urban Development Real Estate Assessment Center inspections and the City's physical and financial reviews under its asset monitoring inspection program. The owners are in default under HUD's and the City's Regulatory Agreements.

#### **MINIMUM OWNER/DEVELOPER QUALIFICATIONS**

The scope of qualifications includes:

- Development Experience – The development entity must have experience successfully completing at least three housing development projects including substantial rehabilitation and/or demolition and new construction projects. At least one of the completed projects must be similar to the project for which this RFP/RFQ is being sought. Developers must submit the following information concerning completed projects.
  1. The type of project developed (number of units, funding sources, total development cost, new construction or rehabilitation).
  2. Location of project.
  3. Date of project start and completion.
  4. List of staff members involved in the development of the project.
  5. The income level of the households that were served.
  6. Name, title, and telephone number of staff member of local governing body most familiar with the project.
  7. Whether project was on time and on budget (relative to schedule and budget at start of construction).
- Joint Ventures - Prior to funding approval the City must review and approve all joint venture agreements. In all joint ventures, a majority interest and control must be held by the development entity meeting the City requirements for experience as described.
- Required Experience of the Development Team, Capacity and Staffing. Submit resumes and job descriptions of the following key staff:
  1. Developer/owner and Project management must have experience with at least three similar projects to the proposed project.
  2. Architect must have experience with at least three similar projects to the proposed project.
  3. Attorney should have experience in the relevant area, for example, housing and redevelopment law, corporation law, real estate law, or knowledge and understanding in low income housing tax credit syndication.

4. Development and/or Financial Consultant must have experience with at least three similar projects. A development or financial consultant is not required if the developer and development team possess sufficient experience.

#### **MINIMUM PROPERTY MANAGEMENT QUALIFICATIONS**

If the owner/developer desires to act as the property manager, the following requirements must be met in addition to the minimum developer/owner qualifications:

1. Submit evidence of experience managing three similar projects.
2. Submit a list of all projects managed within the past five years, including current status.
3. Submit evidence of experience with the management of projects that are subject to rent and occupancy restrictions.
4. This is a complex project; please demonstrate experience with a project of similar complexity.
5. Provide other evidence that the management company has the capacity to take on the Project.
6. Submit resumes and job descriptions of key management staff.

## **II. SERVICES**

The services expected from the owner/developer will include:

- Preliminary Investigation of Existing Problems – assess the physical condition of the Project, including any deferred maintenance and health and safety conditions.
- Preliminary Investigation of Resident Files – assess the existing resident files, including making sure that each resident has a validly executed lease.
- Preliminary Investigation of Resident Income Levels – assess residents' rent level based on the City's Area Median Income schedule.
- Preliminary Investigation of Lease Violations – assess the number of residents who fail to pay rent and issue related notices.
- Preliminary Investigation of the Financial Status – assess collections and payables to determine how to stabilize the operations, cover expenses and maximize rental income.
- Maintain photo documentation (before and after photos) of any and/or all repairs.
- Follow a regular weekly maintenance schedule of the site (including sidewalks fronting the property) to ensure that the exterior and interior of the property is free of trash, debris, vandalism and graffiti.

- Track maintenance work and submit updates to the Department of Housing and Community Development, Housing Development Services Division **on a monthly basis** with an itemized list of services, dates and times, detailed description of services, and photo documentation showing conditions before and after work completed.
- Market the Property for Rent – create ads tailored to the property and advertising medium according to fair housing laws. Some of the mediums commonly accepted for use: paid and free rental listing websites, local print publications, signs and fliers. Field calls from prospective tenants. Meet prospective tenants for showings. Provide 24-hour hot-line where prospective tenants can listen to detailed information about the property. Provide prospective tenants with rental applications that are legally compliant with fair housing laws. Collect applications with application fee.
- Perform Tenant Screening and Selection – perform a background check to verify identity, income, credit history, rental history and criminal history, if any. Evaluate tenant according to pre-defined tenant criteria. Notify tenant applicants if they were accepted or turn down.
- Prepare Tenant Move-In Documentation – draw up leasing agreement with correct rental rate and move-in date. Review general lease guidelines, Federal HOME guidelines, housekeeping rules and rental payment terms. Perform detailed move-in inspection with tenant and have tenant sign a report verifying the condition of the property prior to move-in. Collect first month's rent and security deposit.
- Rent Collection – receive rent, issue late payment notices, prepare and send out pay or quit notices and collect late fees.
- Financial – make payments on behalf of the owner, including but not limited to, debt-service, insurance, operating expenses and miscellaneous expenses. Detailed documentation of expenses via invoices and receipts. Maintain all historical records (paid invoices, leases, inspection reports, warranties, etc.). Provide annual reporting, structured for tax purposes as well as required tax documents including a 1099 form. Advise owner on relevant tax deductions related to their rental property. Provide easy to read monthly cash-flow statements which offer a detailed breakdown of income and itemized expenses.
- Inspections – perform periodic inspections (inside and outside) on a monthly basis looking for repair needs, safety hazards, code violations, lease violations, evidence of criminal activity, loitering, illegal dumping, graffiti and abandoned vehicles.
- Maintenance, Repairs, and Rehabilitation – provide and oversee the maintenance staff. Evaluate and update the maintenance policy to identify and deal with repair needs. Assign jobs to different parties (in-house staff, handyperson and professional contractors) based on task, skill and costs. Maintain outdoor areas, including common areas, leaf and foliage removal, landscaping, and removing trash and debris. Maintain and monitor a 24-hour emergency repair hot-line.

- Security Measures – provide around-the-clock security during the evenings and weekends to prevent unauthorized and uninvited guests from entering the property.

**III. THE PROPOSAL**

**A. GENERAL INFORMATION**

1. The City reserves the right to reject any and all proposals.
2. The following City staff are available to answer questions:  

RFP/RFQ and Project related issues: Norma Thompson, Housing Development Manager, (510) 238-7137

Project Manager: Antoinette M. Pietras, (510) 238-6177
3. All responses to the RFP/RFQ become the property of the City.
4. The RFP/RFQ does not commit the City to pay any cost incurred in the preparation of the proposal.
5. The City reserves the sole right to evaluate each proposal and to accept or reject any or all proposals received as a result of the RFP/RFQ process.
6. The City reserves the unqualified right to modify, suspend, or terminate at its sole discretion any and all aspects of the RFP/RFQ, to obtain further information from any and all teams and to waive any defects as to form or content of the RFP/RFQ or any responses by any teams
7. The City may require a proposer to participate in negotiations and submit technical information or other revisions to the proposer's qualifications as may result from negotiations.
8. Once a final decision is made, all RFP/RFQ responses, except financial and proprietary information, become a matter of public record and shall be regarded by the City as public records. The City shall not in any way be liable or responsible for the disclosure of any such records or portions thereof if the disclosure is made pursuant to a request under the California Public Records Act or the City of Oakland Sunshine Ordinance.
9. The Fair Political Practices Act and/or California Government Code Section 1090, among other statutes and regulations may prohibit the City from contracting with a party if the party or an employee, officer or director of the party's firm, or any immediate family of the preceding, or any subcontractor or contractor of the party, is serving as a public official, elected official, employee, board or commission member of the City who will award or influence the awarding of the contract or otherwise participate in the making of the contract.

**B. SUBMITTAL REQUIREMENTS**

Submit six (6) copies of proposal. The proposals are due at the Department of Housing and Community Development, Housing Development Services Unit, 250 Frank H. Ogawa Plaza, Suite 5313, Oakland, CA 94612 time stamped by no later than 4:00 P.M. September 25 2017. Proposals not received at the above location by the Proposal Submittal Deadline are late and may be returned to proposers unopened.

All proposals submitted via US Mail or common carrier must be delivered in a sealed package with the project name, submittal date, time and location of the proposals on the outside of the package or the documents.

**C. REQUIRED PROPOSAL ELEMENTS AND FORMAT**

1. Transmittal Letter

- a. Addressed to Michele Byrd, Director, Department of Housing and Community Development 250 Frank Ogawa Plaza, 5<sup>th</sup> Floor, Oakland, California, 94612.
- b. Signed by an officer of the proposer. In case of joint venture or other joint-prime relationship, an officer of each venture partner shall sign.

2. Team

- c. In response to this RFP/RFQ, the prime proposer shall be qualified owner/developer/property management firm. For LBEs/SLBEs, submit a copy of current business license and date established in Oakland.

3. Relevant Experience

- a. Describe experiences with three similar projects to include a brief description of recommendations and outcomes.
- b. If the team has worked together collaboratively, please include a description of this work.
- c. Describe experiences and ability to work effectively with City staff, community groups, and other stakeholders.

4. Project Approach and Organization

- a. Present your concept of the approach and organization required for this project. Indicate your understanding of the critical project elements.
- b. Describe how you intend to interface with City staff and the community.

5. References

- a. Three business related references, giving name, company, address, telephone number and business relationship.

6. Proprietary Information All responses to the RFQ become the property of the City.

**D. REJECTION OF PROPOSAL ELEMENTS**

The City reserves the right to reject any or all proposals, whether or not minimum qualifications are met, and to modify, postpone, or cancel this RFP/RFQ without liability, obligation, or commitment to any party, firm, or organization. The City reserves the right to request and obtain additional information from any candidate submitting a proposal. A proposal may be rejected for any of the following reasons:

- Proposal received after designated time and date.
- Proposal not containing the required elements, exhibits, nor organized in the required format.
- Proposal considered not fully responsive to this RFP/RFQ.

**E. EVALUATION OF PROPOSALS**

The following sample of criteria and the points for each criterion, for a total of 110 points, may be used in evaluating and rating the proposals:

1) Relevant Experience .....30 points

- Past, recently completed, or on-going projects to substantiate experience.
- Experience on at least three (3) projects providing services similar to those described in this RFP/RFQ.
- Prior experience and ability to work with City staff, community groups, and other stakeholders.

2) Qualifications .....25 points

- Professional background and qualifications of team members and firms comprising the team.

3) Organization .....20 points

- Current workload, available staff and resources.
- Capacity and flexibility to meet schedules, including any unexpected work.
- Ability to perform on short notice and under time constraints.

- Cost control procedures in design and construction.
- Ability to perform numerous projects at the same time.

4) Approach .....20 points

- Understanding of the nature and extent of the services required.
- A specific outline of how the work will be performed.
- Awareness of potential problems and providing possible solutions.
- Special resources the team offers that are relevant to the successful completion of the project.

5) Other Factors.....10 points

- Presentation, completeness, clarity, organization, and responsiveness of proposal.

**F. INTERVIEWS OF SHORT-LISTED FIRMS**

Interviews of short-listed qualified candidates may be held if a selection is not made from the evaluation phase.

1) It is anticipated that approximately three teams will be invited to interview. The selected teams will be notified in writing, the interviews will last approximately 60 minutes, with the time allocated equally between the team's presentation and a question-and-answer period. The teams should be prepared to discuss at the interview their specific experience providing services similar to those described in the RFP/RFQ, project approach, available resources, and other pertinent areas that would distinguish them. Interviews will be held at a City of Oakland office (exact location to be determined).

2) Overall Rating Criteria: The following specific criteria and the points for each criterion, for a total of 100 points, will be used in evaluating and rating the short-listed firms:

a) Presentation.....40 points (Scoring criteria is similar to that of the proposal criteria.)

- Relevant Experience
- Qualifications.
- Organization.
- Approach.
- Other Factors

b) Request for Proposal Submittal:.....25 points

- Total points from the initial review of proposals will be allocated proportionally based on a maximum allowance of 20 points

c) Interview / Questions:.....35 points

Overall Rating Criteria: The following specific criteria and the points for each criterion, for a total of 100 points, will be used in evaluating and rating the short-listed firms. The City anticipates the tentative schedule of events to be as follows:

Only those proposers meeting the relevant experience will be invited for interviews.

3) The City anticipates the tentative schedule of events to be as follows:

- Distribution of RFP/RFQ August 24, 2017
- Pre-proposal Meeting 3:00 P.M., August 31, 2017
- Submission of RFP/RFQ September 25, 2017
- Evaluation of Proposals & Ranking week of September 25, 2017
- Notification of Interviews TBD
- Interviews TBD
- Notification of Selection TBD

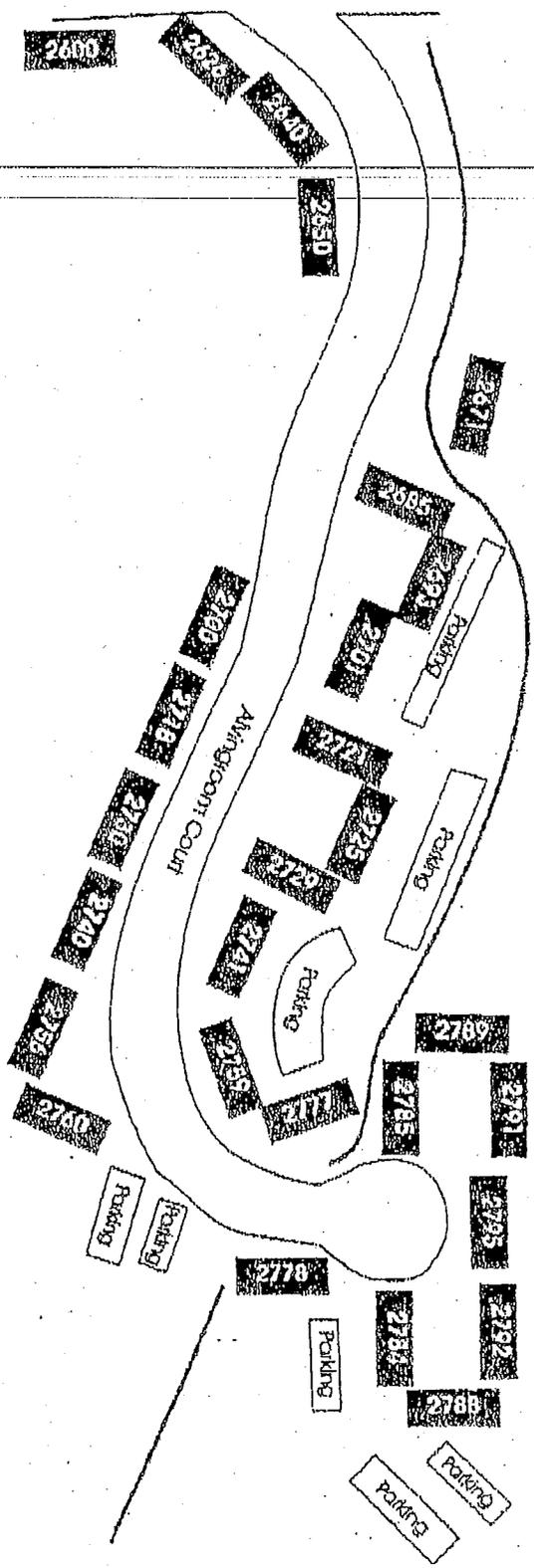
**G. NEGOTIATIONS AND AWARD- SUBJECT TO CHANGE**

1. The completion of this evaluation process will result in the proposers being numerically ranked. The proposer ranked first will be invited to participate in negotiations. Should the City and the first ranked proposer not be able to reach an agreement as to the terms within a reasonable timeframe, the City may terminate the negotiations and begin negotiations with the proposer that is next in line.
2. Upon successful completion of the negotiations, the Director of DHCD will make the final owner/developer selection.
3. The selected proposer and its other members will be required to maintain auditable records, documents, and papers for inspection by authorized local, state and federal representatives. Therefore, the proposer and its other members may be required to undergo an evaluation to demonstrate that the proposer uses recognized accounting and financial procedures.

END OF RFP/RFQ

**Gatewood Apartments**  
**2700 Alvingroom Court**  
**Oakland, California**

**SITE PLAN**



The information herein is based on data provided to MCB Commercial by the applicant. MCB Commercial does not warrant the accuracy or completeness of the information. The information is provided for your information only and should not be used as a basis for any decision. MCB Commercial is not responsible for any errors or omissions in this plan. The information is provided for your information only and should not be used as a basis for any decision. MCB Commercial is not responsible for any errors or omissions in this plan.

