

STATE OF HAWAII
DEPARTMENT OF HAWAIIAN HOME LANDS

Land Development Division

MAR 24 2016

Date

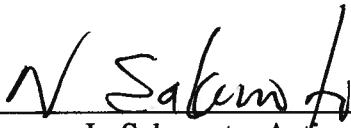
**ADDENDUM NO. 2
TO
REQUEST FOR PROPOSALS**

**RFP-16-HHL-004
HAWAIIAN HOME LANDS RENTAL HOUSING IN THE VILLAGES OF LAIOPUA**

Notice to All Prospective Offerors

This addendum is hereby made a part of the contract documents for the Hawaiian Home Lands Rental Housing in the Villages of Laiopua, RFP-16-HHL-004, and it shall amend the said contract documents as detailed within this Addendum document.

APPROVED:



Norman L. Sakamoto, Acting Administrator
Land Development Division
Department of Hawaiian Home Lands

Please execute and immediately return the receipt below to the Department of Hawaiian Home Lands via facsimile to: **(808) 620-9299, Mr. Stewart Matsunaga, Master Planned Community Development Manager, Land Development Division.**

Receipt of Addendum No. 2 for Hawaiian Home Lands Rental Housing in the Villages of Laiopua, Request for Proposals No.: RFP-16-HHL-004, is hereby acknowledged.

Print: _____
(Name)

(Title)

Name of Firm/Company

Date

ADDENDUM NO. 2

RFP NO.: RFP-16-HHL-004

HAWAIIAN HOME LANDS RENTAL HOUSING IN THE VILLAGES OF LAIOPUA

INCLUSIONS

This Addendum No. 2 shall incorporate the following amendments to RFP-16-HHL-004:

1. Responses to Questions (Addendum 2; RFP-16-HHL-004)
2. Revised 'Section 3' (Sec. 3.1 to 4.2)- Proposal Requirements & Evaluation Criteria
3. Page Spacer for Transmittal Letter (RFP-16-HHL-004)
4. Revised 'Offer Form OF-1'; Proposal Instructions
5. Revised 'OFFER FORM OF-1A'; Developer's Application & Qualification
6. Revised 'OFFER FORM OF-2'; Project Outline
7. Revised 'OFFER FORM OF-3'; Other Housing
8. Basic Instructions for Packaging Proposals

ADDENDUM 2
RFP-16-HHL-004

RESPONSES TO QUESTIONS:

Question #1:

As it relates to “The successful Offeror shall prepare a rental management process and management handbook, manage or cause the management of the rental program, oversee the on-going financial capability of the tenants and develop any programs to enhance the tenants’ ability to purchase their unit”, will the financial institution that prepares the handbook be able to provide mortgages to the renter/tenant under the rent-to-own program and not merely only providing financial education and counseling?

Response:

The Offeror shall describe the take out financing qualification process and the provision of mortgages for qualified tenants under this Request for Proposals. Who provides the financial education and counseling is Offeror’s choice; this shall also be described in Offeror’s proposal.

Question #2:

Laiopua Village 5 As-built construction plans could not be opened.

Response:

Laiopua Village 5 As-built construction plans are provided through the following link:
<https://akinaka.sharefile.com/d-s32d2db7402e4540a>

Question #3:

Please confirm that Addendum #1’s instructions regarding the basic instructions for packaging the RFP supercedes the organization and table of contents requirements of the original RFP.

Response:

See attached- Revised Section 3 and Offer forms

SECTION THREE

PROPOSAL REQUIREMENTS AND EVALUATION CRITERIA

Offeror's proposal shall describe in detail the Offeror's ability and availability of services to meet the goals and objectives of this RFP and specifically the **SCOPE OF WORK** in **Section Two of this RFP**. When an interested Offeror submits a proposal, it shall be considered a complete plan for accomplishing all the work specified in the RFP. The Offeror's proposal must demonstrate an understanding of and the ability to meet and perform all contractual requirements listed in the RFP. Offeror shall submit a proposal that includes an overall strategy, timeline and plan for accomplishing the work proposed as well as any expected results and potential shortfalls.

Proposals submitted in response to this RFP will be evaluated in accordance with the following Proposal Requirements and Evaluation Criteria. **INCLUDE A "TABLE OF CONTENTS" AND ORGANIZE YOUR PROPOSAL IN THE FOLLOWING ORDER, AS ADDRESSED IN THIS SECTION:**

- 3.1 Transmittal Letter
- 3.2 Offer Form (**OF-1**)
- 3.3 Offeror's Organizational Information (**OFFER FORM 1-A**)
- 3.4 Offeror's Financial Information
- 3.5 Offeror's Resume of General Experience in Real Estate Development
- 3.6 Offeror's Specific Experience Related to this RFP
- 3.6 Offeror's Project Outline, Understanding and Approach (**OFFER FORM-2**)
- 3.8 Additional Information and Confidential Information

All proposal requirements in this section must be addressed. **PROPOSALS THAT DO NOT INCLUDE ALL SECTIONS WILL BE DEEMED NON-RESPONSIVE TO THIS RFP AND WILL NOT BE CONSIDERED FOR AWARD.**

3.1 PROPOSAL TRANSMITTAL LETTER

Provide a one- to two-page transmittal letter that summarizes Offeror's proposal and confirms that the Offeror shall comply with the requirements, provisions, terms, and conditions specified in this RFP. The transmittal letter should be in the form of a standard business cover letter on official business letterhead and signed by an authorized representative of Offeror.

If subcontractors will be used, append a statement to the transmittal letter from each subcontractor signed by an individual authorized to legally bind the subcontractor and stating, in addition to the paragraph above:

- 1. The general scope of work to be performed by the subcontractor; and
- 2. The subcontractor's willingness to perform the indicated work for DHHL in accordance with the RFP.

3.2 OFFER FORM (OF-1)

Provide a signed Attachment 1, Offer Form OF-1, with the complete name and address of Offeror's firm and the name, mailing address, telephone number, and fax number of the person the State should contact regarding the Offeror's proposal.

**3.3 OFFEROR'S ORGANIZATIONAL INFORMATION (10 POINTS)
(Section 1, OFFER FORM 1-A DEVELOPER'S APPLICATION AND QUALIFICATION FORM)**

a. Legal Entity

Identify the legal entity constituting the developer that will execute and be bound by the terms and conditions of the Development Agreement and any other Contract resulting from this RFP.

b. Developer Description

Provide an accurate description of the developer, including narrative and quantitative metrics such as number of employees, dollar volume per year, and office locations, among other descriptive information.

c. Development Team

Identify the development team members, including any major consultants, who will be involved in the planning and implementation of the development. The consultants identified may include, but not necessarily be limited to, design architect and planners, economic / financial analysts, engineers, contractors, and legal counsel. Include resumes and current contact information, including email, phone number, and physical address for each proposed team member.

d. Team Roles

Identify the roles and submit resumes for the project manager and key individuals who will be involved in the development, implementation, and operation of the development.

Evaluation Criteria: The selection committee will review for a complete description of the legal developer entity and the development team members.

**3.4 OFFEROR'S FINANCIAL INFORMATION (15 POINTS)
(Section 2. OFFER FORM 1-A)**

Please note that DHHL will maintain the confidentiality of all financial information provided by Offerors as a part of this RFP process. Offerors shall provide proprietary financial information under separate cover, as specified in Section 1.13.

a. Summary of Financial Capacity

Provide a description of developer's financial capacity and backing, including general financial capabilities and partnerships. Describe the developer's need for and ability to raise equity and additional capital sources. Describe how pre-development costs will be funded.

Include Items 1(a) to (h) on Section 2: Financial Information (Offer Form 1-a)

**3.5 OFFEROR'S RESUME OF GENERAL EXPERIENCE IN REAL ESTATE DEVELOPMENT (10 POINTS)
(Section 3. OFFER FORM 1-A)**

In order to demonstrate access to equity capital and financing resources to carry out entitlement and development of the property, provide the information indicated below.

1. Composition of current real estate portfolio.
2. Recent history (last five to seven years) in obtaining financing commitments, including type of project, financing source, and amounts committed.
3. Projects in pipeline, including status, development schedule and financial commitment required of developer, a description of project financing methods, sources, and amounts. Indicate any working relationship on other projects with members of the development team proposed for this Project.

4. Specific sources of debt/equity capital that may be used for this project, including relationship to the developer (outside lender, parent company, etc.) and contact information.
5. Adverse actions taken by any funding sources or financial institutions against the developer or joint venture partner, such as terminating or restricting the use of funds anytime during the past five years, if any.
6. Litigation in which developer (and any related affiliated entries) is involved or settled litigation over the last five years, if any.

3.6 OFFEROR'S SPECIFIC EXPERIENCE RELATED TO THIS RFP – 30 POINTS

3.6.1 Overview.

Provide an overview of Offeror's history and experience in developing affordable housing and homeownership opportunities. Identify your experience in working with federal programs, including the NAHASDA, CDBG or HOME program. Offerors must demonstrate an ability to compete for and access Low Income Housing Tax Credits.

3.6.2 Past Experience

Provide relevant examples of projects with similar development challenges that are in completion or have been successfully completed by Offeror. For each project identified, please provide the following information:

1. Project name and type.
2. Locations, including addresses, and photographs.
3. Size, mix of uses, and anchor tenants, if applicable.
4. Development timeline (from developer selection/site control to completion of construction, indicating phasing as relevant).
5. Project cost, capital and financing sources used, and indications of economic performance.
6. General description including role of development team and key project personnel, unique challenges of project, occupancy and history.
7. Identification of developer and explanation if different from the proposed developer for the property.

3.6.3 Development Team Members' Experience

Please provide relevant experience of the development team members. Provide no more than three projects per team member. Provide information including the project name, location, description, services provided, dates of service, and outcome of work effort. These projects may be the same as those submitted in response to the second paragraph of this section 3.5.

3.6.4 References

Please provide at least five (5) references for Offeror, including public and private entities.

Please note that DHHL reserves the right to evaluate references other than those provided in Offeror's proposal.

Evaluation Criteria: The selection committee will evaluate the experience of the Offeror as a developer and the experience of the specific personnel and consultants proposed by Offeror for assignment to this project. Specifically, the selection committee will base its assessment of Offeror on the following:

- **Public-private development.** Proven ability to work with a public agency landowner toward a project that contributes to the agency's mission as well as reflecting sound private sector development practices.

- **Community appeal.** Demonstrate experience creating projects that establish a “place” within a broader community that draws in residents, workers, and visitors from around the project site.
- **Involvement with public outreach process.** Proven ability to successfully execute a public outreach strategy, including working with community organizations, public agencies, and regulatory bodies, elected officials, and members of the public to develop an acceptable development program.
- **Development team members’ experience.** While the experience of the Offeror as a developer is most important, the selection committee will also evaluate proposed development team members’ experience. Team members with relevant project experience will be judged most qualified to accomplish the scope specified in the RFP.
- **References.** The selection committee will evaluate the references provided. These references will be contacted and may be interviewed or surveyed by DHHL or its representatives. Inquiries will be related to the Offeror’s performance in successfully planning, funding, and financing, entitling, and developing similar developments.

3.7 OFFEROR’S PROJECT OUTLINE, UNDERSTANDING AND APPROACH (35 POINTS) (OFFER FORM OF-2)

3.7.1 OFFEROR’S PROJECT OUTLINE

Provide narratives and any supporting documents, samples, diagrams, drawings, specifications, renderings included in Offer Form-2, Project Outline.

Include a “Sources and Uses” budget detailing how the proposed development will be financed. The project proforma shall show how funding is stacked and identify proposal assumptions and requirements asked of the State .

- **Sources:** Indicate the types of financial assistance to be used to complete the proposed development, plus any other types of financial assistance to be used. Provide documentation to support the commitment of these funds. If funds are not available to the project at the time of application submittal, please identify when you will apply for the identified funds. Also, please identify when the commitment may be expected.
- **Uses:** Provide an estimated budget for the acquisition, rehabilitation, and disposition of foreclosed homes (including soft costs such as developer fees, realtor fees, appraisals, inspections, marketing, carrying costs, etc.).
- **Developer fee:** Indicate the proposed developer fee, and all other fees proposed to be earned by affiliates of the developer, for each unit developed under this RFP.

Discuss the risks and benefits of Offeror’s financing proposal and describe why Offeror’s proposed financing strategy is the most advantageous to DHHL.

Evaluation Criteria: The selection committee will evaluate Offeror’s demonstration of a credible ability to provide adequate funds for a purchase or raise or finance all costs, including pre-entitlement and other development costs. Financial strength and feasibility will be assessed on the basis of:

- **Strong financial standing and history.** Successful offerors will have a developer with a strong financial record.
- **Successful financing of comparable projects.** Responses including a description of how projects have been successfully funded (including pre-development costs) and equity raised on similar projects will receive higher scores.

- **Commitment of Funds.** Letters of support and other documentation showing the commitment of funds to this project.

3.7.2 PROJECT UNDERSTANDING AND APPROACH

- **Physical and Market Context and Development Opportunities and Constraints**

Describe the key opportunities and constraints, as seen by Offeror from a market and planning perspective, and Offeror's experience addressing such issues or opportunities on past projects.

- **Regulatory, Political and Community Context**

Summarize Offeror's understanding of the regulatory, political, and community context, including the key milestones or achievements that will help to achieve a successful project.

- **Approach to Developing a Plan**

Summarize the Offeror's understanding of the process required for development of the property. Describe in detail Offeror's plan for undertaking that process and ensuring successful completion of the development. Include examples from the projects described in Offeror's response to the second paragraph of 3.5 above to illustrate successful strategies applied in previous planning efforts.

Include a specific timeline detailing the steps from start to completion of the development and the time required at each interval.

Evaluation Criteria: The selection committee will evaluate responses to determine the extent to which a viable approach to generating a development plan for the property is articulated. Specifically, what types of units are appropriate for the property and under what conditions? How will the Offeror determine the appropriate mix and scale of development? How will Offeror work with DHHL to advance mutual interests? How will public outreach to community members and agencies be conducted? In addition, proposals which provide housing opportunities to applicants who qualify with incomes are lower than 80 percent area median incomes will be provided additional evaluation consideration.

- **Conditions and Exceptions**

(Proposal Requirement, *if applicable*)

Offeror shall list any exceptions taken to the terms, conditions, specifications, or other requirements listed herein. Offeror shall reference the RFP section where exception is taken, describe the exception taken, and provide a proposed alternative, if any.

Offeror initially should seek an informal resolution of any exceptions taken by notifying the RFP Contact in writing prior to the Deadline for Questions and Clarifications. Offeror's notice shall reference the RFP section where exception is taken, describe the exception taken, and provide a proposed alternative, if any. If Offeror's exception has not been resolved by the date on which proposals are due, Offeror shall include said exception in its proposal in accordance with the aforementioned provision.

3.8 ADDITIONAL INFORMATION AND CONFIDENTIAL INFORMATION

(Proposal Requirement, *if applicable*)

Any additional forms or information required or requested in the RFP and not specifically addressed in Section Three shall be marked appropriately and included at the end of the proposal. For instance, Offeror's HCE Certificate of Vendor Compliance and insurance certificates would be included in this section.

Any “Confidential” information shall be enclosed in an envelope marked with RFP number, subject matter and labeled as “Confidential”.

SUMMARY OF MANDATORY REQUIREMENTS (EVALUATION CRITERIA) AND PROPOSAL REQUIREMENTS	
MANDATORY REQUIREMENTS (EVALUATION CRITERIA)	MAX POINTS PER CRITERION
<input type="checkbox"/> Organizational Background (Offer Form 1-A)	10 Points
<input type="checkbox"/> Financial Information	15 Points
<input type="checkbox"/> General Experience in Real Estate Development	10 Points
<input type="checkbox"/> Specific Experience Related to this RFP	30 Points
<input type="checkbox"/> Project Outline, Understanding and Approach (Offer Form 2)	35 Points
Total Available Points	100 Points
OTHER PROPOSAL REQUIREMENTS	
<input type="checkbox"/> Transmittal Letter	Not Scored
<input type="checkbox"/> Offer Form OF-1	Not Scored
<input type="checkbox"/> Confidential Information, if applicable	Not Scored
<input type="checkbox"/> Exceptions, if applicable	Not Scored
<input type="checkbox"/> Additional Information, as required or requested	Not Scored

SECTION FOUR

PROPOSAL FORMAT AND SUBMISSION

4.1 PROPOSAL FORMAT

Guidelines for formatting proposals:

- a. Proposal includes a one-page transmittal letter as the first page of the proposal.
- b. Proposal includes the Offer Form in Attachment 1 as the second page of the proposal.
- c. Proposal includes all content specified in Section Three in the order presented therein.
- d. Proposal pages may be double-sided.
- e. Proposal is prepared simply and economically, and is comprised of recyclable and recycled materials. Proposal is submitted in a 3-ring binder, not stapled, not bound and tabbed according to the Section 3..
- f. There is no page limit restriction on proposals.

Please do not include sales or promotional materials as part of the proposal unless requested.

Economy of Presentation. Proposals shall be prepared in a straightforward and concise manner, in a format that is reasonably consistent and appropriate for the purpose. Emphasis will be on completeness and clarity and content. If any additional information is required by the State regarding any aspects of the Offeror's proposal, it shall be provided within five (5) working days.

4.2 PROPOSAL SUBMISSION

All proposals submitted in response to this RFP are subject to the terms and requirements of this RFP. All matters not specifically addressed in this RFP, or a subsequent contract entered into as a result of this RFP, will be governed by the Hawaii Administrative Rules as well as applicable Hawaii Revised Statutes and other rules pertaining to procurement and contracting.

Provide one (1) original hardcopy proposal marked "ORIGINAL" and five (5) copies of the original marked "COPY" in a sealed envelope or box to RFP Contact and address, as described above.

It is imperative to note that the Offeror must submit only one original and the required number of copies. **DO NOT SUBMIT MORE THAN ONE ORIGINAL.**

The sealed envelope or box containing proposals will have the following information provided on the outside of the package:

- a. RFP title
- b. RFP number
- c. Offeror name
- d. Offeror address

It is the Offeror's sole responsibility to ensure that its proposal is delivered and time-stamped at the location above prior to the Proposal Due date in Section One, as amended. Proposals not time-stamped at the location above by the Proposal Due date will be considered late and shall not be considered for award.

Proposals which are incomplete and not responsive to required portions of the RFP may be deemed unacceptable. Unacceptable proposals shall not be considered for award.

Proposals shall be submitted using Offeror's exact legal name as registered with the Department of Commerce and Consumer Affairs, if applicable; and indicate exact legal name in the appropriate spaces on Offer Form page OF-1. Failure to do so may delay proper execution of the contract. See Attachment 1.

The authorized signature on the first page of the Offer Form shall be an original signature in ink. If unsigned or the affixed signature is a facsimile or a photocopy, the offer shall be automatically rejected unless accompanied by other material, containing an original signature, indicating the Offeror's intent to be bound.

A proposal security is NOT required for this RFP.

Offeror is encouraged to submit typewritten offers. If handwritten, it should be clearly printed. Offeror is cautioned that illegible offers of any item(s) may be automatically rejected to avoid any errors in interpretation by the reviewers during the evaluation process.

RFP-16-HHL-004

PROPOSAL TRANSMITTAL LETTER

**OFFER FORM
OF-1**

HAWAIIAN HOME LANDS RENTAL HOUSING IN THE VILLAGES OF LAIOPUA

RFP-16-HHL-004

Honorable Jobie M. K. Masagatani, Chairman
Hawaiian Homes Commission
Department of Hawaiian Home Lands
State of Hawaii
Honolulu, Hawaii 96813

Dear Chairman Masagatani:

The undersigned has carefully read and understands the terms and conditions specified in the Request for Proposals, the General Conditions, and DHHL Construction General Conditions by reference made a part hereof; and hereby submits the following offer to perform the work specified herein, all in accordance with the true intent and meaning thereof. The undersigned further understands and agrees that by submitting this offer, 1) he/she is declaring his/her offer is not in violation of Chapter 84, Hawaii Revised Statutes, concerning prohibited State contracts, and 2) he/she is certifying that the price(s) submitted was (were) independently arrived at without collusion.

Offeror is:

Sole Proprietor Partnership *Corporation Joint Venture

Other _____

*State of incorporation: _____

Hawaii General Excise Tax License I.D. No. _____

Federal I.D. No. _____

Payment address (other than street address below): _____
City, State, Zip Code: _____

Business address (street address): _____
City, State, Zip Code: _____

Respectfully submitted:

Date: _____

(x) _____
Authorized (Original) Signature

Telephone No.: _____

Name and Title (Please Type or Print)

Fax No.: _____

E-mail Address: _____

** _____
Exact Legal Name of Company (Offeror)

**If Offeror is a "dba" or a "division" of a corporation, furnish the exact legal name of the corporation under which the awarded contract will be executed.

**HHL RENTAL HOUSING
IN THE VILLAGES OF LAIOPUA**

RFP-16-HHL-004

OFFER FORM 1A

DEVELOPER'S APPLICATION AND QUALIFICATION FORM

OFFEROR'S ORGANIZATIONAL INFORMATION

a. Legal Entity

_____	_____
Responsible Managerial Employee (RME) /Title	RME's E-mail Address
_____	_____
RME's Address	RME's Telephone No.
_____	_____
City, State, Zip Code	RME's Facsimile No.

List of Corporate Officers and Directors or Individual Partners, Joint Ventures or Owners

Name: _____	Name: _____
Title: _____	Title: _____
Telephone No.: _____	Telephone No.: _____
Address: _____	Address: _____
_____	_____
Name: _____	Name: _____
Title: _____	Title: _____
Telephone No.: _____	Telephone No.: _____
Address: _____	Address: _____
_____	_____
Name: _____	Name: _____
Title: _____	Title: _____
Telephone No.: _____	Telephone No.: _____
Address: _____	Address: _____
_____	_____

NOTE: Please attach separate page if more space is needed. Should any information change during the proposal evaluation, selection, and award process, it is the responsibility of the applicant to update DHHL in writing of such changes.

Corporate Shareholders Holding 25% or More of the Outstanding Shares:

Name: _____
 Title: _____
 Telephone No.: _____
 Address: _____

Name: _____
 Title: _____
 Telephone No.: _____
 Address: _____

Name: _____
 Title: _____
 Telephone No.: _____
 Address: _____

Name: _____
 Title: _____
 Telephone No.: _____
 Address: _____

b. Developer Description

c: Development Team

	Company/ Address	Contact Person/ Telephone No.
Developer		
Architect		
Civil Engineer		
House Contractor <u>(if different from above)</u>		
Financing		
Sales		

Legal		
Other (specify – attach additional sheets if necessary)		

d. Team Roles

OFFEROR'S FINANCIAL INFORMATION

Note: Financial information submitted to DHHL shall be kept confidential and shall not be considered as a public record as defined in Chapter 92, Hawaii Revised Statutes. Financial information shall not be released without the express written consent of the applicant.

1. Proposals shall include the following:
 - (a) If applicable, a certified copy of the Articles of Incorporation.
 - (b) If applicable, a certified copy of the By-Laws.
 - (c) If applicable, a certified copy of the Corporation Resolution which authorizes the applicant and borrowing or guaranty, if applicable.
 - (d) If applicable, a certified copy of the Partnership Certificate.
 - (e) If applicable, a certified copy of the Joint Venture Agreement.
 - (f) If applicable, a description of any financial default, modification of terms and conditions of financing to avoid default, or legal actions taken or pending against the applicant and borrowing and guaranteeing entities and their principals.
 - (g) One of the following:
 - 1) The two most recent audited annual financial statements;
 - 2) A statement of financial net worth; or
 - 3) A statement of bonding capacity.
 - (h) Certification that the Offeror is not in default or has failed to perform under any contract, agreement, development or design-build agreement, or lease with the State of Hawaii, and does not have any outstanding judgments.

OFFEROR'S RESUME OF GENERAL EXPERIENCE IN REAL ESTATE DEVELOPMENT

The applicant must meet the following criteria:

A principal member of the Offeror's company must have at least five (5) years of real estate development experience; and a member of the Offeror's company who is responsible for day to day operations must have been materially involved in the development of at least three (3) separate projects with at least one project consisting of fifty (50) or more units.

Please attach a description of the Offeror's company experience which supports the foregoing requirement and which includes the following information:

- A. A list of housing projects developed;
- B. The role of the applicant in developing the listed housing projects;
- C. A brief description of the housing projects;
- D. If applicable, a description of all housing projects or facilities owned and operated by the applicant;
- E. If applicable, a statement of the applicant's past or current involvement with the Department of Hawaiian Home Lands (DHHL), Hawaii Housing Finance and Development Corporation (HHFDC), and/or the Hawaii Public Housing Authority (HPHA). Include a description of any assistance received from DHHL, HHFDC, and/or HPHA.
- F. If applicable, a statement of the applicant's past or current involvement with the application and implementation of housing development using Low Income Housing Tax Credit financing, various affordable housing grant programs, NAHASDA funds, Rental Housing Trust Fund, and/or any other sources of private or public financing.

OFFEROR'S SPECIFIC EXPERIENCE RELATED TO THIS RFP

Overview.

Provide an overview of Offeror's history and experience in developing affordable housing and homeownership opportunities. Identify your experience in working with federal programs, including the NAHASDA, CDBG or HOME program. Offerors must demonstrate an ability to compete for and access Low Income Housing Tax Credits.

Past Experience

Provide relevant examples of projects with similar development challenges that are in completion or have been successfully completed by Offeror. For each project identified, please provide the following information:

- 1. Project name and type.
- 2. Locations, including addresses, and photographs.
- 3. Size, mix of uses, and anchor tenants, if applicable.
- 4. Development timeline (from developer selection/site control to completion of construction, indicating phasing as relevant).

5. Project cost, capital and financing sources used, and indications of economic performance.
6. General description including role of development team and key project personnel, unique challenges of project, occupancy and history.
7. Identification of developer and explanation if different from the proposed developer for the property.

Development Team Members' Experience

Please provide relevant experience of the development team members. Provide no more than three projects per team member. Provide information including the project name, location, description, services provided, dates of service, and outcome of work effort. These projects may be the same as those submitted in response to the second paragraph of this section 3.5.

References

Please provide at least five (5) references for Offeror, including public and private entities.

Please note that DHHL reserves the right to evaluate references other than those provided in Offeror's proposal.

Evaluation Criteria: The selection committee will evaluate the experience of the Offeror as a developer and the experience of the specific personnel and consultants proposed by Offeror for assignment to this project. Specifically, the selection committee will base its assessment of Offeror on the following:

- **Public-private development.** Proven ability to work with a public agency landowner toward a project that contributes to the agency's mission as well as reflecting sound private sector development practices.
- **Community appeal.** Demonstrate experience creating projects that establish a "place" within a broader community that draws in residents, workers, and visitors from around the project site.
- **Involvement with public outreach process.** Proven ability to successfully execute a public outreach strategy, including working with community organizations, public agencies, and regulatory bodies, elected officials, and members of the public to develop an acceptable development program.
- **Development team members' experience.** While the experience of the Offeror as a developer is most important, the selection committee will also evaluate proposed development team members' experience. Team members with relevant project experience will be judged most qualified to accomplish the scope specified in the RFP.
- **References.** The selection committee will evaluate the references provided. These references will be contacted and may be interviewed or surveyed by DHHL or its representatives. Inquiries will be related to the Offeror's performance in successfully planning, funding, and financing, entitling, and developing similar developments.

OFFEROR'S PROJECT OUTLINE, UNDERSTANDING AND APPROACH OFFER FORM-2

OFFER FORM OF-2

**HAWAIIAN HOME LANDS RENTAL HOUSING IN THE VILAGES OF LAIOPUA
RFP-16-HHL-004**

Project Outline

- A. Project Feasibility and Financing Model
- B. Project Schedule and Milestones
- C. House Construction Program
- D. Marketing and Rent-up Program
- E. Rental Management Program
- F. Applicant/Renter Financial Enhancement Program
- G. Lease Conversion Program
- H. Legal Issues
- I. Conditions / Exceptions

**HAWAIIAN HOME LANDS RENTAL HOUSING IN THE VILAGES OF LAIOPUA
RFP-16-HHL-004**

**Proposal for Other Housing Opportunities, including but not limited to Turnkey, Self-Help
and other Rental Housing types.**

Table of Contents

Basic Instructions

A. Schedule

B. House Plans and General Outline Specifications

C. Warranty Program

D. Financing

E. Green Building

F. Schedule

G. Conditions / Exceptions

A. PRICING SCHEDULE

Offeror shall provide the cost estimate of each model "turnkey"/completed, vertical as well as lot improvements (including, but not limited to landscaping, driveway, utility connections, and rear and side fences. Cost estimates will include breakdown of profit and overhead per each model.

Offeror shall identify the minimum and maximum mix for the number of single-family units proposed.

The Contractor shall be responsible for compliance with Chapter 104, HRS, for the payment of minimum prevailing wages to mechanics and laborers employed on the Project for the corresponding work classifications as determined by the Department of Labor and Industrial Relations.

It is intended that gross income derived from the construction of all housing units will be certified for exemption from Hawaii General Excise Taxes pursuant to Section 201G-116 H.R.S. The proposed house prices shall not include any provision for GET.

Units by type and proposed price:

Model	Bedrooms	Bath-rooms	No. of Stories	Area (square feet)			Proposed Price
				Net Living	Carport	Patio/Lanai	
A	2						\$
B	2						\$
C	3						\$
D	4						\$
E	5						

Optional Standard Features. These items will not be factored in the scoring of proposals, but may be included by DHHL in the final house package offered to the beneficiaries, or offered to prospective buyers as optional up-grades:

Feature	Model	A	B	C	D	E
Enclosed Garage, including electronic roll-up door		\$	\$	\$	\$	\$
Rain Gutters		\$	\$	\$	\$	\$
Irrigation Catchment System		\$	\$	\$	\$	\$
Fire-protection Sprinkler System		\$	\$	\$	\$	\$
Ceiling Fans		\$	\$	\$	\$	\$

Central air conditioning	\$	\$	\$	\$	\$
2 kW Photovoltaic system	\$	\$	\$	\$	\$

[other –add pages if necessary]

Options (Home-buyer consideration): These items will not be factored in the scoring of proposals, but would be offered to prospective buyers at the indicated prices:

Options	Model	A	B	C	D	E
Refrigerator		\$	\$	\$	\$	\$
Upgrade carport to enclosed garage with remote garage door opener.		\$	\$	\$	\$	\$
Flooring Upgrade		\$	\$	\$	\$	\$
Washer/ Dryer		\$	\$	\$	\$	\$
Cabinetry Upgrade		\$	\$	\$	\$	\$
Landscape Irrigation		\$	\$	\$	\$	\$

[other –add pages if necessary]

Cost Breakdown for Basic Models Without Options

Model	Materials	Labor	Overhead	Profit	Proposed Price
A	\$	\$	\$	\$	\$
B	\$	\$	\$	\$	\$
C	\$	\$	\$	\$	\$
D	\$	\$	\$	\$	\$
E	\$	\$	\$	\$	\$

ADA and DCAB regulations do not permit assessment of a surcharge to install options for accessibility. If the basic house design is not ADA-compliant, a contingency amount should be included in all house costs should buyer(s) require installation of accessible features.

HAWAII PRODUCTS PREFERENCE

(Refer to Section 6.2 a. of the RFP)

DESIGNATION OF HAWAII PRODUCTS TO BE USED		
Description	Manufacturer	Cost FOB Jobsite
		\$ _____
		\$ _____
		\$ _____
		\$ _____
		\$ _____
		\$ _____
		\$ _____
		\$ _____
		\$ _____
		\$ _____
		\$ _____
		\$ _____
		\$ _____
		\$ _____
		\$ _____

It is further understood by the Offeror that if upon being granted Hawaii Products, and being awarded the contract, if the Offeror fails to use such products or meet the requirements of such preference, the Offeror shall be subject to penalties, if applicable.

APPRENTICESHIP AGREEMENT PREFERENCE

(Refer to Section 6.2 b. of the RFP)

The offeror hereby certifies that it will employ the following apprenticeable trades to perform the work for this project:

TRADE	APPRENTICESHIP PROGRAM SPONSOR

(Add additional sheets if necessary)

B. HOUSE PLANS AND OUTLINE SPECIFICATIONS

Offeror shall submit conceptual house plan renderings and outline specifications for four house models. "Off the shelf" plans are acceptable. HUD, USDA, NAHASDA, and Villages of Laiopua design guidelines shall be followed in the design and construction of the homes. Offeror may highlight any special design features incorporated into its proposal.

The selected Offeror will be required to submit Composite Plot Plans showing the location of the house and driveway relative to the property lines, finish floor elevations, fine grading, including individual lot swales around the house for proper drainage toward the adjacent street or drainage structure and detailed schematic plans and outline specifications.

Offerors may provide schematic plans and outline specifications for a minimum of proposed single family units. Schematic plans shall include floor plans and elevations at a scale of 1/4" = 1'0". Outline specifications shall include preliminary information on the following items:

1. Foundation (including termite treatment)
2. Framing (including termite treatment)
3. Roofing
4. Partitions
5. Interior Wall Finishes
6. Exterior Wall Material & Finishes
7. Ceiling Finishes
8. Carpeting & Floors
9. Doors & Windows
10. Cabinetry
11. Fixtures & Appliances
12. Garage/Carport
13. Special Features (if any)

House plans shall be attached to Section III of the Proposal. Mark each sheet "Model A", "Model B", etc. In addition to the drawings submitted with the proposal, please submit one extra set of drawings (unfolded), and a reduced black and white version of all drawings in an 11" x 17" format.

C. WARRANTY PROGRAM

Provide a brief description of the proposed warranty program, including:

1. Ground Soil Treatment
2. Defective Materials and Workmanship
3. Treatment of Structural Lumber
4. Appliances
5. Roofing Material
6. Common Area Landscaping and Maintenance
7. Infrastructure
8. Others

D. FINANCING

Provide a DETAILED description of the proposed financing plan, including the following:

1. Sources of funds for construction.
2. Takeout financing for the interim loan.
3. Permanent financing that the Developer will provide to homebuyers, if any.
4. Grants or other financial assistance to be offered to applicants to rent and purchase their houses.

A letter of interest shall be provided by lending institution(s) acknowledging review of the Project as proposed by the Offeror and expressing interest in providing the proposed financing.

Please see the RFP regarding availability of the DHHL and/or NAHASDA funding. If proposing to utilize the DHHL and/or NAHASDA funds as interim construction financing, the deduction should be included in the house prices submitted in Section A. PRICING SCHEDULE.

E. GREEN BUILDING

DHHL has identified a minimum two star rating using the Hawaii BuiltGreen Self Certification Checklist as the desired baseline standard for all Contractor-built homes. Offerors shall submit a completed Hawaii BuiltGreen Checklist that shows prospective measures to be included in all Contractor-built homes to achieve or exceed this goal.

Solar water heaters are a required measure to be included in all proposals. The value of any State and/or Federal tax credits made eligible by the use of solar water heaters should be passed on to the home buyer.

Offerors shall also submit a brief (not to exceed one page) narrative justification for the green building approach and a separate, brief narrative on how the design will promote building orientation-related benefits. Please read Exhibit L “Green Building” for more information on Hawaii BuiltGreen; a list of preferred strategies; resources that support residential green building in Hawaii, and a copy of the Hawaii BuiltGreen Checklist.

Attach the completed Hawaii BuiltGreen Self-Certification Checklist.

F. SCHEDULE (at minimum, include the following milestones)

Notice to Proceed (Assume June 1, 2016)

Lot selection, contracting

Plans and permits approved

Start construction of first house

Start construction of last house

Finish construction of first house

Finish construction of last house

G. CONDITIONS / EXCEPTIONS

Provide a brief description of any special conditions that are contained in your proposal, whether relating to pricing, plans, designs, specifications, costs, warranties, schedule or other factors.

List any exceptions taken to the terms, conditions, specifications, or other requirements listed herein. Reference the RFP section where exception is taken, a description of the exception taken, and the proposed alternative, if any.

Basic Instructions for Packaging of Proposals

1. Please package your proposal in 3-ring binder.
2. Major sections of the proposal shall be identified by "Tabs".
3. Section I of the Proposal shall be "Offer Form OF-1" and "Offer Form OF-1A".
4. Section II of the Proposal shall be "Offer Form OF-2".
5. Section III of the Proposal, if applicable, shall be "Offer Form OF-3"; Other Housing
6. Section IV of the Proposal shall be exhibits. All drawings and exhibits to the proposal shall be neatly folded and clipped into the 3-ring binder.
7. Fill in all blank spaces with information requested; failure to provide all requested information may cause the proposal to be invalidated.
8. Please submit an original and five (5) copies of your proposal, for a total of six (6) sets.
9. An Offeror shall request in writing nondisclosure of information such as designated trade secrets or other proprietary data Offeror considers to be confidential. Such requests for nondisclosure shall accompany the proposal, be clearly marked, and shall be readily separable from the proposal in order to facilitate eventual public inspection of the non-confidential portion of the proposal.