

**The City of Santa Fe (City), Central Purchasing Division (CPD)
AND
Office of Affordable Housing (OAH)**

REQUEST FOR PROPOSALS (RFP)

Affordable Housing Trust Fund (AHTF)



RFP# 26006

Proposals are due on: August 1, 2025

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I. INTRODUCTION

A. PURPOSE OF THIS RFP

The purpose of this Request for Proposals (RFP) issued by the Central Purchasing Division (CPD) in coordination with the Office of Affordable Housing (OAH) is to solicit sealed proposals through a competitive process to establish contracts for projects that advance affordable housing in the City of Santa Fe. This RFP is focused on supporting eligible costs associated with the **acquisition, development, construction, renovation, conversion, financing, operation, or ownership** of affordable housing—or related supporting infrastructure.

All proposed projects must align with the community’s established affordable housing goals and priorities, as defined under the Affordable Housing Trust Fund (AHTF) and related City plans and policies. As codified in **Santa Fe City Code (SFCC) 26-3**, the primary purpose of the AHTF is to **increase and preserve the supply of affordable housing** for low- and moderate-income residents in the City of Santa Fe.

The AHTF supports a range of eligible activities organized into two tiers:

Tier 1 – Housing Development and Preservation (Infrastructure-Focused)

Projects that involve the creation, rehabilitation, or preservation of affordable housing units, including associated infrastructure necessary to support housing development.

Tier 2 – Housing Support and Stability (People-Focused)

Programs and services that promote long-term housing stability for residents—such as rental assistance, housing counseling, or supportive services that help people remain housed.

Funding Preference

To advance the City’s long-term affordable housing goals, **funding preference will be given to Tier 1 applications**—those focused on the development or preservation of physical housing. These proposals will be weighted more heavily during the evaluation process due to their direct alignment with the City’s strategic priorities for increasing the supply of affordable homes.

B. BACKGROUND INFORMATION

The **New Mexico Affordable Housing Act** (The “Act”) and its implementing regulations, establish the framework for eligible uses of funds, applicant eligibility criteria, and proposal requirements to ensure compliance with the **State of New Mexico’s Anti-Donation Clause**. Oversight and enforcement of the Act are administered by the **New Mexico Mortgage Finance Authority (MFA)** through the Affordable Housing Act Rules.

Under the Act, the **City is authorized to support** the following costs related to affordable housing initiatives:

- Acquisition of land on which affordable housing will be constructed;
- An existing building that will be renovated, converted, or demolished and reconstructed as affordable housing;

- Costs related to the acquisition, development, construction, financing, operation, or ownership of affordable housing;
- Costs of financing or infrastructure necessary to support affordable housing.

In addition to the uses identified above, funding may also be used to support:

- Down Payment Assistance (DPA) programs;
- Temporary housing and emergency shelters;
- Case management and programmatic services that contribute directly to housing stability or the successful transition to permanent affordable housing.

All proposals must demonstrate consistency with the “Act” and the “Rules”, and clearly identify how the requested funding supports the development, sustainability, or facilitation of affordable housing in accordance with applicable legal requirements.

Awards under this RFP are subject to the availability of funds in the AHTF. All allocations are contingent upon current and projected revenue into the Fund from designated sources, as well as annual budget appropriations approved by the City’s Governing Body. The **Community Development Committee (CDC)** will review eligible proposals and make formal recommendations to the **City’s Governing Body**, which retains final authority on funding awards.

C. SCOPE OF PROCUREMENT

The City of Santa Fe’s OAH seeks to identify and contract with qualified organizations capable of delivering eligible affordable housing activities as outlined under the AHTF. This includes both physical housing projects and supportive programs that advance housing stability.

This procurement will result in **formal contracts** between the City and selected applicants. These contracts may support a range of housing-related activities—including development, rehabilitation, acquisition, infrastructure, and housing support services—provided they meet program guidelines and demonstrate alignment with the Affordable Housing Act and City housing priorities.

Applicants must have relevant technical or programmatic experience. For service-based proposals, demonstrated experience working with diverse populations—particularly low-income residents, seniors, people with disabilities, and those at risk of homelessness—is strongly encouraged.

This solicitation may result in multiple awards. All funded projects will be subject to formal contract terms, performance monitoring, and compliance with reporting and fiscal accountability standards.

D. PROCUREMENT MANAGER

OAH has assigned a Procurement Manager who is responsible for the conduct of this procurement whose name, address, telephone number, and email address are listed below:

Name: Rocio Gosende, Procurement Manager
 Telephone: (505) 629-7379

1. **Any inquiries or requests** regarding this procurement should be submitted, in writing, to the Procurement Manager AND the CPD at the following emails:

Procurement Manager: rmgosnde@santafenm.gov

CPD: purchasing_RFP@santafenm.gov

Applicants/Offerors may contact **ONLY** the Procurement Manager and the CPD regarding this procurement. Other city employees or Evaluation Committee members do not have the authority to respond on behalf of the Procurement Manager. Do not contact the Procurement Manager after the Proposals' due date.

2. **Protests of the solicitation or award must be submitted in writing to the Protest Manager.** As a Protest Manager has been named in this RFP, pursuant to NMSA 1978, Section 13-1-172 and Procurement Manual Section Y, **ONLY protests delivered directly to the Protest Manager in writing and in a timely fashion will be considered to have been submitted properly and in accordance with statute, rule, and this RFP** Protests submitted or delivered to the Procurement Manager will **NOT** be considered properly submitted.

E. PROPOSAL SUBMISSION

Submissions of all proposals must be accomplished via upload:

<https://santafenm.munisselfservice.com/vss/>

or

<https://procurement.opengov.com/portal/santafenm>

F. DEFINITION OF TERMINOLOGY

This section contains definitions of terms used throughout this procurement document, including appropriate abbreviations:



G. PROCUREMENT LIBRARY

A procurement library has been established. Offerors are encouraged to review the material contained in the Procurement Library by selecting the link provided in the electronic version of this document through your own internet connection. The library contains information listed below:

Electronic version of RFP, Questions & Answers, RFP Amendments, etc.

<https://santafenm.munisselfservice.com/vss/>

<https://procurement.opengov.com/portal/santafenm>

:

Other relevant links:

https://library.municode.com/nm/santa_fe/codes/code_of_ordinances?nodeId=CHXXVIHO_26-3AFHOTRFU

II. CONDITIONS GOVERNING THE PROCUREMENT

This section of the RFP contains the sequence of events, the descriptions of each event, and the conditions governing this procurement.

A. SEQUENCE OF EVENTS

The City's CPD and the Procurement Manager will make every effort to adhere to the following schedule:

Action	Responsible Party	Due Dates	Times (in Mountain)
Issue RFP	CPD	July 10, 2025	
Pre-Proposal Meeting	Procurement Manager/Potential Offerors	July 18, 2025	9:00 AM – 10:30 AM
Deadline for Written Questions	Potential Offerors	July 22, 2025	5:00 PM
Response to Written Questions	Procurement Manager	July 24, 2025	
Proposals Due Date	Offerors/Applicants	August 1, 2025	3:00 PM
* Evaluation	Evaluation Committee	August 1 – August 5, 2025	
*First Clarification Meeting (CDC - 1 st executive session)	Evaluation Committee/Finalist Offerors	August 6, 2025	1:00 PM-5:00 PM
*Final Clarification	Evaluation Committee/Finalist Offeror	August 7-19, 2025	
*Best and Final Offers	Offerors	August 7-19, 2025	
*Recommendation of Award (CDC – 2 nd executive session)	Evaluation Committee	August 20, 2025	3:30 PM-5:00 PM
*Governing Body Approval	Governing Body	August 27, 2025	
*Contract Award	Requesting Department	September 1, 2025	

*Dates indicated after "Proposals Due Date" are estimates only and may be subject to change without necessitating an amendment to the RFP.

B. EXPLANATION OF EVENTS

The following paragraphs describe the activities listed in the Sequence of Events.

The City reserves the right to:

1. Change or extend the Proposals Due Date.
2. Revise the RFP document prior to the due date.

The city will process addenda if it is determined that modifications, clarifications, or additions to the RFP are necessary. Addenda will be announced via email to registered Potential Offerors that have selected the corresponding commodity codes used for this event.

1. Issue RFP

This RFP is being issued on behalf of the City's OAH on the date indicated in the Sequence of Events.

2. Pre-Proposal Meeting

An in-person Pre-Proposal meeting will be held at **The Lodge located at 750 N. St. Francis Drive, Santa Fe, NM 87501** as indicated in the Sequence of Events. Doors will open at 8:30 AM. For those who are unable to attend in person, a virtual option is available via Zoom: Join Zoom Meeting <https://santafenm-gov.zoom.us/j/84626428975?pwd=5rPtBQAnWRuoFEtVlV7ahT8yNYNGu.1>

Meeting ID: 846 2642 8975

Passcode: 825810

Potential Offerors are encouraged to submit written questions in advance of the conference to the CPD and the Procurement Manager. The identity of the organization submitting the question(s) will not be revealed. Additional written questions may be submitted at the Meeting. All questions answered during the Pre-Proposal Meeting will be considered **unofficial** until they are posed in writing. All written questions will be addressed in writing on the date listed in the Sequence of Events. A public log will be kept of the names of potential Offerors that attended the Pre-Proposal Meeting.

Attendance at the non-mandatory Pre-Proposal Meeting is strongly recommended, as it will help Offerors understand the key information required in their proposals and provide a detailed explanation of the evaluation process.

3. Deadline for Written Questions

Potential Offerors may submit written questions to the CPD and the Procurement Manager as to the intent or clarity of this RFP as indicated in the Sequence of Events. All written questions must be addressed to the CPD and the Procurement Manager. Questions shall be clearly labeled and shall cite the Section(s) in the RFP or other document which form the basis of the question.

4. Responses to Written Questions

Responses to the written questions will be provided on [Bid Central](#) and OpenGov on or before the date indicated in the Sequence of Events, and is available for all potential Offerors.

5. Proposals Due Date

Proposals must be uploaded and submitted in [BID Central](#) or OpenGov before the deadline indicated in the Sequence of Events to be considered for review and evaluation.

All proposals must be submitted electronically through the designated upload link(s) provided in the Response Format and Organization section. Proposals submitted by any other method will not be accepted.

Bid Central and OpenGov will maintain a log of all submitting organizations. In accordance with NMSA 1978, Section 13-1-116, the contents of proposals remain confidential and will not be disclosed to competing Offerors during the negotiation process.

The negotiation process remains in effect until the contract is awarded.

For the purposes of this RFP, awarded means the contract has been approved by the City's GB and subsequently signed by the City Mayor.

6. Evaluation

This document outlines how the City of Santa Fe will evaluate proposals submitted under this RFP for AHTF funding. The process is designed to ensure **transparency, accountability, and alignment with community goals**. All proposals will be reviewed and scored by the City's Evaluation Committee, using the criteria outlined in this RFP and referenced in **Attachments G(1) and G(2)**.

Following initial scoring, the City may enter a **Clarification Phase** with one or more Offerors. This phase allows for follow-up questions, discussions, and deeper understanding of proposed projects, especially in areas where more detail is needed to inform decision-making. The Clarification Phase helps ensure that any recommended funding reflects the **best overall value** to the City.

Depending on the proposal, this phase may include one or both of the following:

7. First Clarification Meeting

This meeting serves as an opportunity for the Evaluation Committee to:

- Ask specific questions about the submitted proposal
- Clarify key aspects of the project scope, timeline, budget, or team
- Confirm alignment with program goals and City requirements

Offerors may be asked to submit updated information, supporting documentation, or a **Best and Final Offer (BAFO)** following this meeting.

8. Final Clarification

This clarification may be held at the end of the Clarification Phase to summarize all updates, adjustments, and mutual understandings reached between the Offerors and the City. The Procurement Manager may reach out via email or phone to request clarification on any materials identified by the CDC, that require further explanation to support decision-making. It serves as a final confirmation of the scope, timeline, and terms discussed.

All major questions, documents, and project refinements should be addressed **prior to this phase**. City staff and stakeholders may submit final clarifying questions in advance.

9. Best and Final Offers

This RFP process may include a **Best and Final Offer (BAFO)** stage for finalist Offerors. While Offerors are expected to submit their most competitive proposal—including pricing—during the initial submission, the City reserves the right to request revised proposals from select finalists.

BAFOs may be requested following the First Clarification Meeting and will be subject to the timeline outlined in the **Sequence of Events**, or an accelerated schedule if necessary. The purpose of the BAFO is to allow Offerors to:

- Submit revised pricing or updated project elements

- Clarify key proposal components
- Strengthen alignment with evaluation criteria and funding goals

Offerors may also amend their proposal based on feedback provided during the Clarification Phase.

Following the First Clarification, the **Evaluation Committee, Procurement Manager, and Assigned CPD Buyer** will review updated submissions and verify proposal accuracy. This may include conducting **reference checks** to assess past performance, reliability, and capacity to meet contract requirements. Additional follow-up or clarification may be requested before the City finalizes funding recommendations.

10. Recommendation of Awards

The CDC will enter Executive Session to discuss the recommendation of awards. Following the Executive Session, they may return to open session to announce their vote for the recommended awards, stating only the vendor names and the amounts.

11. Governing Body Approval

In accordance with **NMSA 1978, Section 13-1-117**, responsible Offerors whose proposals are most advantageous to the City—considering the evaluation factors in this RFP—will be recommended for award. However, a serious deficiency in any evaluation factor may result in disqualification regardless of overall score.

Depending on the total compensation, including any term extensions of the contract, either the City manager will approve and sign the contract, or it will be presented as an agenda item for the appropriate Committee Meetings and then the Governing Body for approval. The mayor signs all contracts presented to and approved by the Governing Body.

12. Contract Award

The City reserves the right to make an award in the manner deemed most advantageous to the City and aligned with public interest. Specifically, the City may:

- Award to one or more Offerors;
- Award full proposals as submitted;
- Award portions of one or more proposals;
- Select components or features from multiple proposals to create a composite award;
- Negotiate certain terms or clarify elements of proposals prior to finalizing awards;
- Reject any or all proposals;
- Cancel or re-issue all or portions of the RFP if it is in the City's best interest to do so;
- Make no award under this RFP.

The highest-scoring proposal may not necessarily be awarded a contract. Final selection is based on a combination of proposal quality, alignment with City objectives, best value, and the City's sole discretion.

Contractors must not commence work until the City issues a Purchase Order.

13. Finalize Contracts

After approval of the Evaluation Committee Report, the City will make every effort to award contracts by the deadline set forth in the Sequence of Events. Any contracts resulting from this RFP will be finalized with the most advantageous Offerors, considering the evaluation factors outlined in this RFP and the best interests of the City, as defined in the Scope of Procurement section. The most advantageous proposal may or may not have received the highest point total. If mutually agreeable terms cannot be reached with the apparent most advantageous Offeror within the specified timeframe, the City reserves the right to finalize a contract with the next most advantageous Offerors without initiating a new procurement process. The City may award one or multiple contracts, as determined to be in the City's best interest.

14. Protest Deadline

Any protest by an Offeror pertaining to the solicitation or award must be submitted within 15 days from the notice of solicitation or award and in conformance with NMSA 1978, Sections 13-1-172 and applicable procurement regulations. As a Protest Manager has been named in this RFP, pursuant to NMSA 1978, Section 13-1-172 and Procurement Manual Section Y, ONLY protests delivered directly to the Protest Manager in writing and in a timely fashion will be considered to have been submitted properly and in accordance with statute, rule, and this RFP. The 15-calendar day protest period shall begin on the day following the notice of award of contracts and will end at 5:00 pm MST/MDT on the 15th day. Protests must be written and must include the name and address of the protestor and the RFP number. It must also contain a statement of the grounds for protest including appropriate supporting exhibits and it must specify the ruling requested from the party listed below. The protest must be delivered to:

Travis Dutton-Leyda, Chief Procurement Officer
City of Santa Fe
tkduttonleyda@santafenm.gov

PROTESTS RECEIVED AFTER THE DEADLINE WILL NOT BE ACCEPTED.

C. GENERAL REQUIREMENTS



GENERAL
REQUIREMENTS.doc

III. RESPONSE FORMAT AND ORGANIZATION

A. NUMBER OF RESPONSES

Offerors shall submit only one proposal in response to this RFP. Proposals may contain offers for Tier 1, Tier 2, or both Tier 1 and Tier 2.

B. NUMBER OF COPIES

ELECTRONIC SUBMISSION ONLY

Offerors must submit proposals in response to this RFP through the Bid Central link or OpenGov. Only one electronic copy of each part of the proposal, Public or Confidential (when necessary) should be submitted, as outlined below.

Offerors' proposals should be submitted as separate uploads, as outlined in this section. Each upload should be clearly labeled on the front page as **“Public Proposal,”** or **“Confidential Proposal”** (if the proposal has proprietary or confidential information, Offerors have the option to submit a separate confidential proposal that will not be disclosed to the public after award). A Public Proposal is required. If an Offeror proposes additions or modifications to the City’s draft contract, a third document titled **“Contract Edits”** may be submitted. These proposed changes should align with the guidelines in the **General Requirements** section and be summarized in the draft contract attachment reference.

ELECTRONIC proposal submissions must be fully uploaded via **Bid Central** or OpenGov before the submission deadline. Files **cannot** be password-protected and should be submitted in **PDF format**, unless an **Excel spreadsheet** or another format is specifically requested. Offerors should allow ample time to upload large files to ensure a **complete** and **on-time** submission.

As soon as you see this notice, **verify that you can log in** to your VSS and/or OpenGov account and access the RFP. Do not wait until the last minute to check your login credentials or ensure you can interact with the system. If you encounter login issues, **email CPD and venreg@santafenm.gov immediately** to avoid delays. Allow plenty of time to upload your proposal via Bid Central or OpenGov. If you experience issues, **email CPD and venreg@santafenm.gov or if submitting in OpenGov <https://opengov.com/contact-us/> at least two hours before the deadline.** Issues reported within the final two hours may not be resolved in time. While the City will assist, **timely resolution cannot be guaranteed** if problems arise close to the deadline.

Submissions will be deemed **late** if not **both**:

1. **Fully complete** before the deadline.
2. **Received via the submission link** before the deadline.

Additionally, if submissions are not received on time due to being **captured, blocked, filtered, quarantined**, or otherwise **prevented from reaching the City’s system** by security or anti-virus software, it will still be considered **late** and **will not be accepted**.

If you are working on your submission close to the deadline and the clock strikes **3:00 PM**, the system **will not** accept your submission and may even log you out. This is **not** a system error—it is the result of **waiting too long** to submit. **Offerors are responsible** for planning accordingly and ensuring timely submission.

⚠ REMEMBER TO CLICK THE SUBMIT BUTTON! ⚠

⚠ LATE PROPOSALS MAY NOT BE ACCEPTED ⚠

Any proposal that does not adhere to the requirements of **the Response Format and Organization** section may be deemed non-responsive and rejected on that basis.

C. PROPOSAL FORMAT

Offerors should accurately complete all required forms, adhering to the provided format and any specific instructions within each form. Failure to comply may result in disqualification.

The City requires the following documents to ensure a comprehensive and equitable evaluation process.

Mandatory documents must be included in every proposal. **Desirable documents** should also be provided; if any are missing, Purchasing may request them prior to evaluation. Proposals lacking **rated documents** will receive a score of zero for the corresponding evaluation criteria. If the offeror has proposed edits to the draft contract, they must be submitted as a separate attachment.

Attachment	Form	Value
Attachment A	Proposal Cover Page, Declaration, & Checklist	Desirable
Attachment B	Campaign Contribution Disclosure Form	Mandatory
Attachment C	Conflict of Interest	Desirable
Attachment D	Non-Collusion Affidavit	Desirable
Attachment E	Reference List	Desirable
Attachment F	Project Capability Submittal Checklist and Format	Desirable
Attachment G1	Scope/Level of Expertise Plan (SC/LE) Narrative	Rated
Attachment G2	Investment Impact Metrics & Budget Summary	Mandatory

D. SUBMISSION ELIGIBILITY FOR TIER 1 AND TIER 2

All proposals submitted for Tier 1 (Development & Preservation) or Tier 2 (Housing Support & Stability) must meet minimum eligibility requirements before advancing to the evaluation stage. By submitting a proposal, the Applicant certifies compliance with the applicable standards for their selected tier and acknowledges the ability to complete the project and AHTF contract within 12 to 18 months of award. The City may request additional documentation to verify compliance.

Applicants may include nonprofit housing providers, mission-aligned for-profit entities, community-based organizations, and other qualified agencies. All selected contractors must:

- Be appropriately licensed and insured;
- Comply with all applicable federal, state, and local laws and regulations;
- Demonstrate capacity to manage the scope and scale of the proposed project.

Eligible Applicant Types

Funding through the AHTF is available to developers and sponsors of affordable housing, including:

- Partnerships
- Corporations
- Limited Liability Companies (LLCs)

- Joint Ventures
- Public/Private Partnerships
- Non-Profit Organizations

Eligible entities must:

- Be legally organized under state, local, or tribal law;
- Provide verifiable documentation of legal organization;
- Demonstrate financial capacity and organizational experience sufficient to implement proposed activities.

The City must certify that each Offeror qualifies as a "Qualifying Grantee" per MFA Housing Act Rules, including:

- Proof of organization under applicable laws;
- A functioning accounting system in line with GAAP;
- A mission that includes affordable housing or services to low-to-moderate income individuals;
- For nonprofits, assurance that no net earnings benefit any private individual;
- Full compliance with submittal requirements.

Tier 1: Development & Preservation – Pass/Fail Thresholds

Demonstrated Organizational Capacity

- Operated for at least 3 years
- Completed at least one relevant project in the past 5 years, on time and on budget
- Experience with projects involving multiple public agencies
- Experience using public funds (e.g., AHTF, HUD)

Project Relevance and Feasibility

- Has completed a similar project
- Located within Santa Fe city limits
- Serves households at or below 120% AMI
- Site control is established (ownership, lease, or option)
- Appropriate zoning or rezoning is in progress
- Ready to begin within 12 months
- Affordability maintained for at least 20 years
- Aligns with eligible AHTF uses
- Complies with fair housing, accessibility, and anti-discrimination laws

Legal, Financial, and Administrative Soundness

- No litigation related to fraud/misuse of public funds
- Experience managing government-funded contracts
- No bankruptcy in the past 5 years
- Current on all taxes
- Passed financial audit in the last 2 years or provided a suitable alternative

Tier 2: Housing Support & Stability – Pass/Fail Thresholds

Demonstrated Programmatic Experience

- Provided housing-related services for at least 3 years
- Completed at least one relevant program in the past 5 years, on time and on budget
- Worked with multiple agencies or community partners
- Experience using public funding (e.g., AHTF, HUD)
- Delivered a similar program in size, scope, or target population

Program Eligibility and Feasibility

- Serves Santa Fe residents
- Serves households at or below 120% AMI
- Activities align with eligible AHTF uses
- Complies with fair housing, accessibility, and anti-discrimination laws

Legal, Financial, and Administrative Soundness

- No litigation related to fraud/misuse of public funds
- Experience managing government-funded contracts
- No bankruptcy in the past 5 years
- Current on all taxes
- Passed financial audit in the last 2 years or provided a suitable alternative

IV. EVALUATION

The Evaluation Committee will evaluate and score proposals based on the information provided G(1) and G(2). Proposals will be evaluated according to the criteria listed below, which have been identified as critical to the success of the funding.

The City’s Community Development Commission is designated to make the initial funding recommendation of AHTF. At its discretion, the City reserves the right to alter the membership and size of the committee. Scores of the evaluation committee members will be totaled to determine the top-rated projects.

Evaluation Criteria

Proposals will be assessed based on the following key elements:

- Responsiveness to RFP requirements
- Qualifications and past performance
- Project feasibility and readiness
- Budget and financial leverage
- Impact, equity, and alignment with AHTF priorities

Rating – Tier 1

No.	Rating Criteria	Point Values
1	Team Qualifications & Past Relevant Projects	20
2	Clarity, Logic, and Execution Strategy	20
3	Affordability Duration	10
4	Leverage	10
5	Investment Impact	15
6	Readiness & Feasibility	15
7	Resident Well-Being	10
4	Local Preference	3% or 6% of the total available points*

*See local preference requirements below

Rating – Tier 2

No.	Rating Criteria	Point Values
1	Program Alignment	20
2	Organizational Capacity	20
3	Outcomes & Measurability	15
4	Equity & Accessibility	15
5	Investment Impact	10
6	Readiness to Proceed	10
7	Use of Funds	10
4	Local Preference	3% or 6% of the total available points*

*See local preference requirements below

A. DESCRIPTION OF EVALUATION

To ensure that proposals are complete and address all key RFP issues, proposals should adhere to the following format. Proposals shall be organized into the following sections, in the order listed, and inclusive of all requested information:

- a) **Proposal Cover Page, Declaration, and Checklist:** Offerors will prepare and submit the Proposal Cover Page, Declaration, and Checklist (Attachment A).
- b) **Reference List.** Using Attachment E, Offerors should provide the name, title, company, contact information of at least 3 references. The references may be contacted to assess the Offerors past performance, reliability, and ability to meet contract requirements
- c) **Project Capability (PC) Submittal.** The Project Capability Submittal has two components: Scope/Level of Expertise Plan (SC/LE), and Investment Impact Metrics & Budget Summary. (See Attachments F, G1 and G2,).
- i. Purpose of PC Submittal
 - i. Assist City in prioritizing Offerors' submittals based on their scope, expertise, and ability to understand intent of this RFP and the resultant contract.
 - ii. Provide high performing offerors with the opportunity to differentiate themselves from their competitors due to their experience and expertise by using verifiable performance metrics and previous relative project performance results.
- ii. PC Submittal Format Requirements
 - i. A PC proposal template is included in this RFP. This document should be used by all offerors. Offerors should NOT re-create, re-format, or modify the template in any manner. Offerors should type their responses on the Word template provided.
 - ii. Failure to comply with any of the PC format requirements may result in disqualification.
 - iii. The PC submittal should not contain any marketing information. The submittal should be used to prove to the City that the offeror has expertise for the specific project being proposed on.
 - iv. References used in the PC submittal should be listed in the Attachment H Reference List. The Reference List will be used by CPD, the Evaluation Committee, and Procurement Manager after PC submittals are evaluated.
- iii. Overview of the Scope/Level of Expertise Plan - The Scope/Level of Expertise Plan is to allow Offerors to differentiate themselves based on their technical capabilities and understanding of the City's specific needs. It should summarize the narratives that show the Offeror can accomplish the subject project with the Scope defined by past experiences on similar projects. Offerors should identify scope claims based on their expertise and experience supported by their capability to this specific project environment and requirement.
- d) Completed & signed Campaign Contribution Disclosure Form (mandatory), completed and signed Conflict of Interest Form (desired) and completed and signed Non-Collusion Affidavit (desired).
- e) Local Preferences

Purpose:

The City recognizes the economic value of supporting local businesses. Local preferences are intended to enhance the competitiveness of local businesses in the procurement process, in alignment with the City's Procurement Manual and applicable ordinances. These preferences are applied to promote local economic growth while adhering to the governing laws and regulations.

Usage:

Local preferences are applied in the evaluation of proposals received in response to the City's RFPs. These preferences are granted to businesses that meet specific qualifications, as outlined below, and can only be applied to procurements funded by the City. They are not applicable to purchases using state, federal, or grant funds.

Application:**1. Local Preference Qualification**

- To qualify, an Offeror must attach a Resident Business certification issued by the New Mexico Taxation and Revenue Department to their proposal. This certificate must verify that the business is located within city municipal limits.
- Proposals without a valid certification will not be eligible for local preference consideration.

2. Evaluation in the Formal RFP Process

- **Point-Based System:**
 - Local resident businesses are awarded additional points equivalent to 3% of the total possible points.
 - Businesses with all local resident business subcontractors receive an additional 3% of the total possible points.
 - Maximum local preference: 6%.

3. Solicitations Above \$1,000,000

- Proposals from resident businesses are deemed 6% lower than their submitted bid, provided at least 50% of subcontracted services are performed by resident businesses.
- Proposals from non-local resident businesses are deemed 3% lower, provided at least 50% of subcontracted services are performed by resident businesses.

4. Restrictions

- Local preferences are not applicable when federal funds are part of the expenditure or anticipated to be used for the contract.
- If multiple preference certificates are submitted by a vendor, only one preference will be applied per solicitation, as determined by the City.

Additional Information: Applications for Resident Business certification can be downloaded at:
<http://www.tax.newmexico.gov/Businesses/in-state-veteran-preference-certification.aspx>.

B. PROJECT CONTROLS

Before the contract is awarded, an evaluation committee report should be completed and suggest award to the CDC's recommended offerors. If the justification is not sufficient, the award may go to the next best valued offerors who have met all the requirements. Selected proposal should be a proposal that is responsive, responsible, and is the most advantageous to City, as determined by the City in its sole discretion.

C. CLARIFICATION

Following the initial evaluation, the potential best value Offeror may be asked to enter into a Clarification Phase. This crucial phase, guided by Attachment H (Clarification Phase Guide), serves as a 'setting expectations' process to ensure mutual understanding between the City and the Offeror. It provides an opportunity for both parties to clarify any aspects of the proposal and RFP. The Offeror will conclude the Clarification Phase with a presentation at the Clarification Meeting, demonstrating a clear and aligned understanding of the project's requirements and expectations.

D. AWARD

The City will notify each offeror in writing of the City's decision.

- a) The City reserves the right to reject any or all proposals and to award more than one offeror and to a offeror other than the lowest-priced offeror. The City's decision to award contracts is final.
- b) The City at its sole discretion may decide to take no procurement action as a result of the RFP and/or may re-issue all or portions of the RFP.
- c) The City reserves the right to accept or reject without consideration proposals that do not address the full requirements of the RFP or that do not reach the designated address and contact before the proposal due date and time identified.

Final award is dependent upon the Offeror's Scope of Work (SOW) being acceptable to the City. Proposals and contents provided by the Offeror will be considered contractual obligations. Any new or unique requirements included in the proposal can be added or amended, at the City's sole option, to the final contract. Obligations of confidentiality will be an important condition of resulting contracts. The selected Offeror and all employees performing duties on this project will be required to keep all aspects of this project in confidence unless otherwise allowed by the City.

E. POST AWARD REQUIREMENTS FOR CONTRACTOR

Following the award of Affordable Housing Trust Fund (AHTF) funds, the Contractor is accountable to the City for all administrative responsibilities and must comply fully with AHTF program requirements. Responsibilities include, but are not limited to, the following:

1. Contractual Requirements

The Contractor will enter into a contract with the City. These contracts will reflect all necessary provisions of the AHTF program, including remedies and default clauses in the event of unsatisfactory performance. Additional contractual obligations include:

The Contractor must adhere to a reasonable performance schedule and meet performance benchmarks as established at the City's discretion.

a) Performance Schedule and Criteria

The Contractor must adhere to a reasonable performance schedule and meet performance benchmarks as established at the City's discretion.

b) Cost Reimbursement Contracts

All payments will be made on a **cost reimbursement** basis. Payment is contingent upon the City's receipt of properly certified and documented invoices for **actual and allowable expenditures** under the terms of the contract.

c) Rate at Which Costs Are Incurred

It is expected that expenditures will occur at a relatively consistent rate over the contract term. If the City determines that the Contractor is significantly underspending or overspending, it reserves the right to reduce the budget or implement other fiscal controls as needed.

d) Invoicing

Contractors may submit invoices **at least once per month**, unless the City provides **written approval** for a different schedule. Invoices must be submitted **within twenty (20) days** after the close of the month for which reimbursement is sought. Invoices shall be sent to the following e-mail addresses:

- rlcatanach@santafenm.gov
- rmgosende@santafenm.gov

Failure to do so may result in the **non-availability of funds**.

2. Record-Keeping, Reporting, Monitoring, and Performance Measurement

Contractors must collect and maintain all documentation demonstrating compliance with AHTF program requirements, including data on beneficiaries.

- **Quarterly Reporting:** Contractors must submit a quarterly report on program accomplishments.
- **City Oversight:** The City will conduct annual monitoring of AHTF-funded activities. This includes:
 - Reviewing performance based on the Scope of Work in the contract;
 - Examination of records;
 - May be subject to **In-Person Site Visits or Virtual site visits**.

ATTACHMENT A – PROPOSAL COVER PAGE, DECLARATION, AND CHECKLIST

The Offeror should complete and submit this Attachment. The following documents are required for this RFP (please mark off each document to acknowledge that you have completed and submitted the document in the proper format):

- | | | |
|--------------------------|--------------|---|
| <input type="checkbox"/> | Attachment A | Proposal Cover Page, Declaration, & Checklist |
| <input type="checkbox"/> | Attachment B | Campaign Contribution Disclosure Form |
| <input type="checkbox"/> | Attachment C | Conflict of Interest |

- ☐ Attachment D Non-collusion Affidavit
- ☐ Attachment E Reference List
- ☐ Attachment F Project Capability Submittal Checklist and Format
- ☐ Attachment G (1) Scope/Level of Expertise (LE) Plan
- ☐ Attachment G (2) Investment Impact Metrics & Budget Summary

RFP # 26006

Phone Number	Company Name
Mailing Address	FEIN
City and Country	NMBTIN (fka CRS)

2. Identify the individual(s) authorized by the organization to (A) contractually obligate, (B) negotiate, and/or (C) clarify/respond to queries on behalf of this Offeror:

	A Contractually Obligate	B Negotiate*	C Offeror Key Personnel Lead	D Clarify/Respond to Queries*
Name				
Title				
Email				
Telephone				

* If the individual identified in Column A also performs the functions identified in Columns B & C, then no response is required for those Columns. If separate individuals perform the functions in Columns B and/or C, they should be identified.

3. Use of subcontractors (Select one):

- _____ No subcontractors will be used in the performance of any resultant contract, OR
- _____ The following subcontractors will be used in the performance of any resultant contract:

(Attach extra sheets, as needed)

4. Describe any relationship with any entity (such as the City, State Agency, reseller, etc. that is not a subcontractor(s) listed in #3 above), if any, which will be used in the performance of any resultant contract. (N/A, None, Does not apply, etc. are acceptable responses to this item.)

(Attach extra sheets, as needed)

By signing the form below, the Authorized Signatory attests to the accuracy and veracity of the information provided on this form, and explicitly acknowledges the following:

- On behalf of the submitting-organization identified in item #1, above, I accept the Conditions Governing this RFP;

- I concur that submission of our proposal constitutes acceptance of the Evaluation Factors and Draft Contract contained in this RFP; and
 - I acknowledge receipt of all amendments to this RFP, if any.

_____, 20____
 Authorized Signature and Date (*Should be signed by the individual identified in item #2.A, above.*)

ATTACHMENT B - CAMPAIGN CONTRIBUTION DISCLOSURE FORM

Pursuant to NMSA 1978, Sections 13-1-28, and 13-1-191.1, a prospective contractor subject to this section shall disclose all campaign contributions given by the prospective contractor or a family member or representative of the prospective contractor to an applicable public official of the state or a local public body during the two years prior to the date on which a proposal is submitted or, in the case of a sole source or small purchase contract, the two years prior to the date on which the contractor signs the contract, if the aggregate total of contributions given by the prospective contractor or a family member or representative of the prospective contractor to the public official exceeds two hundred fifty dollars (\$250) over the two-year period. A prospective contractor submitting a disclosure statement pursuant to this section who has not contributed to an applicable public official, whose family members have not contributed to an applicable public official or whose representatives have not contributed to an applicable public official shall make a statement that no contribution was made.

A prospective contractor or a family member or representative of the prospective contractor shall not give a campaign contribution or other thing of value to an applicable public official or the applicable public official's employees during the pendency of the procurement process or during the pendency of negotiations for a sole source or small purchase contract.

Furthermore, a solicitation or proposed award for a proposed contract may be canceled pursuant to NMSA 1978, Section [13-1-181](#) or a contract that is executed may be ratified or terminated pursuant to NMSA 1978, Section [13-1-182](#) if a prospective contractor fails to submit a fully completed disclosure statement pursuant to this section; or a prospective contractor or family member or representative of the prospective contractor gives a campaign contribution or other thing of value to an applicable public official or the applicable public official's employees during the pendency of the procurement process.

The state agency or local public body that procures the services or items of tangible personal property shall indicate on the form the name or names of every applicable public official, if any, for which disclosure is required by a prospective contractor.

THIS FORM MUST BE INCLUDED IN THE RFP AND MUST BE SUBMITTED BY ANY OFFEROR WHETHER OR NOT THEY, THEIR FAMILY MEMBER, OR THEIR REPRESENTATIVE HAS MADE ANY CONTRIBUTIONS SUBJECT TO DISCLOSURE.

The following definitions apply:

“Applicable public official” means a person elected to an office or a person appointed to complete a term of an elected office, who has the authority to award or influence the award of the contract for which the prospective contractor is submitting a competitive sealed proposal or who has the authority to negotiate a sole source or small purchase contract that may be awarded without submission of a sealed competitive proposal.

“Campaign Contribution” means a gift, subscription, loan, advance or deposit of money. or other thing of value, including the estimated value of an in-kind contribution, that is made to or received by an applicable public official, or any person authorized to raise, collect, or expend contributions on that official's behalf for the purpose of electing the official to statewide or local office. “Campaign Contribution” includes the payment of a debt incurred in an election campaign but does not include the value of services provided without compensation or unreimbursed travel or other personal expenses of individuals who volunteer a portion or all of their time on behalf of a candidate or political committee, nor does it include the administrative or solicitation expenses of a political committee that are paid by an organization that sponsors the committee.

“Family member” means a spouse, father, mother, child, father-in-law, mother-in-law, daughter-in-law or son-in-law of (a) a prospective contractor, if the prospective contractor is a natural person; or (b) an owner of a prospective contractor.

“Pendency of the procurement process” means the time between the public notice of the RFP and ending with the award of the contract or the cancellation of the RFP.

“Prospective contractor” means a person or business that is subject to the competitive sealed proposal process set forth in NMSA 1978, Sections [13-1-28](#) through [13-1-199](#).

“Representative of a prospective contractor” means an officer or director of a corporation, a member or manager of a limited liability corporation, a partner of a partnership or a trustee of a trust of the prospective contractor.

Name(s) of Applicable Public Official(s) if any: _____

Alan Webber, Mayor
Councilor Signe I. Lindell, District 1, Pro Tem
Councilor Alma Castro, District 1
Councilor Carol Romero-Wirth, District 2
Councilor Michael Garcia, District 2
Councilor Lee Garcia, District 3
Councilor Pilar F.H. Faulkner, District 3
Councilor Amanda Chavez, District 4
Councilor Jamie Cassutt, District 4

DISCLOSURE OF CONTRIBUTIONS BY PROSPECTIVE CONTRACTOR:

Contribution Made By:	_____
Relation to Prospective Contractor:	_____
Date Contribution(s) Made:	_____ _____
Amount(s) of Contribution(s)	_____ _____
Nature of Contribution(s)	_____ _____
Purpose of Contribution(s)	_____ _____

(Attach extra pages if necessary)

--OR--

NO CONTRIBUTIONS IN THE AGGREGATE TOTAL OVER TWO HUNDRED FIFTY DOLLARS (\$250) WERE MADE to an applicable public official by me, a family member or representative.

ATTACHMENT C - CONFLICT OF INTEREST STATEMENT

Complete, sign, and return with your proposal.

The City policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of City contracts and Purchase Orders.

The Offeror shall comply with all applicable provisions of the Governmental Conduct Act, NMSA 1978, Section 10-16 et seq and include a full disclosure of all potential organization conflicts of interest in the Proposal.

In addition to the authorized representative, all key personnel shall also complete the Conflict-of-Interest Form below certifying that the entity has read and understands the City's policy regarding conflict of interest. Each key personnel must also certify that there is no conflict of interest in connection to this RFP and/or resultant contract. If there is a conflict with the Project, then the authorized representative and known key personnel needs to describe the conflict.

The Offeror agrees that, if after award, an organizational conflict of interest is discovered, the authorized representative makes an immediate and full written disclosure to the City that includes a description of the action taken to avoid or mitigate such conflicts. If an organizational conflict of interest is determined to exist, the City may, at its discretion, cancel the contract. If Offeror's personnel was aware of an organizational conflict of interest prior to the award of the contract and did not disclose the conflict to the City, the City may terminate the contract for default.

The City may disqualify an Offeror if any of its key personnel belong to more than one Submitter organization/firm.

I, _____, certify that I/We have no personal or financial interests and no present employment or activity which would be incompatible with this firm's participation in any activity related to the RFP or execution of the awarded as a result of this RFP. For the duration of this firm's involvement in the resultant contract, this firm agrees not to accept any gift, benefit, gratuity or consideration, or begin a personal or financial interest in a party who is proposing or associated with an or Offeror on the contract.

I certify that this firm will keep all procurement and contract information confidential and secure. This organization will not copy, give, or otherwise disclose such information to any other person unless the City has on file a confidentiality agreement signed by the other person, and the disclosure is authorized and necessary to the contract. I understand that if this firm leaves this agreement before it ends, this firm must keep all contract information confidential. I agree to follow any instructions provided by the City relating to the confidentiality of the contract information. I fully understand that any unauthorized disclosure made by this firm may be a basis for civil or criminal penalties. I agree to advise the CPO, via email, purchasing@santafenm.gov immediately in the event that I or another person within this organization either learn or have reason to believe that any person who has access to confidential information has or intends to disclose that information in violation of this agreement.

This statement must be fully completed and signed by an authorized representative.

Company Name: _____

Authorized Representative/Title: _____

Phone Number: _____

Fax Number: _____

Email Address: _____

Signature: _____

Date: _____

The above information is subject to verification by the City. If the City finds a misrepresentation, the proposal may be automatically disqualified from the procurement process or the contract may be canceled.

ATTACHMENT D - NON-COLLUSION AFFIDAVIT

Complete, sign, and return with your proposal.

I hereby affirm that: I am the _____ (insert title) and the duly authorized representative of _____ (insert organization's name) whose address is _____. And, that I possess the legal authority to make this affidavit on behalf of myself and the firm for which I am acting.

I affirm:

1. I am fully informed respecting the preparation and contents of the attached proposal and of all pertinent circumstances respecting such proposal.
2. Such proposal is genuine and is not a collusive or sham proposal.
3. Neither the said Offeror nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, has in any way colluded, conspired, connived or agreed, directly or indirectly with any Offeror, firm or person to submit a collusive or sham proposal in connection with the Contract for which the attached proposal has been submitted or to refrain from offering a proposal in connection with the Contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Offeror, firm or person to fix the price or prices in the attached proposal or of any other Offeror, or to fix any overhead, profit or cost element of the proposal or the offer price of any other Offeror, or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against the Mayor and Council of City of Santa Fe, New Mexico or any person interested in the proposed Contract; and
4. The price or prices quoted in the attached proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the Offeror or any of its agents, representatives, owners, employees, or parties in interest, including this affiant. I do solemnly declare and affirm under the penalties of perjury that the contents of this affidavit are true and correct.

Signature _____

Printed Name _____

Title _____

Date _____

ATTACHMENT E – REFERENCE LIST

The Offeror must provide at least three (3) references who can verify the narratives listed in section G(1): Scope/Level of Expertise.

	Name	Title	Company	Email	Phone Number
1					
2					
3					
4					
5					
6					
7					

ATTACHMENT F – PROJECT CAPABILITY SUBMITTAL COMPLIANCE AGREEMENT CHECKLIST AND FORMAT

The Offeror should complete and submit this checklist along with the Project Capability (PC) Submittal. Failing to answer or answering “No” to any of the questions below may result in disqualification.

1. Is your PC Submittal (attachments G1, & G2) completed as instructed? ☐ Yes ☐ No
2. Do you understand that you should use the PC Submittal templates provided in this RFP and that you are NOT allowed to re-create the PC Submittal Templates (cannot alter font size, add colors, add pictures, etc.) or handwrite your responses? ☐ Yes ☐ No
3. Do you understand that the contents of PC Submittal will become part of the Contract? ☐ Yes ☐ No
4. Do you understand that your Proposal may be disqualified if you fail to meet any of the above requirements or any of the Pass/Fail Criteria? ☐ Yes ☐ No

ATTACHMENT G (1) – SCOPE/LEVEL OF EXPERTISE PLAN (SC/LE)

Instructions:

Offeror shall identify which Tier (Tier 1 or Tier 2) they are applying for by checking the applicable box below:

Tier 1 ☐

Tier 2 ☐

Tier 1 Applicants

Provide a concise narrative addressing each bullet point below. Your responses should highlight your qualifications, relevant experience, and how your proposed project meets or exceeds the City's objectives. Emphasize any unique strengths or value your team brings and summarize the project to help the Evaluation Committee quickly understand your approach.

- **Team Qualifications & Relevant Projects** – Include past experience with similar housing development projects.
- **Clarity, Logic & Execution Strategy** – How you plan to carry out the project.
- **Affordability Duration** – Length of time affordability will be preserved.
- **Leverage** – Demonstrate a 3:1 or greater match of non-AHTF funds.
- **Investment Impact** – AHTF dollars per unit and total leverage ratio.
- **Readiness & Feasibility** – Timeline, permitting, zoning status, site control.
- **Resident Well-Being** – Projected outcomes related to health, safety, and housing stability.

Evaluation Criteria: Shows clear understanding of scope, goals, and target population. Timeline and budget are realistic. Offeror demonstrates compliance with all applicable laws and regulations (e.g., fair housing, labor standards).

Tier 2 Applicants

Provide a concise narrative addressing each bullet point below. Your responses should demonstrate programmatic capability, community impact, and how your proposal aligns with AHTF goals. Be sure to articulate measurable outcomes and organizational strengths.

- **Program Alignment** – How the program supports AHTF mission and goals.
- **Organizational Capacity** – Staff qualifications, systems, and past experience.
- **Outcomes & Measurability** – How success will be defined and tracked.
- **Equity & Accessibility** – Strategies for inclusion and cultural relevance.
- **Investment Impact** – AHTF dollars per household and total leverage.
- **Readiness to Proceed** – Timeline and feasibility of implementation.
- **Use of Funds** – Appropriateness and clarity of how funds will be spent.

Evaluation Criteria: Shows clear understanding of scope, goals, and population served. Timeline and budget are realistic. Offeror demonstrates compliance with regulations, including fair housing and wage laws.

ATTACHMENT G (2) – INVESTMENT IMPACT METRICS & BUDGET SUMMARY

Instructions: Complete the section below according to the Tier for which you are applying. All financial figures must be current at the time of submittal and should reflect total costs including overhead and profit.

1. Investment Impact Metrics

☐ **Tier 1 – Development & Preservation**

- **Number of housing units (new or rehabbed):** _____
- **AHTF dollars per unit (AHTF ÷ Units):** \$ _____

☐ **Tier 2 – Housing Support & Stability**

- **Number of households served:** _____
- **AHTF dollars per household (AHTF ÷ Households):** \$ _____

2. Requested AHTF Fund Uses

Please list the major cost categories for which AHTF funds will be used. Include estimated amounts for each.

Category	Brief Summary	Dollar Amount
Operating Costs	(e.g., indirect costs, insurance)	\$ _____
Administrative Costs	(e.g., salaries, contractors)	\$ _____
Construction Costs	(if applicable)	\$ _____
Equipment	(if applicable)	\$ _____

Total AHTF Request: \$ _____

Total Project/Program Budget: \$ _____

3. Other Funding Sources

Please list all other secured or pending funding sources that contribute to your total project/program budget.

Funding Source	Status (Secured/Pending)	Amount
-----------------------	---------------------------------	---------------

4. Matching Funds Requirement

Applicants must demonstrate a minimum 3:1 leverage ratio to be eligible.

Leverage Ratio Formula: (Total Project Budget – AHTF Request) ÷ AHTF Request

Calculated Leverage Ratio: _____

ATTACHMENT H – CLARIFICATION PHASE GUIDE

1. OVERVIEW

- a. Purpose: The Clarification Phase is designed to refine the selected Offeror's proposal and ensure a clear understanding of project requirements before contract execution. This phase is not a negotiation of cost/fee/financial rates, project durations, or project team composition, unless specifically requested by the City by following the BAFO process. The Clarification phase commences upon notification of the highest-ranked Offerors and concludes with the recommendation of awards, after all identified issues have been addressed and updates provided through BAFO. If the City determines, at any point during the Clarification Phase, including after the First Clarification Meeting and Clarification Summary Meetings, that the proposal does not adequately meet the City's needs based on the requirements set forth in this RFP, the City may proceed with a Clarification Phase with the next highest-ranked Offeror. Upon successful completion of the Clarification Phase and receipt of all required documentation, the City may proceed to contract award.
- b. Objective and Performance: The City's objective is to maximize the value and effectiveness of the products/services without increasing the Offeror's proposed price, while ensuring high customer satisfaction. The Offeror's performance will be evaluated based on these factors throughout the contract period.
- c. Responsibilities: The Offeror is responsible for demonstrating a comprehensive understanding of the project scope and clearly defining their deliverables. The Offeror is also responsible for identifying and mitigating project risks. The City is responsible for communicating any concerns or issues to the Offeror before contract execution.
- d. Deliverables: The Clarification Phase requires the Offeror to provide proposed deliverables, which may form the basis of the final contract.

2. PRE-PLANNING AND COORDINATION

- a. Supporting Documentation: The City may request supporting documentation to verify information provided in the Offeror's proposal prior to the Clarification Phase.

First Clarification Meeting: The Offeror is required to attend a First Clarification Meeting to present their proposal, address City concerns, and introduce project stakeholders. The Offeror shall:

- Ensure all relevant City stakeholders and participants are invited.
 - Present the detailed scope of services, including schedule, cost, and deliverables.
 - Clearly define the City's responsibilities.
 - Address questions and concerns from City stakeholders.
 - Document and address concerns, issues, and comments from City stakeholders.
 - Propose a schedule for finalizing the Clarification Phase and contract documents.
- b. Post-Meeting Activities: Upon successful completion of the First Clarification Meeting, the Offeror may be required to:
 - Conduct research and provide additional information as requested.
 - Identify all parties involved in project delivery.
 - Develop and document mitigation strategies for identified concerns and issues.

- Finalize the terms to be included in the contract, payment schedule, and scope of work.

3. FINAL CLARIFICATION

- Purpose and Format: The Final Clarification may be conducted as outlined in Section II.B.8.

ATTACHMENT I - DRAFT CONTRACT

The draft included in this Attachment represents the contract the City intends to use to make awards. The City reserves the right to modify (as necessary) the draft prior to or during the award process.

(Draft contract is attached as a separate document)

The City's contract with the selected contractor will follow the City's standard format and include the terms in the Draft Contract. The City reserves the right to negotiate additional provisions. The RFP and the awarded proposal will be incorporated into the final contract.

Exceptions to contract terms are discouraged and may lead to rejection if they are deemed conditional, deficient, or require significant revisions. If an Offeror proposes changes, they must provide a separate document called Contract Edits, cite the specific sections of the Draft Contract they wish to modify, provide alternative language, and justify the proposed changes. General references to the Offeror's terms or complete substitutions of the Draft Contract are not allowed and will result in disqualification.

Offerors must submit any proposed modifications with their proposal, clearly identifying the affected sections of the Draft Contract. If no changes are proposed before selection, the Offeror agrees to the contract terms as stated. Contract negotiations will only address terms proposed during the RFP process and will not allow further amendments to the proposal.