

REQUEST FOR QUALIFICATIONS
FOR
STEUBENVILLE NORTH CHOICE NEIGHBORHOOD
REAL ESTATE DEVELOPMENT SERVICES

DUE DATE: March 1, 2024

5:00 p.m. (EDT)

Jefferson Metropolitan Housing Authority
815 6th Ave N # 100, Steubenville, OH 43952

ISSUE DATE: February 9, 2024

1. INVITATION

The Jefferson Metropolitan Housing Authority (JMHA) requests qualifications from professional developer(s) to partner with JMHA and the City of Steubenville to finalize and implement the housing element of the Steubenville North Choice Neighborhood Plan. Information on the Choice Neighborhood Plan can be found here: www.steubenvillechoice.com

Working with the team, the developer(s) will be expected to design for replacement housing units and other affordable and market-rate types; coordinate housing activities with residents, JMHA and City staff; and take the lead in securing local, state, federal, and private funding in support of the redevelopment efforts. Following completion of the Transformation Plan (December 2024), we intend to apply to the U.S. Department of Housing and Urban Development (HUD) for a FY 2025 Choice Neighborhood Implementation Grant (CNI).

JMHA will consider developers that clearly demonstrate knowledge of the Choice Neighborhood Implementation Grant, applicable HUD regulations and requirements. All qualifications packages must conform to requirements outlined herein. JMHA reserves the right to select the firms determined to be the most responsive and responsible, and in the judgment of JMHA that best meets its need for the specified task or tasks. JMHA further reserves the right to negotiate all terms of the contract(s), including price.

Developers must have extensive experience and financial resources to develop comprehensive housing. The successful developer must demonstrate the ability and experience to develop and implement a mixed-income, mixed-finance, mixed-use development, using various funding mechanisms such as Low-Income Housing (LIHTC) Tax Credits, New Market Tax Credits, HOME, CDBG, FHLB, etc.

Preference will be given to developers who have successfully completed similar and other HUD-related housing developments. Developers must be able to demonstrate that they have implemented and operated housing in comparable scope, scale and complexity to the housing component of the Plan. JMHA reserves the right, as co-developing partners for this project, to actively assist in the procurement of project architects, engineers, general service providers, and all major professional service consultants.

The selected developer(s) will be required to provide a narrative description of its development and operating budgets as acceptable to the Authority as a part of the process of negotiating an agreement. JMHA, as co-developer partner, will assist in the creation, maintenance and tracking of project budgets and financing throughout the entirety of the project phases.

Developers must be willing to comply with procurement requirements, relevant regulations, and any other applicable provisions of federal, state and local laws. The developer must not have any interest which would conflict with the performance of services required by this Request for Qualifications (RFQ).

2. BACKGROUND ON JMHA

The Jefferson Metropolitan Housing Authority (JMHA) is a political subdivision of the State of Ohio and was created by authority of the Ohio Revised Code. JMHA serves Jefferson County and was created in

1958. It is governed by a five member Board of Commissioners. Our Board Members serve five year terms upon appointment by local elected officials. JMHA operates and administers 662 units of Public Housing and administers 824 Housing Choice Vouchers. JMHA is committed to promote adequate and affordable housing, economic opportunity, and a suitable living environment free from discrimination.

3. PROGRAM GOALS

JMHA has established the following program goals for the revitalization effort:

- a. Create a vibrant, safe, community of high-quality design that meets or exceeds industry standards, and that attracts and retains a broad income mix of residents;
- b. Create a sustainable, livable environment featuring a mixture of tenure that includes family and senior housing, rental and homeownership, residential and non-residential uses. Community facilities and commercial development elements will be determined in consultation between JMHA and Developer(s);
- c. Physically integrate the new development into the fabric of the Steubenville North community, respecting the local context and character of the surrounding neighborhood;
- d. Ensure a high percentage of existing residents can return to redeveloped properties;
- e. Create sustainable new development of high quality that meets or exceeds industry standards and incorporates state-of-the-art energy conservation and green practices;
- f. Maximize the leverage of public housing funds and minimize dependence on public housing resources through the creative use of the mixed-finance process, private financing, Low Income Housing Tax Credits, and other sources of financing and subsidies;
- g. Maximize economic development opportunity for public housing residents, residents and businesses of Steubenville, and women- and minority-owned businesses;
- h. Aggressively promote all phases of the program and ensure long-term financial stability of developments;
- i. The development of off-site replacement units is an option that the developer(s) can consider on properties owned by JMHA, the City, or the developer(s) in Steubenville North. Developers should be willing to assist JMHA and the City identify additional vacant and underutilized properties for acquisition;
- j. Promptly achieve milestones and deliver development products; and
- k. Comply with all applicable federal, state and local laws, regulations, policies, edicts, approval requirements, and court orders.

4. HOUSING DESCRIPTION

The Plan will be centered on the redevelopment of JMHA's John F. Kennedy Apartments and Elmer White Family Units, which includes 206 units of low-income housing in total. The CN Plan will seek to replace 100% of those housing units within the neighborhood as part of new mixed-income developments. In addition to the 206 JMHA units, we are anticipating approximately 294 additional affordable and market rate units, for a total of approximately 500 units overall.

John F. Kennedy Apartments

815 North 6th Avenue, Steubenville, OH

- 9-story high-rise
- Family property
- Constructed in 1966
- 150 units
 - 71% 1-bedroom
 - 21% 2-bedrooms
 - 7% studios
- 1.77 acres

Elmer White Family Units

900 block of North Sixth Avenue, 900 block of Sherman Avenue, and the 500 block of Franklin Avenue, Steubenville, OH

- Family Property
- Constructed in 1962-1966
- 56 units
 - 53% 3-bedroom
 - 47% 4-bedroom
- 4.78 acres

5. COMMUNITY DESCRIPTION

The Steubenville North neighborhood was selected for a Choice Neighborhood Planning Grant for a multitude of reasons, including the proximity of the two public housing facilities within the neighborhood, the demographics and exhibited need of the community, and the alignment with both the City's and JMHA's goals and priorities. A focus on the housing infrastructure, which is severely distressed and has not seen any revitalization since its founding in the 1960s and 1980s, alone could lift the bar for Steubenville North. Despite the challenges faced by the community, there is momentum and drive to create change for the residents of the community.

The 0.45-mile neighborhood is adjacent to Downtown Steubenville, with Washington Street acting as the divider between the two neighborhoods. The eastern edge of the neighborhood follows the shores of the Ohio River, the western edge is a heavily wooded hillside, and the northern edge roughly follows University Avenue. This area has an estimated population of 1,367 and the City of Steubenville has a population of 18,161 according to the 2020 Census.

The Steubenville North neighborhood has numerous strong assets, which will create a strong foundation for this Plan. The neighborhood has two schools, East Garfield Elementary and Steubenville High School, both of which are among the best in the state. There are 12 active religious organizations, the Sycamore Youth Center, and the Urban Mission which provide food, activities, and support for

families in the community. The North End Historic District contains a beautiful collection of historic homes along 4th Street. Steubenville North is within 1 mile of Franciscan University of Steubenville. Franciscan is a private university with an enrollment of 3,656 students as of fall 2022, including 2,602 students on campus, in 40 undergraduate and 8 graduate degree programs.

6. MARKET POTENTIAL

Real Estate Strategies, Inc. was hired to complete a residential market analysis for the Steubenville North area. The analysis, completed in October, 2023, indicates market support for mixed-income residential development in the neighborhood. RES estimates that potential primary market area rental demand over the seven-year Choice Neighborhood implementation time frame could be at least 50% higher than the replacement demand figure—approximately **500 rental units**. Because of its location relative to employment as well as the lack of competitive rental development elsewhere in the primary market area, it would be possible for a large-scale development effort in the CN to capture 80% to 90% of this estimated demand. Some of the major recommendations from the report include:

- The focus on one-bedroom units is responsive to the HISTA data as well as the reports of property managers that large numbers of households on their waiting lists are looking for this type of unit. It is also in response to projections of an increase in the senior population aged 65 and older.
- An age-restricted senior LIHTC building is a recommended part of the development program. There are 61 individuals aged 62+ currently living in JFK Apartments and Elmer White.
- Although immediately outside of the CN boundaries, the vitality of downtown Steubenville will impact the success of the housing strategy in the Steubenville North area. Consideration should be given to locating a component of mixed-income rental units in or near Downtown Steubenville.
- While it may be difficult to attract a full-service grocery store to the downtown area, every effort should be made to support fresh food retailers locating in areas convenient to the CN.
- Key features and amenities recommended for new residential units include kitchens with ranges, refrigerators, dishwashers, and garbage disposals. Although washer/dryer hookups are standard in this market; in-unit washers and dryers would be recommended at a minimum for any townhouse units or units with two or more bedrooms. Window blinds, security systems and off- street parking are also recommended.
- Market-rate homeownership units should be priced under \$200,000. A percentage of units should be reserved for affordable homeownership targeting households with incomes below 80% AMI with forgivable second mortgages to write down the cost to the household and encourage long-term owner-occupancy.

7. REGULATORY SUMMARY

The mixed-finance developments will be implemented under HUD's "Mixed Finance" Rule for public housing and HUD's "Subsidy Layering" Rule. The Mixed Finance Rule permits public housing authorities to: (i) allow the development of projects that include nonpublic housing units in addition to public housing units; (ii) enter into partnership or other arrangements with non-profit and for-profit private developers to own the mixed-finance development; and (iii) transfer operating and capital subsidies to

public housing units. In addition, the mixed-finance developments will be subject to HUD's Safe Harbor Standards and Total Development Cost Limits. [www.hud.gov/offices/pih/programs/ph/hope6/mfph/]

The mixed-finance developments will be subject to the jurisdiction of various governmental entities. JMHA owns the John F. Kennedy Apartments and Elmer White Family Units sites. Such ownership, however, is subject to restrictive covenants running to HUD, which has provided subsidies and other funding. By virtue of their locations, the sites are also subject to the City of Steubenville, Jefferson County, and State of Ohio codes, ordinances and laws.

Consistent with Presidential Executive Orders 11625, 12138 and 12432, and Section 3 of the HUD Act of 1968, JMHA will make efforts to ensure that small and minority-owned businesses, women's business enterprises, labor surplus area businesses and individuals or firms located in or owned in substantial part by persons residing in the area of the mixed-finance developments are used when possible.

8. SUBMISSION REQUIREMENTS

The instructions below provide guidance for the preparation and submission of proposals. Their purpose is to establish the requirements, content and required format for organizing proposals so that proposals are complete, contain all essential information and can be evaluated fairly. The following represents the extent of the instructions and conditions that are required to be met:

- a. **Letter of Interest:** The cover letter must list the development team members and identify the primary contact person. The letter must include a statement that the proposal will remain valid for not less than 90 days from the date of submission.
- b. **Profile of the Developer:** Provide an overview of the developer's experience in the planning, construction and management of projects similar to what is proposed. Include the following information for the last five years:
 - List all affordable and mixed-income rental and/or homeownership housing projects (preferably involving federally-subsidized housing units) successfully completed within the past five years, identifying location, sources of financing, number of units, bedroom sizes, and income groups served, and cost of each.
 - For two of the projects provide a more detailed description, as follows:
 - Provide detailed examples of completed, comparable housing development projects in which the developer had primary responsibility for implementing day-to-day development (including securing financing and providing completion and long-term operating guarantees) and performing ongoing asset management activities. If proposal is for a joint venture, provide at least one example for each member that is representative of its proposed role in the proposal. These examples should demonstrate that the Developer has effectively implemented mixed-income housing activities, including both affordable and market rate housing, comparable in scope and complexity to the proposals that have resulted in positive outcomes aligned with the housing goals of HUD's Choice Neighborhoods Initiative. These examples should also demonstrate that the developer has effectively developed, newly constructed, rehabilitated, and/or acquired, high-quality, energy efficient,

accessible housing that resulted in significant improvements in the quality, affordability, and income mix of housing in a neighborhood, and that it effectively managed the units either on its own or through a property management firm it directed. Finally, these examples should demonstrate that the developer effectively secured and leveraged significant funding streams from a range of public and private sources (i.e. identify all major sources and amounts of financing).

- Demonstrate experience with property management of mixed-income, mixed-finance, and mixed-use rental developments of similar size, either directly or through supervision of property management provided by a third party. Include information about income groups served.
- Provide a narrative description of the developer's previous experience in successfully utilizing MBE/Section 3 Business and achieving goals for utilization.
- Indicate whether the developer or any team member has ever been terminated from a contract or been sued by a Housing Authority, and if so, describe the circumstances and outcome. Also indicate whether the Developer, any affiliated entity or related property manager has ever been cited with any program violations by any state jousting finance agency or other funding entity.

c. **Profiles of Development Team Members:** Provide an organization chart of the development team.

- Provide information on each team members experience within their respective disciplines regarding developments of comparable size and complexity.
- Provide profiles/resumes of key staff, including the Project Manager, who will be involved in the redevelopment effort. Specify the roles of key staff in carrying out this development initiative and their previous experience with housing development and redevelopment.
- Provide contact information for three references for each business entity member of the development team.
- HUD rules prohibit non-competitive designation of a developer-controlled entity as a general contractor. JMHA is prepared to seek a waiver of this rule for this redevelopment effort, where appropriate. HUD has elsewhere approved the use of an identity-of-interest construction manager/general contractor, where the CM/GC guaranteed a not-to-exceed price and was paid a negotiated percentage of cost.
- JMHA does not prohibit or discourage the appearance of any person or entity on more than one development team. However, JMHA does reserve the right to request changes to the proposed membership of any development team.
- As the use of LIHTC proceeds is expected, a proposer may include a preferred syndicator on its team. However, at the time equity terms are established, the proposer will need to satisfy JMHA that such terms are favorable to the property in the current market, and may under certain circumstances require a competitive bid process (which preferred syndicator has the right to match).

9. INSURANCE AND BONDS

The selected Developer(s) will be required to maintain General Liability, Worker's Compensation, Automobile Liability, Professional Liability, and other forms of insurance, with firms authorized to do business in the State of Ohio, during the duration of performance of activities pursuant to this RFQ. The Developer(s) will also be required to indemnify JMHA against claims and obligations due to actions and activities of the Developer and not arising from negligence or misconduct of JMHA and its employees. Terms of all required insurance and indemnification will be included in the MDA.

10. EVALUATION PROCESS

Proposals will be evaluated based on responsiveness to the RFQ and in accordance with the evaluation criteria contained in Section 6 of this RFQ.

11. SUBMISSION AND CONTENT OF QUALIFICATIONS

Submittals must be made in strict accordance with the requirements of this RFQ. Following evaluation of qualifications and approval by JMHA, the respondents who are found to be responsive to the RFQ will be ranked.

- a. **Inquiries:** The intent of this RFQ is to establish the general specifications for the professional services needed and to provide prospective offerors with sufficient information to enable them to provide an acceptable response to this RFQ. Every effort has been made to outline requirement, and to provide information in a format that is clear and concise. Nevertheless, questions may arise, or additional information may be needed. Questions and inquiries regarding this RFQ must be submitted in writing and should refer to the specific paragraph in question. All inquiries must be received no later than **5 pm local time on February 23, 2024** and should be submitted in writing to:

Melody McClurg, Executive Director
mmcclurg@jeffersonmha.org

Answers will be provided as written addenda to this RFQ, and posted on JMHA's website and on www.steubenvillechoice.com. Answers will be issued as soon as possible.

It will be the responsibility of each offeror to make inquiry as to the existence and content of addenda, as the same shall become part of this RFQ and all offerors will be bound thereby, whether or not the addenda are actually received by the offeror.

- b. **Submission Date:** Qualifications shall be submitted electronically with a subject titled "STEUBENVILLE NORTH CHOICE NEIGHBORHOOD REAL ESTATE DEVELOPMENT SERVICES". All Qualifications must be received no later than **5:00 pm local time on March 1, 2024**. All proposals will be valid for ninety (90) days.

Submit Qualifications to the following address:

Melody McClurg, Executive Director
mmclurg@jeffersonmha.org

Please cc the following on your email:

cpetrossi@cityofsteubenville.us

eliza@emitconsultants.com

adam@collaboplanning.com

All qualifications will be considered as they are construed by JMHA reserving the right to reject any or all materials and the right to request oral presentations of all or some of the developer(s). JMHA requests that information be succinct. After reviewing the qualifications, additional information may be requested by JMHA.

12. AMENDMENTS TO THE RFQ

JMHA reserves the right to cancel or revise in part or in its entirety this RFQ, including, but not limited to, the selection schedule, the submittal date, and the submittal requirements. JMHA reserves the right to reject any and all proposals and to waive minor irregularities. JMHA further reserves the right to seek new proposals when doing so is reasonably in the best interest of JMHA.

All prospective respondents will be notified by written addenda if the Authority cancels or revises this RFQ.

13. SPECIAL CONDITIONS

By submitting a Qualification Submission Document to this RFQ, respondents acknowledge and agree to the following conditions:

- c. All Qualification Submission Documents submitted in response to this RFQ become the property of JMHA.
- d. Documents submitted are public records, subject to public review.
- e. JMHA will make no determination as to the adequacy of any system, process, procedure, or representation made by any respondent. As such, pre-qualification does not infer approval of any such systems, processes, procedures, or representations.
- f. No respondent will initiate contact with any member of the Board of Commissioners of JMHA regarding this RFQ until after completion of the selection process and execution of the MDA. If any respondent has any reason, not related to this RFQ, to contact any of the above parties,

they will be required to disclose to that party that they are a respondent in this solicitation. Failure to adhere to these requirements may result in disqualification from the solicitation.

- g. JMHA accepts no responsibility for any expenses incurred in the respondents' preparation of the requested Qualification Submission Documents; such expenses are to be borne exclusively by the respondents.
- h. JMHA reserves the right to waive any irregularities in any Qualification Submission Documents, to reject any or all Qualification Submission Documents, and to re-solicit for Qualification Submission Documents, as may be deemed to be in the best interest of JMHA.
- i. Respondents will not have employed or retained any company or person, other than a bona fide employee working solely for a respondent to solicit or secure the MDA. Respondents certify that they have not paid or agreed to pay any person, company, corporation, individual or firm other than a bona fide employee working solely for a respondent any fee, commission, percentage, gift or any other consideration, contingent upon or resulting from the award of or the making of a contract from this solicitation.
- j. Any person or affiliate, who has been disbarred from bidding on projects by any federal, state or local government agency, must fully disclose to the Authority the details of such disbarment.
- k. Any person or affiliate who has been placed on a convicted vendor list following a conviction for a public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity, may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work, may not submit proposals on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, or may not transact business with any public entity, for a period of thirty-six (36) months from the date of being placed on a convicted vendor list.
- l. JMHA reserves the right to request clarification of information submitted in the Qualification Submission Documents, to interview respondents, and to request additional information of one or more respondents. In addition, JMHA may conduct such investigations and interviews as it deems necessary to assist in the evaluation of any Qualification Submission Document submitted, and to establish to JMHA's satisfaction the responsibility, qualifications, and financial ability of any respondent.

14. PROCUREMENT PROCESS

A selection panel appointed by JMHA's Executive Director will review all qualifications. The selection panel shall be sole judge as to evaluation and ranking of proposals. Based on the evaluation and ranking, interviews may be conducted with selected proposers.

15. AWARD(S)

It is anticipated that the top-ranked respondent(s) will be interviewed (at JMHA's option) in March 2024. The final selection of pre-qualified respondents will not create a binding contract or obligation on the part of JMHA to enter into a MDA or any other agreement with any of the pre-qualified respondents.

16. ATTACHMENTS

[Attachment A – Draft Housing Concept Plans](#)

[Attachment B – Market Study](#)