



REQUEST FOR PROPOSALS

NATURALLY OCCURRING AFFORDABLE HOUSING ACQUISITION, REHABILITATION & SUBSIDY

**City of Charlotte
Housing & Neighborhood Services
600 East Trade Street
Charlotte, NC 28202-2859**

May 2023

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1 GENERAL CONDITIONS

2 PURPOSE

The purpose of this RFP is to provide gap funding for acquisition and rehabilitation opportunities resulting in the preservation of naturally occurring affordable housing in the City of Charlotte. The goal is to increase the supply of safe, decent, and affordable rental homes for low and moderate-income households while complying with the city's affordable housing policies, funding source requirements, and program guidelines. 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. The RFP also includes preferences for investments that align with the city's priorities and that are located in areas of special interest.

3 SCHEDULE

The City of Charlotte will begin receiving proposals in response to this RFP on May 8, 2023 and will continue considering proposals until funding is exhausted or the city closes the RFP through public notification.

4 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 housing is available for low and moderate-income households.

Preserving multifamily rental affordability is crucial in ensuring neighborhood preservation and economic mobility. As many families may not have the means to purchase a home, affordable rental options provide them with stability and security. However, due to rapid population growth and increasing home prices in the Charlotte area, the availability of affordable rental homes for low and moderate-income families has declined. Expanding the supply of high-quality, safe, and affordable rental homes is recognized as one of the three pillars in the Housing Charlotte Framework. The Housing Trust Fund (HTF) provides gap financing to incentivize and support developers in producing affordable rental housing for low and moderate-income households, helping to address the urgent need for affordable rental options in the community.

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.

4.1 GOALS

The city's commitment is to utilize the Housing Trust Fund (HTF) and other federal sources as a last-resort gap financing to preserve the affordability of market rate housing units. This critical intervention aims to prevent current occupants from facing financial hardships or displacement due to escalating costs. The city's development funding strategy is designed to leverage both public and private financing to specifically target households earning 60% and below the Area Median Income (AMI), ensuring that those in need are prioritized.

In evaluating proposals for affordable housing development loans and grants, 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);
- Ability of the proposed development to help achieve the City's affordable housing policies and goals
- Financial feasibility
- Developer's capability and experience
- Site location
- Acquisition and rehabilitation of the proposed development must be completed within 9 months from the date of the award, and renovation must be completed within 2 years of the HTF award closing
- Number of affordable housing units and targeting of incomes
- Long-term affordability
- 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
- Consist of a minimum of 10 units on a single parcel
- Comply with the City's zoning, land development and other housing policies and regulations

4.1.1 Community Outreach Process

Applicant must inform the district City Council representative for the proposed development purchase and proposals must include an Outreach and Marketing Plan. Applicants shall provide evidence of council notification and include the plan in their proposal submittal.

4.2 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.

4.2.1 Accuracy of RFP and Related Documents.

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 4.2.5.

4.2.2 City's Rights and Options

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.

4.2.3 Expense of Submittal Preparation.

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.

4.2.4 Proposal Conditions.

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

4.2.4.1 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.

4.2.4.2 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.

4.2.4.3 Amendments to RFP.

If the City amends this RFP, addenda will be posted to the IPS website at www.ips.state.nc.us 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.

4.2.4.4 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.

4.2.4.5 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.

4.2.4.6 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.

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.

4.2.4.7 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.

4.2.4.8 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.

4.2.4.9 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).

4.2.4.10 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.

4.2.4.11 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.

4.2.5 Developer Questions and Inquiries

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

5 INVESTMENT ELIGIBILITY CRITERIA & PREFERENCES

City NOAH investments shall meet the following minimum criteria:

5.1 GENERAL

- Comply with city affordable housing policies, funding source requirements and program guidelines including the city's Source of Income Protections policy.
- Include at least 20% of the total units as being targeted to households at 30% of AMI. At least 10% of the units targeted to households at 30% of AMI, must be targeted to households with rental subsidies including vouchers funded directly or indirectly by the federal government. Such rental subsidies must be accepted with no discrimination against income source.
- Provide a minimum affordability period of twenty (20) years.
- Proposed acquisitions in Very High and High Opportunity Areas may be asked to include the use of Project Based Vouchers (PBV) in the development. Given the limited availability of PBV's, there is no guarantee that all proposals located in opportunity areas will be awarded PBVs to them. If the use of PBV's does not adversely impact the proposed development's time schedule, upon being awarded PBV's, the developer must adjust their gap funding request amount to reflect the higher PBV contract rents.
- Developers shall pay a compliance monitoring fee (for developments funded under this RFP, the lesser or \$50 per unit per year or \$7,000 per year) escalating 3% annually
- Rental increases shall be no more than 3% per year. Rent increased above this level must be requested and approved by the city in writing.

5.2 PREFERENCES

The following are preferences for City of Charlotte NOAH investments:

5.2.1 General

When evaluating potential investments, priority will be given to developments that align with one or more of the following preferences:

- Developments with a subsidy request of \$35,000 per unit or less.
- Developments willing to accept some or all of their award in federal funds.
- Developments that demonstrate strong leverage ratios, maximizing their financial efficiency.
- Developments that commit to extended affordability periods, ensuring long-term affordability for residents.
- Projects with nonprofit ownership or offering a right of first refusal to a nonprofit or local government beneficiary promote community-oriented and socially responsible ownership structures.

5.2.2 Geographic

The city has several current geographies of special interest. Acquisitions in these areas are of the highest priority :

- Development in the corridors of opportunity and areas specifically referenced in current city playbooks
- Development that are in or adjacent to Staying In Place neighborhoods

- Developments located in District 6 or District 7

6 UNDERWRITING CRITERIA

Proposal shall be reviewed in the order in which they are received based on the submittal date and time as listed in the online submittal portal. Proposals will be reviewed to meet the following minimum requirements and assessed based on City Council priorities and industry best practices.

The city’s underwriting process assesses the financial feasibility and risks associated with financing and investing in the proposed NOAH development. This process requires a thorough understanding of the unique characteristics and challenges of the specific development and local market,

6.1 PRIMARY ASSUMPTIONS

Submitted proformas shall be reviewed for adherence to the following basic assumptions

Vacancy Rate	7%
Annual Rent Increase	2%
Annual operating expense and replacement reserve annual increase	3%
Operating Expenses	\$3,800 to \$4,200 per unit per year, not including taxes, reserves, and residential support services.
Developers Fee	May be loaned to a project to cover a gap. Repayment projections for loans must not negatively impact the operations of the development. If applicable, a resolution from the Board of Directors allowing such a loan to the project must be provided.
Contingency	Hard cost contingency line item of at least 10% of the total hard costs.

6.2 PROPERTY MANAGEMENT

Effective property management is crucial for the success of a multi-family project. A qualified property manager should have a proven track record that includes a history of low collection losses, minimal vacancy rates compared to similar projects, adherence to budgetary constraints, implementation of a comprehensive maintenance program, and establishment of clear operating policies and procedures. Furthermore, the property manager should be knowledgeable about the various funding sources for affordable housing development and rental subsidies.

In addition to these qualifications, the city has established specific property management guidelines. While developments with fewer than 25 units are not required to have onsite management, they must provide residents with access to a professional property management service via phone for at least 40 hours per week, as well as a 24-hour on-call service. For multi-family housing developments with 25 or more units, an on-site office must be maintained, and management personnel must be provided as outlined below:

<u>Size of Development</u>	<u>Minimum Onsite Requirements</u>
25 - 50 units	20 hours per week
51 - 75 units	30 - 40 hours per week
76 - 100 units	40 hours per week with on-site Resident employee or 80 hours per week

6.3 MARKET AND OTHER EXTERNAL FACTORS

As part of the acquisition process for an existing multifamily development, the developer shall provide comprehensive market data required by the City of Charlotte, considering the City as the investor. The market analysis should provide detailed information on the location and neighborhood, socio-economic and demographic trends, and competitive landscape.

Specifically, the market data should include the following areas:

- Location and Neighborhood Information: This should include a detailed project description, neighborhood characteristics, proximity to amenities such as shopping centers and schools, and other relevant factors that may impact the marketability of the development.
- Socio-Economic and Demographic Development: This should provide an overview of the economic context of the area, growth trends, and demographic and income characteristics of the target market, including factors such as population growth, employment trends, and income levels that may influence demand for affordable housing.
- Competitive Analysis: This should assess the existing housing stock in the area, including rental and for-sale markets, as well as any proposed developments.
-

Market data should also include a detailed analysis of affordability, including an assessment of the local market demand for affordable housing and a current rent role of the development. Reliable data and analysis should be provided to support the acquisition decision.

6.4 OPERATING AND FINANCIAL RISK

The City seeks projects with a desirable debt service coverage ratio of *at least 1:15 for the term of any debt financing*. In addition, the city seeks projects with a desirable break-even occupancy that is lower than 85%.

Debt Service Coverage	Break-Even Occupancy	Risk
Greater than 1.30	Less than 70%	Low

1.10 to 1.30	70% to 85%	Medium
Less than 1.10	Greater than 85%	High

The City may consider project submissions outside of the operating and financial risk guidelines as stated above. Consideration however will be given based on the number of affordable and workforce units, income limit served, projects ability to meet the City's goals and the overall viability of the project.

6.4.1 Reserves

6.4.1.1 Operating Reserve

Operating Reserves shall be based on six months debt service and operating expenses and must be maintained for one full calendar year starting at the point that the 1:15 debt service coverage ratio is achieved (or as low as 1:10 for projects in which at least 20% of the units serve households earning 40% and below AMI). The City must approve any withdrawals from the operating reserves account to meet the project's operating deficits that exceed \$5,000 in aggregate during any three-month period. Withdrawals from the operating reserve account must be replaced to maintain the initial required funds as reflected in the City's loan agreement.

6.4.1.2 Replacement Reserve

Replacement reserves funded from the development budget or deducted monthly from cash flow are indicators of the sustainability of the project. The city requires a minimum \$350 per unit per year replacement reserve for NOAH projects with a 4 percent increase per year. Alternatively, the applicant may provide a detailed physical conditions assessment report completed by a licensed engineer and base year 1-15 replacement reserves on replacement costs and timing provided in the report and adding a 10% contingency.

7 REPORTING AND MONITORING

7.1 REPORTING

The developer is required by the loan agreement to submit, at the city's discretion, quarterly and/or annual reports in a format determined by the city. The developer must provide the following during the term of the loan:

- Copies of all certificates of occupancy (if applicable)
- Payment if stipulated in the loan agreement
- Insurance certificate in which the City is the named as an insured
- Any material changes in governance or management
- Any other debt or borrowing, for this project or any project
- Any change or loss in property and casualty insurance
- Any pending legal action and their assessment of the impact of such action

7.2 MONITORING

Yearly asset management will involve site visits and/or document review to ensure compliance with the city's requirements and to assess the financial and operational performance of the development. This

will include reviewing the property manager's performance, conducting regular inspections to assess physical conditions and maintenance needs, tracking occupancy rates and rent rolls, and analyzing financial statements to evaluate the project's financial health. Asset management will review the operating and replacement reserves and review document to verify the development remains in compliance with any regulatory requirements and agreements. The asset manager will work closely with the property manager address any issues that arise to ensure the long-term viability and success of the development.

8 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 – Project Name – Developer Name – NOAH23.pdf**
- Application Data Sheet – This is a city provided excel workbook. Complete the workbook and attach it to the submittal as **Datasheet – Project Name – Developer Name – NOAH23.xlsx**

In addition to these two documents, the following section detail 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 – project name – developer name – NOAH23.pdf”. For example, Attachment 9 – org chart – Apple Apartments – Apple Developer – NOAH23.pdf.

9 SUBMITTAL CHECKLIST

Submittal Checklist	Type	Included (yes/no)
Submittal Checklist	Required	
Affordable Housing Funding Application (provided excel sheet)	Required	
Developer Text Submittal (provided word document)	Required	
References - Attachment 1 – Developer References.pdf	Conditional	
Financial Statements		
<ul style="list-style-type: none"> Current year financial statement and previous two years financial statements - Attachment 2 – Financial Statements.pdf 	Required	
<ul style="list-style-type: none"> Most recent independent audit and auditor’s management letter - Attachment 3 – audit.pdf 	Required	
<ul style="list-style-type: none"> Form 990 (current & prior year if applicable – nonprofit applicants only) Attachment 4 – 990.pdf 	Conditional	
<ul style="list-style-type: none"> Verification that all state and federal taxes are current (including IRS withholdings) Attachment 5 – tax certification.pdf 	Required	
Applicant’s organization / background information		
<ul style="list-style-type: none"> Articles of Incorporation and current bylaws Attachment 6 – articles.pdf 	Required	
<ul style="list-style-type: none"> IRS 501c (3) determination letter (if non-profit) Attachment 7 – 501c3.pdf 	Conditional	
<ul style="list-style-type: none"> List of Board of Directors including address and telephone numbers; list of officers and their positions for non-profits Attachment 8 – Board of Directors.pdf 	Conditional	
<ul style="list-style-type: none"> Current organizational chart Attachment 9 – org chart.pdf 	Required	
<ul style="list-style-type: none"> Certificate of Good Standing from the North Carolina Secretary of State or State where the developer/development team is incorporated Attachment 10 – cert of good standing.pdf 	Required	
<ul style="list-style-type: none"> Verification of any committed and/or anticipated funding for the project (e.g. approval letters, letters of intent, feasibility letters.) Attachment 11 – funding commitments.pdf 	Required	
Site Specific		
Commercial Appraisal Attachment 12 - appraisal.pdf	Required	
Screenshot of locational site score (can be found at community.charlottenc.gov) Attachment 13 – site score.pdf	Required	
Proforma Attachment 14 – proforma.xls	Required	
Tax Card or other evidence that buildings have been placed in service on or before December 31, 2007 Attachment 15 – tax card.pdf	Required	

Submittal Checklist	Type	Included (yes/no)
Relocation plan and statement of proposed relocation assistance (if applicable) Attachment 16 – relocation plan.pdf	Conditional	
Project budget (including relocation if applicable) Attachment 17 – budget.pdf	Required	
<ul style="list-style-type: none"> • Proposed terms of the funding request with specified lien position and collateral 		
<ul style="list-style-type: none"> • Estimated cost per eligible unit and costs per square foot (include documentation in the form of construction contract or source of the cost estimates) 		
<ul style="list-style-type: none"> • Detail any developer fees and equity share 		
<ul style="list-style-type: none"> • City of Charlotte Asset Management fee of \$2,500 per year escalating at 3% annually 		
<ul style="list-style-type: none"> • Evidence that acquisition cost is not more than sixty (70%) of the total replacement costs 		
Other documents as appropriate	Optional	
CHARLOTTE BUSINESS INCLUSION/ MWSBE Attachment 18 - MWSBE.pdf	Required	
ADDENDA RECEIPT CONFIRMATION FORM Attachment 19 – Addenda Receipt.pdf	Conditional	

10 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 and the City's Contract Opportunities Site at <http://charlottenc.gov/DoingBusiness/Pages/ContractOpportunities.aspx>.

ADDENDUM #: DATE ADDENDUM

DOWNLOADED FROM NC IPS:

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

11 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 Name:	
---------------	--

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):

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):

[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	%
Total MWSBE Utilization	%

Representative (signed): _____

Date

Representative Name

Estimated Total Contract Value