



# **Corridors** *of* **Opportunity**

**REQUEST FOR PROPOSALS**

**Economy Inn Hotel Site**

**5350 and 5342 Reagan Drive**

**City of Charlotte**

**Housing & Neighborhood Services**

**600 East Trade Street**

**Charlotte, NC 28202-2859**

**Issuing Date: 06/29/2023**

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# 1 Purpose

The purpose of this RFP is to solicit proposals on 5350 and 5342 Reagan Drive for development of affordable for-sale residential units. The goal is to increase the supply of safe, decent, and affordable ownership opportunities for low and moderate-income households while complying with the city's affordable housing policies and funding source requirements. The RFP also aims to promote long-term affordability for residents and socially responsible ownership structures. Developers will be evaluated based on their ability to comply with program guidelines, financial feasibility, and their experience and capability as well as their community trust with surrounding neighborhoods.

## **Corridors of Opportunity Mission Statement**

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This RFP is part of the city's Corridors of Opportunity Program. Corridors of Opportunity are beautiful, safe, and prosperous communities where families can grow strong and build legacies for the future.

The site falls within the Sugar Creek/85 Corridor of Opportunity program boundary and is one of the top priorities of the Sugar Creek Playbook completed in 2022. For more information on the Corridors of Opportunity Program visit the website:  
<https://www.charlottenc.gov/Growth-and-Development/Corridors-of-Opportunity>.

# 2 Schedule

The City of Charlotte deadline for receiving proposals in response to this RFP is August 15, 2023. The City of Charlotte withholds the ability to consider additional proposals until the project is rewarded.

### 3 General Requirements and Goals

The City of Charlotte (“The city”) is committed to creating diverse and inclusive neighborhoods. One method of creating these types of neighborhoods is helping to ensure that safe, decent, and affordable ownership opportunities are available for low and moderate-income households.

The city’s Housing Policy embraces the following national goals established by the United States Department of Housing and Urban Development, and aligns with the City Council priorities as set forth in the Housing Charlotte Framework which supports the creation and preservation of safe and decent housing for low- and moderate-income households:

- Provide decent and affordable housing,
- Provide a suitable living environment, and
- Expand economic opportunities to benefit low and moderate-income households.

In addition to the city’s Housing Policy, the Corridors of Opportunity [Sugar Creek Playbook](#) and [Sugar Creek/I-85 Design Sprint](#) serves as a framework for the project. Both documents outline the clear objective: Reduce the number of hotels through redevelopment and build partnerships through collaboration and open communication to achieve goals, while strengthening the sense of community identity.

#### 3.1 Goals

The City of Charlotte purchased the former Economy Inn property in April 2023 with the purpose of redeveloping the site with for-sale affordable housing.

The city’s commitment is to utilize resources as necessary, with as much financial stewardship as possible to achieve the goal of housing on the site. If necessary, the city will consider providing Housing Trust Funds (HTF) as a last-resort gap financing to create affordable for-sale units. The city’s development funding strategy is designed to leverage both public and private financing to specifically target households earning 80% and below the Area Median Income (AMI), ensuring that those in need are prioritized.

In evaluating proposals for the Reagan Drive site, the city takes into consideration several key factors.

- Public purpose (but for the city investment, the project would not be feasible for the targeted income group)
- Community benefits (e.g., community spaces, green/open space, programming for adjacent communities)
- Ability of the proposed development to help achieve the City’s affordable housing policies and goals
- Financial feasibility
- Developer’s capability and experience
- Number of affordable housing units and targeting of incomes
- Long-term affordability

- Community engagement plan
- Completeness of proposal (incomplete or confusing proposals will not be considered)

To ensure City-financed affordable housing developments adhere to the City's affordable housing goals, each affordable housing development must:

- Maintain the affordability of units using long-term deed restrictions. The minimum length of the affordability period will be 20 years, but longer terms are preferred
- Comply with the City's zoning, land development and other housing policies and regulations

### **3.1.1 Community Engagement Process**

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Applicant must inform the district City Council and work with the Corridors of Opportunity Team to ensure that community engagement and buy-in occurs during the development phase. A **Community Engagement Strategy** should be included as part of the proposal.

## **3.2 General Requirements**

It is imperative to carefully review and adhere to all requested items contained in the Request for Proposals ("RFP") packet. Development Teams are required to submit proposals in strict accordance with the requirements outlined in the RFP documents. The entire set of documents enclosed in the RFP packet constitutes the RFP, and the Developer must ensure that all necessary information is submitted for proper analysis. The city will only consider complete proposal packets for review, and incomplete packets will not be accepted.

Each Developer shall fully comply with all federal, state, and local ordinances and statutes governing residential housing development.

Request for Proposals Review and Submission: Request for Proposals will be accepted only in accordance with the instructions provided in this request and documents in the submittal checklist. Developers are solely responsible for the timely and accurate submission of their Proposals.

### **3.2.1 Accuracy of RFP and Related Documents**

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Each Respondent must independently evaluate all information provided by the city. The city makes no representations or warranties regarding any information presented in this RFP, or otherwise made available during this procurement process, and assumes no responsibility for conclusions or interpretations derived from such information. In addition, the City will not be bound by or be responsible for any explanation or conclusions regarding this RFP or any related documents other than those provided by an addendum issued by the City. Companies may not rely on any oral statement by the city or its agents, advisors, or consultants.

If a Respondent identifies potential errors or omissions in this RFP or any other related documents, the Respondent should immediately notify the city of such potential discrepancy in writing. The City may issue a written addendum if the City determines clarification necessary. Each Respondent requesting an interpretation will be responsible for delivering such requests to the City's designated representative as directed in RFP Section 3.2.5.

### **3.2.2 City's Rights and Options**

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The City reserves the right, at the City's sole discretion, to take any action affecting this RFP, this RFP process, or the Services or facilities subject to this RFP that would be in the best interests of the City, including:

- To supplement, amend, substitute, or otherwise modify this RFP, including the schedule, or to cancel this RFP, at any time
- To require any Companies to supplement or clarify its Proposal or provide additional information relating to its Proposals
- To investigate the qualifications, experience, capabilities, and financial standing of each Respondent submitting a Proposal
- To waive any defect or irregularity in any Proposal received
- To reject any or all Proposals
- To share the Proposals with City employees and contractors in addition to the Evaluation Committee as deemed necessary by the city
- To award all, none, or any part of the Services and enter into Contracts with one or more of the responding Companies deemed by the City to be in the best interest of the City, which may be done with or without re-solicitation
- To discuss and negotiate with any Respondent their proposal terms and conditions, including but not limited to financial terms
- To terminate discussions and negotiations with any Respondent at any time and for any reason.

### **3.2.3 Expense of Submittal Preparation**

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The City accepts no liability, and Companies will have no actionable claims, for reimbursement of any costs or expenses incurred in participating in this solicitation process. This includes expenses and costs related to Proposal submission, submission of written questions, attendance at pre-proposal meetings or evaluation interviews, contract negotiations, or activities required for contract execution.

### **3.2.4 Proposal Conditions**

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The following terms are applicable to this RFP and the Respondent's Proposal.

#### **3.2.4.1 RFP Not an Offer**

This RFP does not constitute an offer by the city. No binding contract, obligation to negotiate, or any other obligation shall be created on the part of the City unless the City and the Respondent execute a Contract. No recommendations or conclusions from this RFP process concerning the Respondent shall constitute a right (property or otherwise) under

the Constitution of the United States or under the Constitution, case law, or statutory law of North Carolina.

### **3.2.4.2 Trade Secrets and Personal Identification Information.**

#### Definition

Upon receipt by Housing & Neighborhood Services, all materials submitted by a Respondent (including the Proposal) are considered public records except for (1) material that qualifies as “trade secret” information under N.C. Gen. Stat. § 66-152 et seq. (“Trade Secrets”) or (2) “personally identifiable information” protected by state or federal law, to include, but not be limited to, Social Security numbers, bank account numbers, and driver’s license numbers (“Personally Identifiable Information” or “PII”).

#### Instructions for Marking and Identifying Trade Secrets

If any Proposal contains Trade Secrets or PII, such Trade Secrets and PII must specifically and clearly be identified in accordance with this section by clearly separating them from the rest of the Proposal. For hard copy documents, it must be submitted in a separate, sealed envelope, marked either “Personally Identifiable Information – Confidential” or “Trade Secret—Confidential and Proprietary Information.” For electronic submissions it must also be submitted on a separate flash drive. In both hard copy or electronic format, the confidentiality caption stated above must appear on each page of the Trade Secret or PII materials.

#### Availability of Proposals to City Staff and Contractors

By submitting a Proposal, each Respondent agrees that the City may reveal any Trade Secret materials and PII contained therein to all City staff and City officials involved in the selection process, and to any outside consultant or other third parties who serve on the Evaluation Committee or who are hired or appointed by the City to assist in the evaluation process.

#### Availability of Proposals via Public Records Requests

Any person or entity (including competitors) may request Proposals submitted in response to an RFP. Only those portions of RFPs properly designated as Trade Secret or PII are not subject to disclosure. The public disclosure of the contents of a Proposal or other materials submitted by a Respondent is governed by N.C. Gen. Stat. §§ 132 and 66-152, et seq.

When determining whether to mark materials as Trade Secret, please note the following:

- Entire Proposals may not be marked as Trade Secret
- Pricing may not be marked as Trade Secret

The City may disqualify and Respondent that designates its entire Proposal as a trade secret, or any portion thereof that clearly does not qualify under applicable law as a Trade Secret or PII. Each Respondent agrees to indemnify, defend, and hold harmless the City and each of its officers, employees, and agents from all costs, damages, and expenses incurred in connection with refusing to disclose any material that the Respondent has designated as a Trade Secret or PII. This includes an obligation on the part of the Respondent to defend

any litigation brought by a party that has requested Proposals or other information that the Respondent has marked Trade Secret or PII.

#### **3.2.4.3 Amendments to RFP**

If the City amends this RFP, addenda will be posted to the IPS website at [www.ips.state.nc.us](http://www.ips.state.nc.us) and the City's HNS\_RFP Site. Companies are required to acknowledge receipt of each addendum by including the Addenda Receipt Confirmation Form (Form 1) with their Proposals.

#### **3.2.4.4 Proposal Terms Firm and Irreversible**

The signed Proposal shall be considered a firm offer on the part of the Respondent. The City reserves the right to negotiate price and other terms. All Proposal elements (including all statements, claims, declarations, prices, and specifications) shall be considered firm and irrevocable for purposes of future Contract negotiations unless specifically waived in writing by the City. The Respondent chosen for award should be prepared to have its Proposal and any relevant correspondence incorporated into the Contract, either in part or in its entirety, at the City's election.

#### **3.2.4.5 Proposal Binding for 120 Days**

Section 6, Form 3 contains a statement to the effect that the Proposal is a firm offer for one-hundred-twenty (120) calendar day period from the date of the opening. This statement must be signed by an individual authorized to bind the Respondent. All prices quoted shall be firm and fixed for the full Contract period. The City shall have the option to accept subject to exception by Contract.

#### **3.2.4.6 Charlotte Business INclusion Program**

Pursuant to Charlotte City Council's adoption of the Charlotte Business INclusion (CBI) Policy, the CBI program promotes diversity, inclusion, and local business opportunities in the City's contracting and procurement process for Minority-owned, Woman-owned, and Small Business Enterprises (MWSBEs) with a significant business presence in the Charlotte Combined Statistical Area. The CBI Policy is posted at [www.charlottebusinessinclusion.com](http://www.charlottebusinessinclusion.com).

The City is committed to promoting opportunities for maximum participation of certified MWSBEs on City-funded contracts at both the prime and subcontract level. For MWSBE participation to count towards a Subcontracting Goal, MWSBEs must meet both the certification and geographic requirements as detailed throughout this solicitation and in the CBI Policy.

The city intends to negotiate utilization of MWSBE(s). The Respondent is required to submit Form 2 attached herein. Failure to submit this form with the Proposal shall render the Proposal non-responsive.

#### **3.2.4.7 Equal Opportunity**

The City has an equal opportunity purchasing policy. The city seeks to ensure that all segments of the business community have access to supplying the goods and services



needed by City programs. The city provides equal opportunity for all businesses and does not discriminate against any Companies regardless of race, color, religion, age, sex, and national origin or disability.

#### **3.2.4.8 Advertising**

No advertising, sales promotion, or other materials of the Respondent or its agents or representatives may identify or reference the City in any manner absent the prior written consent of the City.

#### **3.2.4.9 Withdrawal for Modification of Proposals**

Companies may change or withdraw a previously submitted Proposal at any time prior to the Proposal due date. Only formal written requests addressed in the same manner as the Proposal and received by the City prior to the Proposal due date will be accepted. The request must be in a sealed envelope that is plainly marked “**Modifications to Proposal.**” No oral modifications will be allowed. If the Respondent complies with this Section, after the Proposal due date, the Proposal, will be withdrawn or corrected in accordance with the written request(s).

#### **3.2.4.10 No Bribery**

In submitting a response to this RFP, each Respondent certifies that neither it, any of its affiliates or subcontractors, nor any employees of any of the foregoing has bribed, or attempted to bribe, an officer or employee of the City in connection with the Contract.

#### **Exceptions to the RFP**

Other than exceptions that are stated in compliance with this Section and Section 4.2.4.5, each Proposal shall be deemed to agree to comply with all terms, conditions, specifications, and requirements of this RFP. All exceptions taken must be identified and explained in writing in your Proposal and must specifically reference the relevant section(s) of this RFP. If the Respondent provides an alternate solution when taking an exception to a requirement, the benefits of this alternative solution and impact, if any, on any part of the remainder of the Respondent’s solution, must be described in detail.

#### **3.2.5 Developer Questions and Inquiries**

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The city is committed to providing all developers responding to the RFP with accurate and consistent information to ensure that no Developer obtains an undue competitive advantage. All questions and inquiries must be directed as indicated below:

Warren Wooten  
Housing & Neighborhood Services  
600 East Trade Street  
Charlotte, NC 28202  
Phone: 704-336-2489  
[warren.wooten@charlottenc.gov](mailto:warren.wooten@charlottenc.gov)

## 4 Criteria & Preferences

Successful proposals shall meet the following minimum criteria:

### 4.1 General

- Comply with city affordable housing policies, funding source requirements and program guidelines including the city's Source of Income Protections policy.
- Provide a minimum affordability period of twenty (20) years. With a preference given to proposals that include long term or permanent affordability options.

### 4.2 Preferences

The following are preferences for City of Charlotte:

- Local community-based partnerships are encouraged.
- Community benefits are clearly outlined in proposal.
- Developer provides a strategy for long-term affordability.

#### 4.2.1 General Preferences

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When evaluating proposals, the following are preferences:

- A commitment to extended affordability periods
- Clearly outlined community benefits
- A commitment to owner occupied for-sale housing
- A thorough community engagement plan that incorporates local community-based partnerships
- Use of available homeownership development resources such as House Charlotte or NCHFA Community Partners Loan Pool

## 5 Submittal Instructions

Each application submittal process will consist of the developer submittal of:

- Developer Application – This is a city-provided Word document. The developer will complete the word document following the instructions found in the word document, convert to PDF, and submit as **Application – Developer Name – ReaganDrive.pdf**
- Application Data Sheet – This is a city-provided Excel workbook. Complete the workbook and attach it to the submittal as **Datasheet – Developer Name – ReaganDrive.xlsx**

In addition to these two documents, the following section details additional submittal requirements. Please see the submittal checklist as to what documents are required, optional or conditional.

- For all other documents requested, please include them in PDF format unless otherwise stated, and attach them to your submittal as **Document Name – Developer Name – ReaganDrive.pdf**

## 6 Submittal Checklist

Submittal Checklist	Type	Included (yes/no)
Submittal Checklist	Required	
Proposal Information Sheet (provided Excel sheet)	Optional	
Developer Text Submittal (provided Word document)	Required	
References - <b>Attachment 1 – Developer References.pdf</b>	Conditional	
<b>Financial Statements</b>		
<ul style="list-style-type: none"> <li>Current year financial statement and previous two years financial statements - <b>Attachment 2 – Financial Statements.pdf</b></li> </ul>	Required	
<ul style="list-style-type: none"> <li>Most recent independent audit and auditor’s management letter - <b>Attachment 3 – audit.pdf</b></li> </ul>	Required	
<ul style="list-style-type: none"> <li>Form 990 (current &amp; prior year if applicable – nonprofit applicants only) <b>Attachment 4 – 990.pdf</b></li> </ul>	Conditional	
<ul style="list-style-type: none"> <li>Verification that all state and federal taxes are current (including IRS withholdings) <b>Attachment 5 – tax certification.pdf</b></li> </ul>	Required	
<b>Applicant’s organization / background information</b>		
<ul style="list-style-type: none"> <li>Articles of Incorporation and current bylaws <b>Attachment 6 – articles.pdf</b></li> </ul>	Required	
<ul style="list-style-type: none"> <li>IRS 501c (3) determination letter (if non-profit) <b>Attachment 7 – 501c3.pdf</b></li> </ul>	Conditional	
<ul style="list-style-type: none"> <li>List of Board of Directors including address and telephone numbers; list of officers and their positions for non-profits <b>Attachment 8 – Board of Directors.pdf</b></li> </ul>	Conditional	
<ul style="list-style-type: none"> <li>Current organizational chart <b>Attachment 9 – org chart.pdf</b></li> </ul>	Required	
<ul style="list-style-type: none"> <li>Certificate of Good Standing from the North Carolina Secretary of State or State where the</li> </ul>	Required	

<b>Submittal Checklist</b>	Type	Included (yes/no)
developer/development team is incorporated <b>Attachment 10 – cert of good standing.pdf</b>		
<ul style="list-style-type: none"> <li>• Verification of any committed and/or anticipated funding for the project (e.g., approval letters, letters of intent, feasibility letters.) <b>Attachment 11 – funding commitments.pdf</b></li> </ul>	Required	
<b>Site Specific</b>		
Proforma <b>Attachment 12 – single family sources and uses.xls</b>	Required	
Site Plan: <b>Attachment 13 – siteplan.pdf</b> - A site plan with number of units, street layout, streetscape improvements and	Required	
<ul style="list-style-type: none"> <li>• Detail any developer fees and equity share</li> </ul>		
Community Engagement Plan: <b>Attachment 14 – CE.doc</b>	Required	
Other documents as appropriate	Optional	
CHARLOTTE BUSINESS INCLUSION/ MWSBE <b>Attachment 14 - MWSBE.pdf</b>	Required	
ADDENDA RECEIPT CONFIRMATION FORM <b>Attachment 15 – Addenda Receipt.pdf</b>	Conditional	

# Form 1 - Addenda Receipt Confirmation Form

## NATURALLY OCCURRING AFFORDABLE HOUSING ACQUISITION, REHABILITATION & SUBSIDY

Please acknowledge receipt of all addenda by including this form with your Proposal. All addenda will be posted to the NC IPS website at [www.ips.state.nc.us](http://www.ips.state.nc.us) and the City's Contract Opportunities Site at <http://charlottenc.gov/DoingBusiness/Pages/ContractOpportunities.aspx>

**ADDENDUM #:**

**DATE ADDENDUM**

**DOWNLOADED FROM NC IPS:**

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\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I certify that this proposal complies with the Specifications and conditions issued by the City except as clearly marked in the attached copy.

\_\_\_\_\_  
(Please Print Name)

Date \_\_\_\_\_

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

\_\_\_\_\_  
Title

\_\_\_\_\_  
Company Name

## Form 2 – Charlotte Business Inclusion/ MWSBE

### NATURALLY OCCURRING AFFORDABLE HOUSING ACQUISITION, REHABILITATION & SUBSIDY

The city maintains a strong commitment to the inclusion of MWSBEs in the City's contracting and procurement process when there are viable subcontracting opportunities.

Companies must submit this form with their proposal outlining any supplies and/or services to be provided by each City-certified Small Business Enterprise (SBE), and/or City-registered Minority-owned Business Enterprise (MBE) and Woman-owned Business Enterprise (WBE) for the Contract. If the Company is a city-registered MWSBE, note that on this form.

The city recommends you exhaust all efforts when identifying potential MWSBEs to participate on this RFP.

Company	
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Please indicate if your company is any of the following:

MBE     WBE     SBE     None of the above

If your company has been certified with any of the agencies affiliated with the designations above, indicate which agency, the effective and expiration date of that certification below:

Agency Certifying: \_\_\_\_\_ Effective Date: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Identify outreach efforts that were employed by the firm to maximize inclusion of MWSBEs to be submitted with the firm's proposal (attach additional sheets if needed):

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Identify outreach efforts that will be employed by the firm to maximize inclusion during the contract period of the Project (attach additional sheets if needed):

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*[Form continues on next page]*

List below all **MWSBEs** that you intend to subcontract to while performing the Services:

Subcontractor Name	Description of work or materials	Indicate "M," "S," and/or "W"	City Vendor #

Total MBE Utilization	%
Total WBE Utilization	%
Total SBE Utilization	%
<b>Total MWSBE Utilization</b>	%

**Representative (signed):** \_\_\_\_\_

\_\_\_\_\_

Date

\_\_\_\_\_

Representative Name

\_\_\_\_\_

Estimated Total Contract Value