
“Enhancing Neighborhoods, Strengthening Communities, Changing Lives”

SOLICITATION TYPE: Request for Qualifications (RFQ)

RFQ NUMBER: RFQ #15-001

DESCRIPTION: Developer Service

ISSUE DATE: September 24, 2015

PROPOSAL DUE DATE & TIME: October 26, 2015

PRE-PROPOSAL LOCATION & PROPOSAL DELIVERY LOCATION: Greater Dayton Premier Management (GDPM)
400 Wayne Avenue
Dayton Ohio 45410

DIRECT INQUIRIES TO: Xavier Gullatte
Compliance Department
(937) 910-7613/Fax (937)910-7628
Compliance@gdpm.org

The responsibility for submitting a response to this RFQ on or before the stated date and time will be the sole responsibility of the respondent.

Respectfully,

Xavier Gullatte

Xavier Gullatte
Compliance Department



DAYTON METROPOLITAN HOUSING AUTHORITY
dba
GREATER DAYTON PREMIER MANAGEMENT
400 WAYNE AVENUE
DAYTON OH 45401-8750

"Enhancing Neighborhoods, Strengthening Communities, Changing Lives"

RFQ REQUEST FOR QUALIFICATIONS

#15-001

DEVELOPER SERVICES

Prepared by: Greater Dayton Premier Management
400 Wayne Avenue
Dayton, Ohio 45410

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REQUIREMENTS & SPECIFICATIONS

Overview:

The Dayton Metropolitan Housing Authority dba Greater Dayton Premier Management (GDPM) is seeking Statements of Qualifications for a Development Services Partner (Partner) to assist in the completion of various affordable housing projects. The selection process under this RFQ will result in the selection of up to two Partners. GDPM will consider for profit, or not for profit developers, interested in partnering with GDPM to develop creative solutions to address affordable housing needs within Montgomery County, Ohio. GDPM will retain the option to manage developments upon completion. GDPM has capital funds available and is looking for a development partner to assist in leveraging current resources.

The successful Respondents will demonstrate through their respective responses, that each possess the necessary qualifications to implement a comprehensive redevelopment or rehabilitation plan that may incorporate various types of affordable housing, including but not limited to, mixed-income, mixed-use, multi-family, senior, or special population housing. The Partner, working in collaboration with the GDPM, will have responsibility for design, master planning, financing, pre-development and final development activities in accordance with an agreed upon plan for each project. Each plan will vary based upon the scope of the project and the skill-set of each partner.

GDPM has three residential developments under immediate consideration in Montgomery County. Two of the sites are located within the City of Dayton and one site within the City of Kettering:

1. The first Dayton site contains two parcels. One parcel is owned by GDPM and is approximately 1.9 acres. The second parcel will be acquired by GDPM and is approximately .75 acres. The parcels are contained within the same neighborhood, however not contiguous to one another.
2. The second Dayton site is owned by Dayton Public Schools, GDPM anticipates acquiring this site from DPS through the City of Dayton. The site is approximately 8 acres.
3. The third site is located within the City of Kettering and is approximately 2 acres. GDPM anticipates acquiring the site from the City. The desired use for this site is mixed income and/or mixed use development.

GDPM is seeking a development partner to assist with developing the highest and best use of the identified sites through a feasibility analysis. GDPM will also consider sites located in other areas of Montgomery County, particularly sites that provide a diversity of amenities and population.

Interested individuals, firms or entities with a record of success in the development of mixed-finance developments, particularly those with experience in low income housing tax credit (LIHTC), bond financing, the U.S. Department of Housing and Urban Development's (HUD) public housing resources, including HUD's Rental Assistance Demonstration Program (RAD), are encouraged to respond.

Scope of Services:

GDPM issues this RFQ to procure development services for all phases of planning and development required for the development or rehabilitation of specific properties to be determined by the GDPM and the selected partner. Depending upon the assigned project, the Partner will be designated responsibility for managing portions of the development process. GDPM anticipates maintaining a significant role in the development process and therefore anticipates sharing in the development proceeds, based upon assigned roles. The Partner may have responsibility for a number of specific tasks either independently or in conjunction with other members of a development team. The responsibilities of the selected developer may include, but are not limited to, the following:

1. Undertake pre-development activities including design concepts, environmental testing, architectural and engineering, site analysis including of the condition of existing utilities, zoning and other development approvals, market analysis, land acquisition opportunities and financial feasibility;
2. Develop architectural plans consistent with federal, state and local guidelines, and obtain all necessary approvals and permits;
3. Develop a project budget (both capital and operating);
4. Obtain additional leveraged funds from both government and private sources;
5. Provide all necessary financial guarantees and assurances to assemble a financing package;
6. Prepare a Low Income Housing Tax Credit application;
7. Develop and manage an implementation schedule;
8. Coordinate all development activities, including reporting and budget requirements, with GDPM;
9. Determine a general management structure, prepare a management plan for the development and recommend a property manager subject to approval by GDPM;
10. Develop and implement a "Section 3" resident employment program;
11. Assist with the coordination of acceptable procurement, construction contract administration/monitoring and accounting of all project costs;
12. Oversee construction and ensure timely completion;
13. Prepare marketing materials and coordinate marketing/application/pre-leasing/pre-sales process
14. Assist with organizing property management
15. Assist GDPM in the preparation and proposal of any necessary HUD Mixed-Finance Proposal and all required evidentiary materials; and
16. Deliver a project consistent with program guidelines.

The HUD field office must approve all development proposals per 24 CFR 941. The developer will be required to assist with providing applicable information for submission proposal to HUD. Such information includes, but is not limited to, an Environmental Phase I Assessment, Fair Housing Standard data, ALTA Survey, project cost, development schedule, schematic design, and an ALTA Performa Title Policy, initial design drawings.

Each respondent must have demonstrated experience and expertise in the following:

- Developing operating financial proformas
 - Gross potential rent projections
 - Effective gross income projections
 - Expenses and net operating income projections
 - Debt service and cash flow
 - Developer return on equity
 - Annual debt summary
- Developing project development budgets
 - Rents and Incomes
 - Operating Expenses
 - Outside financial sources, including loans, grants, and tax credits
 - Gap analysis
- Developing conceptual building layouts and elevation
- Developing conceptual site plans
- The redevelopment or revitalization of neighborhoods

- Maximizing the use of various financing vehicles/tools
- The development of housing that incorporates tax credit and affordable housing financing
- Applicable regulatory compliance issues, including but not limited to, Fair Housing, Uniform Fair Housing Accessibility Standards, The Rehabilitation Act of 1973, HUD guidelines for construction at 24CFR941, etc.
- MBE, WBE and Section 3, planning and compliance
- Working with local government authorities that regulate the permits and utilities necessary for revitalization efforts.

GENERAL INFORMATION

Introduction:

Greater Dayton Premier Management is a metropolitan housing authority organized and existing under the Ohio Revised Code Section 3735.27, et seq., and is governed by the U.S. Housing Act of 1937, as amended, and subject to regulation under Title 24 of the Code of Federal Regulation. GDPM maintains 75 public housing developments containing 2,677 public housing units and 3,990 housing choice vouchers throughout Montgomery County, OH.

The mission of GDPM is to “**develop housing solutions** for individuals, seniors and families. We seek to **improve neighborhoods** by offering diverse housing options. We require that our families, employees and partners **demonstrate responsible character**, which strengthens the economic health, vitality, and humanity of the Miami Valley.”

GDPM is committed to a fifteen percent Minority Business Enterprise (MBE) participation goal, it is GDPM's intent that fifteen percent of all contract funds be awarded to MBE firms. The firms submitting are encouraged to include MBE participation to the maximum extent possible. The agency is also committed to its Section 3 participation goal for all professional service contracts, which constitutes 3 percent of the total contract amount.

2015 Time Table:

September 24	Date RFQ was released
September 29	Deadline for written questions
October 2	Deadline for written responses to vendors
October 26	Proposal Due Date 3:00 p.m.
November 2 (week of)	Potential Interview/Presentation dates (if necessary)
November 18	Board Meeting – Approval to award contract(s)

Contact Persons:

Xavier Gullatte
 Compliance Department
 400 Wayne Avenue
 Dayton, OH 45410
 compliance@gdpm.org, (937) 910-7613 Fax: (937) 910-7628

Vendor Disclosures

Vendor must provide disclosure of any pending or threatened court actions and/or claims against the Vendor. This information may not cause rejection of the proposal; but withholding the information may be cause to reject the proposal.

Conflict of Interest

No vendor will promise, or give to any GDPM employee anything of value that could influence that employee in their decision on awarding contracts. No vendor will try to influence an employee of GDPM to violate any procurement policies of the agency, the Ohio Revised code, or Federal Procurement Regulations.

Examination of the RFQ

Vendors are expected to be familiar with the entire RFQ. The vendor is expected to respond to the RFQ in a manner that makes it clear they understand and have responded to all sections of the RFQ.

If a vendor discovers any mistakes or omissions in the RFQ they must notify GDPM's Contact Person in writing. Clarifications and corrections will be sent to all vendors who have registered with the agency for the RFQ.

Changes to RFQ

Changes will be posted at www.gdpm.org

Non-Appropriation Clause

The proposed services will be subject to termination in the subsequent fiscal years if the sufficient funds are not appropriated and budgeted or are not otherwise available to continue making payments for the equipment of other services performing similar functions and services.

Termination

GDPM reserves the right to terminate an agreement without prior notification for reasons it deems in the best interest of GDPM. If terminated, GDPM will notify the contractor of the termination in writing by certified mail, return receipt requested, and shall pay contractor for services rendered prior to contractor's receipt of the Notice of the Agreement Termination.

Holidays

GDPM recognizes the following holidays as vacation days for its employees:

New Year's Day	Labor Day
Martin Luther King, Jr. Birthday	Veteran's Day
President's Day	Thanksgiving Day
Good Friday	Day after Thanksgiving
Memorial Day	Christmas Eve
Independence Day	Christmas Day

TERMS & CONDITIONS

The RFQ and the commitments made in the selected proposal will become contractual obligations, if a contract ensues. Failure to accept these obligations may result in cancellation of the award.

Type of Contract

The evaluation of proposals in response to this RFQ may result in the issuance of a contract. The contract will incorporate the requirements of the RFQ, the Respondent's proposal, and all other agreements that may be reached, including a development/developer and management agreement for each project.

If the Respondent proposes an alternative approach, describe the contractual protection offered to ensure successful implementation of the project. If the Respondent proposes a multi-vendor or sub-contract approach, clearly describe the responsibilities of each party and the assurances of the performance you offer. The successful Respondent's proposal, this RFQ, and other applicable addenda will become part of the final contract and will merge into the contract.

Contract Period – Funding & Invoicing

The term of this agreement will be from issuance of a Notice to Proceed until project completion.

The vendor can claim payment only for services already provided, in amount determined by the negotiated rate. Reimbursement by GDPM is made within 30 days of receipt of invoices and any required documentation.

Confidentiality & Security

Any vendor that has access to confidential information will be required maintain confidentiality.

PROPOSAL SUBMISSION

Preparation of Proposal

Proposals must provide a clear picture of the Respondent's qualifications to provide the services required in the RFQ. The vendor should respond to the RFQ instructions and requirements.

All proposals become property of GDPM. All proposals will be considered public information and will be open for inspection.

Proposal Development Cost

The cost of creating proposals is the responsibility of the Respondent and shall not be chargeable to GDPM.

False or Misleading Statements

Proposals containing false or misleading statements may be rejected.

Vendor Representative's Signature

Vendor Representative's Signature an officer of the Respondent, who is legally authorized to enter into a contractual relationship on behalf of the Respondent, must sign the submission package. The Respondent(s) must affix the organization's corporate seal to these documents. In the absence of a corporate seal, a Notary Public must notarize the submission package signature. The signature must indicate the title or position the individual holds in the Respondent's organization. Any and all unsigned proposals will be rejected.

Delivery of Proposals

- **One bound original** and **four (4)** complete, bound copies (5 total copies). The original should be marked "original" and copies marked "copy";
 - All bound copies must be tabbed and include a table of contents, along with an executive summary;
 - All bound copies should state the Respondents name, address, telephone number, e-mail, due date and RFQ title: "**RFQ #15-001: Developer Services**";
- **One electronic copy** via USB/Flash Drive or CD.
- Submit proposals to GDPM's Contact Person and address listed on the cover page of the RFQ.

The completed proposal package must be received by **3:00 p.m. Eastern Standard Time (EST), on Monday, October 26, 2015**. A receipt will be issued for all proposals received. Proposals received after the deadline will not be considered. If mailed, the vendor should use certified or registered mail, UPS, or Federal Express with return receipt requested. Faxes or electronically mailed proposals will **not** be accepted.

All Respondents must carefully review their final proposals. Once opened, proposals cannot be modified; however GDPM may request information or respond to inquiries for clarification purpose only.

All Respondents submitting must agree to honor the terms and conditions contained herein for a period of one-hundred and eighty (180) days.

Acceptance and Rejection of Proposals

GDPM reserves the right to accept or reject any or all proposals, to take exception to the RFQ specifications, or to waive any formality. Respondents may be excluded from further consideration for failure to comply with the specifications of this RFQ. The recommendation of GDPM staff, GDPM Chief Executive Officer and GDPM's Board of Housing Commissioners shall be final.

No Proposal

If a respondent wishes to remain on the contractor's mailing list, but is not submitting a proposal, the "No Proposal/Offer" form (contained in this RFQ) must be returned by the stated proposal closing date. Mark the form "No Proposal" and explain the reason for non-submission. Failure to respond three times in succession, without justification, shall be cause for removal of the contractor's name from GDPM's mailing list.

Withdrawal of Proposal

Proposals may be withdrawn by written request submitted by the Respondent prior to the RFQ opening date. Negligence on the part of the Respondent in preparing the required documents confers no right of withdrawal or modification of proposal data after such documents are opened.

Evaluation and Award of Contract

Using the qualification based selection (QBS) method, GDPM will select the highest-ranked respondent(s) based upon the technical factors outlined in the RFQ (see Evaluation Criteria). Price is not evaluated as a selection factor under the QBS method. Under QBS procedures, following the selection of the highest ranked respondent, negotiations are open with the intent to reach an agreement on fair and reasonable pricing.

GDPM reserves the right to waive any minor irregularity or technicalities in the proposals received. GDPM reserves the right to award without discussion(s) and may make an award to multiple vendors. The QBS process will involve the ranking of Respondents by the appointed GDPM evaluation committee.

The review process will be conducted in three parts.

Preliminary Proposal Review

The preliminary review will consist of a review to be sure the proposal meets the minimum requirements specified in the RFQ. Proposals not meeting the minimum requirements will be disqualified.

Proposals must meet the following requirements:

- The proposal must be received at the address indicated in the RFQ no later than 3:00 p.m. EST, on Monday, October 26, 2015. Proposals not received at the designated address by the specified date will be rejected.
- Required number of copies submitted.
- Proposal signed by authorized vendor representative.
- Proof of errors and omission insurance.
- Proposals that pass the initial review will be considered valid proposals and proceed to the final review; those that do not, will be rejected.

Initial Review

- All valid proposals will be reviewed, evaluated, and rated by the Review Committee. The Review Committee will be composed of GDPM staff.
- The Review Committee will evaluate each proposal against the criteria in the RFQ. During the review, the Committee may request additional information from the Respondent. Such requests and subsequent responses must be in writing.
- All qualified proposals shall be reviewed by the Review Committee using a standard Proposal Review Evaluation Rating Sheet tailored specifically for this RFQ. The number of evaluation points for each Evaluation Factor is detailed in the Evaluation Criteria.
- Top ranked Respondents may be asked to appear for an interview or conduct a presentation.

Final Review/Negotiations

The Review Committee may request information from sources other than the written proposal to evaluate Respondents qualifications. Other sources of information may include oral presentations by Respondents, written responses to clarifying questions posed by the Review Committee, and references.

The Review Committee's Evaluation Sheets will be tabulated into one document and organized by highest to lowest score. The list will be maintained on file by GDPM.

Following the initial review, GDPM will select one or more Developer Service organizations to serve as Developer(s) of record. As assignments become available, Developer's of record will be asked to submit cost, a development plan, and time information. A Developer will be selected for assignments based upon skill-set match for the identified project, projected timeline, fee schedules, site familiarity, and other factors as they pertain to individual tasks.

Post-bid Meeting

If a Respondent wishes to discuss the selection process, the request for an informal meeting must be submitted in writing within five (5) working days following receipt of notification of the decision. The request shall state the reason(s) for the meeting, citing the law, rule, regulation or RFQ procedures on which the request is based. All requests must be signed by an individual authorized to represent the vendor and addressed to the GDPM Contact Person.

EVALUATION CRITERIA

The evaluation criteria to be used in reviewing proposals and their respective weights are as follows:

NO.	FACTOR	MAXIMUM POINTS
1	<p>Professional Qualifications and Experience. Demonstrated experience in successful completion of mixed income, mixed use public/private partnership developments. Developers must demonstrate their experience related to the items detailed in the scope of work of this RFQ.</p>	25
2	<p>Technical Competence & Capacity of the Development Team. The degree and nature of resources that the proposed development team can dedicate to the timely development and completion of a mixed finance/income project.</p> <p>Familiarity with requirements applicable to HUD public housing financing/mixed –finance development and public housing operation. Must demonstrate ability to execute complex mixed finance transactions.</p> <p>Expertise in construction management to provide high quality, within budget, and on time delivery for energy efficient housing.</p> <p><i>Note: Current project schedule and availability of the development team will be considered. References may be consulted to confirm the Respondents time-management skills. What percentage of the development teams past construction projects remain within or under budget? How well has the development team projected rents, incomes and expenses in past development proformas?</i></p>	20
3	<p>Developer Financial Capacity. The financial capacity of the respondent as evidenced by appropriate financial information.</p> <p>The ability to obtain structure and implement layered public and private financing (including Low Income Housing Tax Credits).</p> <p>Financial capacity of the developer/provider of guarantees.</p>	20
4	<p>Leveraging of GDPM Funds. Preference will be given to past projects demonstrating the development team’s ability to maximize public investment through the leveraging of additional resources.</p> <p><i>Note: How successful is development team in filling development budget gaps?</i></p>	15
5	<p>Historical Performance. Successful experience in the design, construction and/or ownership of mixed-income and mixed-use housing development projects. Demonstration of successful completion of similar past projects. (25 points)</p> <p><i>Note: Experience with Public Housing facilities will be factored into the evaluation. References will be considered. Unresolved HUD findings or complaints will be considered. Reviewers will specifically consider the Respondents past performance and the ability to quickly resolve and respond to unexpected problems.</i></p>	15

6	RAD: Experience with development projects utilizing HUD's Rental Assistance Demonstration Program.		5
<u>11 Section 3</u>			
Category 1 Business	15 pt.	51% or more of the business is owned by public housing residents of a specific public housing community for which the Section 3 covered assistance is expended	15
Category 2 Business	12 pt.	51% or more of the business is owned by residents of a public housing community or communities within GDPM for which the Section 3 covered assistance is not being expended.	
Category 3 Business	9 pt.	<ul style="list-style-type: none"> • 51% or more of the business is owned by Section 3 eligible residents and/or • Will subcontract in excess of 25% of the total amount of subcontracts to category 1 or 2 Section 3 businesses 	
Category 4 and 5 Business	6 pt.	Full time, permanent workforce includes 30% or more of Section 3 eligible residents. An entity selected to carry out HUD Youth Build program in Montgomery County in which Section 3 covered funding is expected	
Category 6 Business	3 pt.	Joint venture with inclusion of Section 3 business is a form of organization where: Section 3 business is responsible for a clearly defined portion of the work to be performed, holds management responsibilities in the joint venture, performs at least 25 percent of the work and is contractually entitled to compensation proportionate to its work.	
Total Maximum Points			115 Points

PROPOSAL FORMAT

Please refer to the “Delivery of Proposals” section for specific instructions on the number and type of proposal copies to submit. To simplify the process for evaluation, and to assure each proposal receives the same review, all responses must be submitted in the following format. Proposals must contain all the items listed.

Proposal sections must be numbered corresponding to the following format and lettering:

TABLE OF CONTENTS

A. LETTER OF TRANSMITTAL /EXECUTIVE SUMMARY

A letter of transmittal (preferably on letterhead) bearing the signature of an authorized representative of the firm and the name(s) of the individual(s) authorized to negotiate services and costs with GDPM.

B. ORGANIZATION & STRUCTURE OF THE TEAM

Information regarding the company: size, structure, history and any relevant certifications as Minority-owned, Female-Owned, Small, Disadvantaged Business Enterprise or as a Section 3 business. Indicate qualifications in partnering with non-profit, as well as MBE and Section 3 organizations. Submit an organization chart for the Respondent.

Resumes of the key individuals (staff to be assigned to work with GDPM) should be included with a description of the responsibilities that they will be required to perform. GDPM is interested in assessing the capacity and capability of teams and their ability to perform. Additionally, GDPM will assess the capability of the project manager, the lead individuals in each discipline, and the design team.

C. EXPERIENCE OF TEAM MEMBERS:

All proposed members of the development team must be identified, indicating their specific contribution to the team. Respondents are encouraged to include a team of specialists for all components of a development project including design, construction, legal, financing, and management services. Ultimately, the identified team leader will be held responsible for the performance of all members of the development team.

Descriptions of relevant experience should be provided for each member of the development team. Descriptions should include:

- Prior experience of the individual project team members, education, position in the firm, years within the firm and experience acquired, continuing professional education, state(s) in which licensed (if applicable).
- Overall supervision to be exercised, including procedures for managing subcontractors

D. SCOPE OF SERVICES

State specifically your intended practices addressing the materials in the “Scope of Services.” Please cite previous examples of providing such services and your organization’s commitment to meeting or exceeding the expectations and duties set forth. Leverage (Factor 4 of the Evaluation Criteria) can be addressed in this section.

E. FINANCIAL STATEMENT

Please provide one (1) copy of the last two (2) years of financial statements of the Respondent. These statements should demonstrate the financial capacity of the Respondent, or the entity that would most likely be responsible for executing all applicable guarantees. Financial statements may be submitted in a separate, sealed envelope (1) one (copy only) marked “**Financial Statements – Confidential.**”

F. PAST PROJECTS

A list of the most recent development projects completed. Include a brief description, total development costs including sources & uses, along with performance measures such as budget performance, completion schedule, and occupancy rates. If projects have included RAD, other special programs, please identify in this section.

G. REFERENCES

Respondents must submit at least 3 references for the team leader and 3 such references for each of the other major team participants. Provide a list of past or current projects where the proposed development team has demonstrated its qualifications in any or all the activities requested under this RFQ. The list must include the name, title, organization, address, telephone, and email of the person most familiar with the work completed. Items F & G can be combined in one document.

H. INSURANCE

A statement of liability insurance from an accredited insurance company/agent is required. A minimum of \$500,000.00 liability insurance coverage is required should your firm be chosen. **In this section, please include evidence that the Developer organization is currently registered in the State of Ohio and carries Errors and Omissions insurance.**

I. EXHIBITS

All other required information is set forth by each of the following exhibits. Please tab and label each exhibit individually. **Any Exhibits left out are not required. Exhibits may be located at <http://www.gdpm.org/doing-business>**

Exhibit A..... HUD Form 5369-C Certifications and Representations of Offerors (*Be sure to fill in completely.*) *This form must be completed by any/all subcontractors.*

Exhibit B..... Minority Business Enterprise (MBE/WBE/ (DBE/SBE)/EDGE/VBE) Utilization (*You must read this form prior to proposal submittal; however it is to be filled out as applicable, only if using subcontractors*)

Exhibit C.....Section 3 Compliance and Goals, Certification, Clause and Sample Plan (*You must read and fill out this form prior to proposal submittal*)

Exhibit D Non-Collusive Affidavit and Disclosure Statement

Exhibit E..... Equal Employment Opportunity Affirmative Action Statement (*Be sure to fill in completely.*)

Exhibit F Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion

Exhibit H Certification for a Drug-Free Workplace

Exhibit IStatement of Bidder’s Qualifications (*You may use your own paper and format, so long as you follow the numbering as given...the form must be notarized*)

Exhibit J Reference Release Forms (5) (*Do not list any person with GDPM as a reference.*)

END of RFQ 15-001