

CITY OF MADISON

REQUEST FOR PROPOSALS



RFP #: 12047-0-2023-AH

Title: Block 113 Mixed Use Development Project

City Agency: Economic Development

Due Date: Friday, July 14, 2023
2:00 PM CST

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1 NOTICE TO PROPOSERS

1.1 Summary

The City of Madison Economic Development Division (“City”) is soliciting Proposals from qualified vendors for Block 113 Mixed Use Development Project. Vendors submitting Proposals (“Proposers”) are required to read this Request for Proposals (“RFP”) in its entirety and follow the instructions contained herein.

1.2 Important Dates

Deliver Proposals no later than the due time and date indicated below. The City will reject late Proposals:

Issue Date: Wednesday, January 8, 2025
Pre-Submittal Info Meeting: February 7, 2025, 10 AM, Central Time
Questions Due Date: February 12, 2025
Answers Posted Date: February 24, 2025
Due Date: March 7, 2025, 2 PM Central Time

1.3 Format

The City of Madison is only accepting electronic submissions at this time.

Electronic proposals should be in PDF format.

Complete and return Forms A through E to City of Madison Purchasing Services by Friday, July 14, 2023 2:00 PM CST.

1.4 Labeling

All email correspondence must include RFP # 12047-0-2023-AH in the subject line.

1.5 Delivery of Proposals

Delivery of electronic copy to: via email to bids@cityofmadison.com

and

Terrell Nash at: tnash@cityofmadison.com

Proposals must be delivered as instructed. Deliveries to other City departments and/or locations may result in disqualification.

1.6 Appendix A: Standard Terms & Conditions

Proposers are responsible for reviewing Appendix A, the Standard Terms and Conditions, prior to submission of their Proposals. Appendix A applies to the submission of proposals and in the absence of a signed contract becomes part of the contract terms. Part I of Appendix A provides legal terms relevant only to the submission of proposals. Part II of Appendix A provides legal terms that would apply *only in the absence of a signed contract*.

1.7 Appendix B: Sample Contract for Purchase of Services

Proposers are responsible for reviewing Appendix B, Sample Contract, prior to submission of their Proposals. A contract in the form of Appendix B will serve as the basis of the contract resulting from this RFP. The resulting contract will control over any different legal terms in this RFP, Appendix A, the proposal, etc. **By submitting a proposal, Proposers affirm their willingness to enter into a contract**

containing the terms found in Appendix B. While the City strives to provide the most appropriate sample contract for this RFP, the City reserves the right to modify the sample form for any resulting contract. The City does not negotiate legal terms prior to award.

1.8 Affirmative Action Notice

If Contractor employs 15 or more employees and does aggregate annual business with the City of \$50,000 or more for the calendar year in which the PO and/or Contract is in effect, Contractor shall file, within thirty (30) days from the PO/Contract effective date and BEFORE RELEASE OF PAYMENT, an Affirmative Action Plan designed to ensure that the Contractor provides equal employment opportunity to all and takes affirmative action in its utilization of applicants and employees who are women, minorities and/or persons with disabilities. A sample affirmative action plan, Request for Exemption forms, and instructions are available at: www.cityofmadison.com/civil-rights/contract-compliance/vendors-suppliers/forms or by contacting a Contract Compliance Specialist at the City of Madison Affirmative Action Division at (608) 266-4910. Vendors must register for an account to complete the required forms online, here: <https://elam.cityofmadison.com/citizenaccess>

Contractor shall also allow maximum feasible opportunity to small business enterprises to compete for any subcontracts entered into pursuant to this PO/Contract.

Job postings: All contractors who employ 15 or more employees (regardless of the dollar amount of this contract or their annual aggregate business with the City) must notify the City of all external job openings at locations in Dane County, Wisconsin, and agree to interview candidates referred by the City or its designated organization. Job posting information is available at: <http://www.cityofmadison.com/civil-rights/programs/referrals-and-interviews-for-sustainable-employment-raise-program>. Instructions for contractors: <http://www.cityofmadison.com/civil-rights/documents/Job%20Posting%20Instructions.pdf>

The complete set of Affirmative Action requirements for this purchase can be found in **paragraph 20 of Appendix A – Standard Terms and Conditions** and in **section 13 of Appendix B – Sample Contract for Purchase of Services.**

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1.9 Multiple Proposals

Multiple Proposals from Proposers are permitted; however, each must fully conform to the requirements for submission. Proposers must sequentially label (e.g., Proposal #1, Proposal #2) and separately package each Proposal. Proposers may submit alternate pricing schemes without having to submit multiple Proposals.

1.10 City of Madison Contact Information

The City of Madison Economic Development is the procuring agency:

Terrell Nash
City of Madison Economic Development
tnash@cityofmadison.com

The City of Madison Purchasing Services administers the procurement function:

Andy Hargianto
Purchasing Services
City-County Bldg, Room 407
210 Martin Luther King, Jr. Blvd.
Madison, WI 53703-3346
FAX: (608) 266-5948
purchasing@cityofmadison.com

For questions regarding
Affirmative Action Plans
please contact:

Contract Compliance
Department of Civil Rights
City-County Bldg., Room 523
210 Martin Luther King, Jr. Blvd.
Madison, WI 53703
PH: (608) 266-4910
dcr@cityofmadison.com

The City employs spam filtering that occasionally blocks legitimate emails, holding them in ‘quarantine’ for four calendar days. The contacts listed in this RFP will acknowledge all emails received. Proposers not receiving acknowledgement within twenty-four hours shall follow-up via phone with specific information identifying the originating email address for message recovery.

1.11 Inquiries and Clarifications

Proposers are to raise any questions they have about the RFP document without delay. Direct all questions, *in writing*, to the Purchasing Services administrator listed in Section 1.10.

Proposers finding any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this RFP document shall immediately notify the Buyer and request clarification. In the event that it is necessary to provide additional clarification or revision to the RFP, the City will post addenda – see 1.12 below. Proposers are strongly encouraged to check for addenda regularly.

Proposals should be as responsive as possible to the provisions stated herein. Exceptions are not permitted. The City of Madison reserves the right to disqualify any and all bids that are non-responsive or that include exceptions.

1.12 Addenda

In the event that it is necessary to provide additional clarification or revision to the RFP, the City will post addenda to its Proposal Distribution websites, see 1.13 below. It is the Proposers responsibility to regularly monitor the websites for any such postings. Proposers must acknowledge the receipt of any addenda on Form B. Failure to retrieve addenda and include their provisions may result in disqualification.

1.13 Bid Distribution Networks

The City of Madison posts all Request for Proposals, addenda, tabulations, awards and related announcements on two distribution networks – VendorNet and DemandStar. The aforementioned documents are available **exclusively** from these websites. It is the Proposers responsibility to regularly monitor the bid distribution network for any such postings. Proposers failure to retrieve such addenda and incorporate their appropriate provisions in their response may result in disqualification. Both sites offer free registration to City Proposers.

State of Wisconsin
VendorNet System:

State of Wisconsin and local agencies bid network. Registration is free.
<http://vendornet.state.wi.us/vendornet>

DemandStar by Onvia:

National bid network – Free subscription is available to access Proposals from the City of Madison and other Wisconsin agencies, participating in the Wisconsin Association of Public Purchasers (WAPP). A fee is required if subscribing to multiple agencies that are not included in WAPP.

Bid Opportunities:

www.cityofmadison.com/finance/purchasing/bidDemandStar.cfm

Home Page:

www.demandstar.com

To Register: <https://www.demandstar.com/app/registration>

Please note when registering: Pick the **Wisconsin Association of Public Procurement (WAPP)** to select all current Wisconsin government agencies.

1.14 Local Vendor Preference

The City of Madison has adopted a local preference purchasing policy granting a scoring preference to local suppliers. Only suppliers registered as of the bid's due date will receive preference. Learn more and register at the City of Madison website: www.cityofmadison.com/business/localPurchasing.

1.15 Oral Presentations/Site Visits/Meetings

Proposers may be asked to attend meetings, make oral presentations, inspect City locations or make their facilities available for a site inspection as part of this RFP process. Such presentations, meetings or site visits will be at the Proposers expense.

1.16 Acceptance/Rejection of Proposals

The City reserves the right to accept or reject any or all proposals submitted, in whole or in part, and to waive any informalities or technicalities, which at the City's discretion is determined to be in the best interests of the City. Further, the City makes no representations that a contract will be awarded to any proposer responding to this request. The City expressly reserves the right to reject any and all proposals responding to this invitation without providing any reasons for such rejection.

The City reserves the right to postpone due dates and openings for its own convenience and to withdraw this solicitation at any time without notice.

1.17 Withdrawal of Proposals

Proposers may, without prejudice, withdraw Proposals submitted prior to the date and time specified for receipt of Proposals by requesting such withdrawal before the due time and date of the submission of Proposals. After the due date of submission of Proposals, no Proposals may be withdrawn for a period of 90 days or as otherwise specified or provided by law. Proposers may modify their Proposals at any time prior to opening of Proposals.

1.18 Non-Material and Material Variances

The City reserves the right to waive or permit cure of nonmaterial variances in the offer if, in the judgment of the City, it is in the City's best interest to do so. The determination of materiality is in the sole discretion of the City.

1.19 Public Records

Proposers are hereby notified that all information submitted in response to this RFP may be made available for public inspection according to the Public Records Law of the State of Wisconsin or other applicable public record laws. Information qualifying as a "trade secret"—defined in State of Wisconsin Statutes—may be held confidential.

Proposers shall seal separately and clearly identify all information they deem to be "trade secrets," as defined in the State of Wisconsin Statutes. Do not duplicate or co-mingle information, deemed confidential and sealed, elsewhere in your response.

S. 19.36(5)

(5) TRADE SECRETS. An authority may withhold access to any record or portion of a record containing information qualifying as a trade secret as defined in s. 134.90(1)(c).

s. 134.90(1)(c)

(c) "Trade secret" means information, including a formula, pattern, compilation, program, device, method, technique or process to which all of the following apply:

1. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.
2. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

The City cannot ensure that information will not be subject to release if a request is made under applicable public records laws. The City cannot consider the following confidential: a bid in its entirety, price information, or the entire contents of any resulting contract. The City will not provide advance notice to Proposers prior to release of any requested record.

To the extent permitted by such laws, it is the intention of the City to withhold the contents of Proposals from public view—until such times as competitive or bargaining reasons no longer require non-disclosure, in the City's opinion. At that time, all Proposals will be available for review in accordance with such laws.

1.20 Usage Reports

Annually, the successful Proposers shall furnish to City Purchasing usage reports summarizing the ordering history for each department/service during the previous calendar year. Each report, at a minimum, must include each and every item of service ordered during the period, its total quantities and dollars by item/service and in total. The City reserves the right to request usage reports at any time and request additional information, if required, when reviewing retroactive.

1.21 Partial Award

Unless otherwise noted, it will be assumed that Proposers will accept an order for all or part of the items/services priced.

1.22 Tax Exempt

The City of Madison as a municipality is exempt from payment of federal excise taxes (Registration Number 008-1020421147-08) and State of Wisconsin taxes per Wisconsin statute 77.54(9a). Federal Tax ID #39-6005507. A completed Wisconsin Department of Revenue Form S-211 (R.2-00) can be found on the City website. Our tax-exempt number is ES 42916.

1.23 Cooperative Purchasing

Bidders may choose to extend prices offered on bids to other municipalities. Under Wisconsin Statutes, a municipality is defined as a county; city; village; town; school district; board of school directors; sewer district; drainage district; vocational, technical and adult education district; or any other public or quasi-public corporation, officer, board or other body having the authority to award public contracts. This is known as "cooperative" or "piggyback" purchasing, a practice common amongst units of government. The City is not responsible for any contract resulting from a cooperative purchase using this RFB as a basis; they are made solely between the bidders and third-party unit of government.

1.24 Proposers Responsibility

Proposers shall examine this RFP and shall exercise their judgment as to the nature and scope of the work required. No plea of ignorance concerning conditions or difficulties that exist or may hereafter arise

in the execution of the work under the resulting contract, as a consequence of failure to make necessary examinations and investigations, shall be accepted as an excuse for any failure or omission on the part of the Proposers to fulfill the requirements of the resulting contract.

DESCRIPTION OF SERVICES/COMMODITIES

1.25 Overview

The City of Madison and Dane County are home to the Wisconsin State Capitol, University of Wisconsin - Madison, and the State's fastest growing region. Continually recognized by many national organizations for a wide variety of quality-of-life awards and rankings, the Madison region is a prime choice for businesses and employees alike. With growing diversity among its population, the Madison region fosters a culture of openness, dialogue and energy, and offers a vital and dynamic workforce, the result of an outstanding education system, a diverse economy and successful partnerships between the public and private sectors.

At the heart of the region is downtown Madison. It is unlike any other in the world. In his 1911 plan "Madison: A Model City", renowned city planner John Nolen said, "Madison is one of the most striking examples that could be selected in the United States of a city which should have a distinct individuality, marked by characteristics separating it from and many respects elevating it above other cities."

The Downtown serves as Madison's signature. It is the geographic, economic and civic heart of the community. When people think of Madison, images of the Downtown and its unique isthmus setting often drive their impressions. It is the place where the community comes together, especially for the many events it hosts and the abundant activities it provides.

Successful downtowns are comfortable, but at the same time exciting, fun, and places of continual discovery. Successful downtowns spend considerable resources planning for and working towards a desired future. This includes identifying and building on the things that work well, while recognizing and seizing new opportunities that will keep Downtown fresh and dynamic. Downtown Madison today is much different than the city John Nolen knew, but the natural features that provide the unique setting that so enamored Nolen continue to be the cornerstones influencing its evolution.

It is within this context that the City of Madison is pursuing an exciting new development opportunity that would be a mixed-use project containing the Block 113 Mixed-Use Project.

Block 113, located at 1 South Butler Street currently contains a surface parking lot. The City utilized Block 113 as a staging and storage area during the construction of the recently completed Bus Rapid Transit (BRT) System. The use of this City owned site during the BRT construction process was considered an "in-kind" contribution by the Federal Transit Administration (FTA) Joint Development Program that provided substantial funds for the construction and completion of the City's East / West BRT system.

Because Block 113 was considered an in-kind contribution towards the completion of the BRT system, the City is required to redevelop this site following FTA's Requirements. FTA Requirements are outlined later in this RFP.

The site is bounded by East Washington Ave, South Butler Street, South Hancock Street, and East Main Street, as shown in the map below.



1.26 Project Goals

The Block 113 Mixed-Use Project is an important opportunity to continue to add dense, high quality, tax-generating development for the benefit of the City, the overlying taxing jurisdictions, and the residents of the downtown and greater Madison area. The Block 113 Mixed-Use Project can provide additional transit users, additional housing units, increased transit usage, and additional amenities to downtown Madison.

The City has an opportunity to guide a project to contribute to the ongoing renaissance of the East Washington Avenue area, using Block 113 as a catalyst for new, tax-revenue producing housing development.

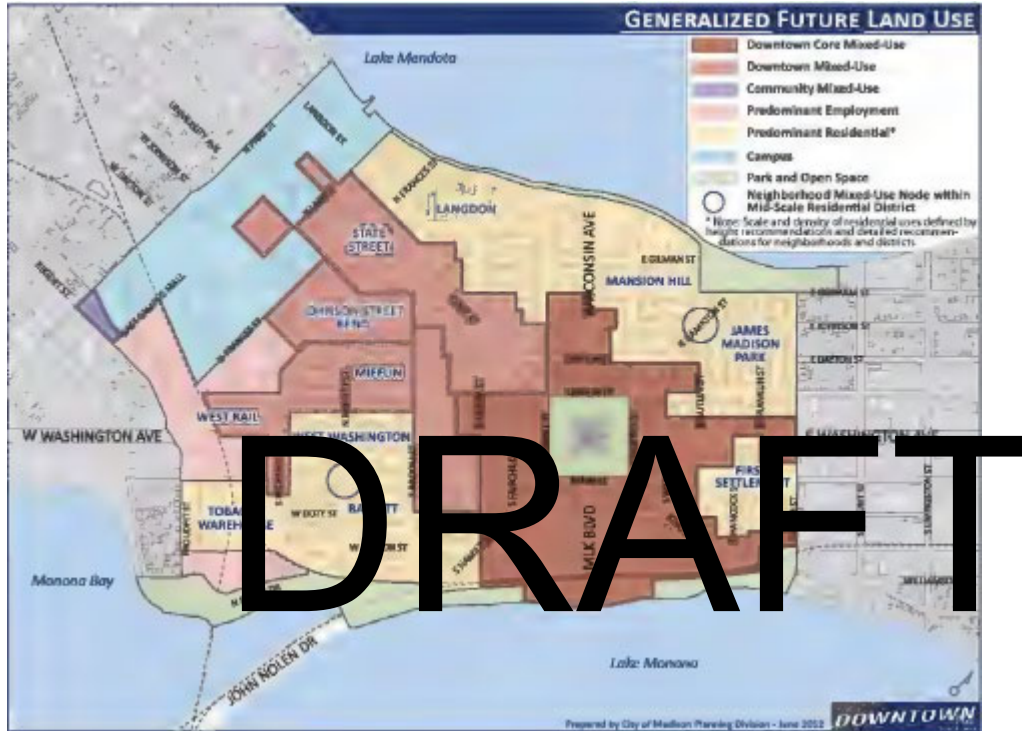


Figure 2

Please note the maximum building height on the site is ten (10) stories, as defined in the City of Madison [Zoning Ordinance](#). However, the City allows up to two (2) additional stories may be added if sufficient affordable units are created, as long as the building does not exceed the Capitol View Height Limit, as defined in Madison General Ordinance 28.071.

This opportunity to redevelop an existing surface parking lot into a project that produces transit supporting housing and jobs, taxable property, increased density is intended to:

1. Utilize City-owned, tax-exempt parcels to significantly expand the City's tax base by replacing an obsolete surface parking lot, continuing the activation of East Washington Avenue, increasing transit use, and enhancing Downtown Madison;
2. Unlock the development potential of the site through careful selection of mixed uses that include a mix of residential uses, retail, commercial office space, and potentially laboratory space;
3. Increase economic activity;
4. Increase the number of housing units (market rate/affordable /student) in the City.

The result of this effort will be a healthier downtown through increased property values, added employment and housing options, and increased transit use.

1.27 Project Scope and Specifications

The Project Goals, Scope, and Scoring Criteria Specifications are outlined below.

There are 8 sections outlined below that will be compared between proposers. These sections strike a balance between project requirements and project goals.

The project's approval is dependent upon its compliance with Federal Transit Authority (FTA) Joint Development requirements. Block 113 was utilized as part of the City's matching funds for the creation of the City's Metro Bus Rapid Transit system. Any redevelopment of the lot must meet FTA's Joint Development Requirements for redevelopment. Due to this requirement, Section 1 will be scored under a pass/fail system, and proposers that do not meet these requirements will not be scored in sections 2-8.

Sections 2-8 illustrate the City's goals for this project. Sustainability and Affordability are considered the City's highest priorities. Proposals should look to maximize Sustainability and Affordability within the FTA requirements.

- Section 1 - FTA Requirements and City Requirements (**pass/fail scoring**)
- Section 2 - Sustainability (0-25 points)
- Section 3 - Parking & Transportation (0-10 points)
- Section 4 - Affordability and unit mix (0-25 points)
- Section 5 - General Design (0-15 points)
- Section 6 - Development Team Experience and Capability (0-10 points)
- Section 7 - Racial Equity and Social Justice Initiative Goals (0-5 Points)
- Section 8 - Amount to City over \$1.1 Million per year (as described in section 1) (0-10 Points)

Section 1 = FTA Requirements and City Requirements (pass/fail scoring)

These "Pass / Fail" requirements for new development include:

- A. Any new development must be generally compliant with the Circular FTA C 7050.1C and approved by the FTA. (The City will assist the selected development through the approval process with the FTA)

- B. The City of Madison (and Madison Metro Transit) must maintain “satisfactory continuing control” to ensure that any development on Block 113 benefits transit over the lifespan of the development. This may take the form of:
 1. Long-term land lease
 2. Easement
 3. Deed restriction
 4. Other contractual requirement between the City and the Developer
- C. New development must incorporate private investment.
- D. Project must show that new development benefits transit by increasing transit demand to the area.
- E. Any change in existing parking facilities must produce an overall benefit for transit. There is a limit of no more than 270 off-street parking spaces throughout the entire block.
- F. New development must return a “fair share of revenue” to Madison Metro, the owner of Block 113. This “fair share of revenue” may be returned to the City through equal annual payments over fifteen (15) years, the value of which is greater than or equal to a net present value of \$9,000,000. This may be either through a “lease to own” arrangement, outright purchase, or a land contract.
- G. Project must abide by the City's Tenant Selection Plan and Affirmative Marketing Standards, including a 40-year LURA on any affordable units (those at 60% AMI or below). (See [Tenant Selection Plan](#))

Section 2 = Sustainability (0-25 points) – Project should illustrate its commitment to sustainability and will be scored using the following criteria:

- A. Commitment to Sustainable Building Certification (15 pts maximum)
 1. LEED Platinum, Passive House (Passive House), DOE Zero Energy Ready Home (ZERH), or Enterprise Green Communities Certification Plus (15 pts)
 2. LEED Gold, ENERGY STAR Multifamily New Construction, or Enterprise Green Communities Certification (6 pts);
 3. LEED Silver (3 pts);
 4. Below LEED Silver or no certification (0 pts);
- B. Energy sources (10 points maximum)
 1. All electric building (no natural gas service) (10 pts)
 2. Electric heating / cooling (geothermal and / or heat pumps), but some natural gas equipment, such as domestic hot water or others (5 pts);
 3. All electric appliances (3 pt)

Section 3 = Parking & Transportation (0-10 points)

- A. All proposals must have no more than 270 parking stalls. The following points may be added if applicable:
1. Parking ratio of less than 0.5 stalls / residential unit, with at least 6% equipped for EV charging (10 pts);
 2. Parking ratio between 0.51 – 0.7 or higher stalls / unit with at least 4% equipped for EV charging (5 pts);
 3. Greater than 0.7 stalls / unit OR fewer than 4% equipped for EV charging (0 pts)

Section 4 = Affordability and unit mix (0-25 points)

- A. Project delivers a mix of units at 30%, 50%, 60% Area Median Income (i.e. “Affordable”), and market rate income levels (worth up to 20 Points)
1. The percent of the total units that are Affordable will be the number of points, up to a max of 20 points)
- B. Project delivers a range of unit mixes (1 Bdr, 2 Bdr, 3 Bdr, 3+Bdr) (worth up to 5 points)

Section 5 = General Design Principles (0-15 points)

- A. The following guidelines should help shape a proposal that will add to the urban context of the site. Points will be distributed amongst the design principles. (see [Downtown Design Guidelines](#))
1. Architectural Expression of Materials
 2. Engaging Pedestrian Environment on all four street facing sides; Relationship to surrounding character with appropriate building setbacks (all four street faces)
 3. Project Massing & Shadow; Varied massing to allow increased ground level open space
 4. Architectural Expression to External Environment
 5. Universal Design (beyond ADA Accessibility requirements)
 6. High Quality Materials
 7. Consistency with Adopted Plans, Policies, Ordinances (As determined by Zoning and Planning Staff)
 8. Circulation and Design
 9. User-centered, Innovative Design & Community Outreach. Space for children to recreate both outdoors and indoors.
 10. Plan for tree preservation, new street trees, structural soil, and consistency with Complete Green Streets Policy.
 10. Curb management plan

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Section 6 = Development Team Experience and Capability (0-10 points)

- A. Identification of the development venture & team. Identify the legal name of the proposer & officers legally authorized to bind development venture to the development contracts.
- B. Identify key entities on the team, backgrounds & history. Include subcontractors (architect, engineering, financial partners).
- C. Identify key project team members & affiliates directly responsible for various aspects of the development. Note development manager for the team. (Provide contactable references from previous projects, particularly those similar in scope to the proposed development.)
- D. Describe the organizational structure for the team, their roles, reporting responsibilities & team interface with City project management.
- E. Demonstrate capability, experience in planning, designing & constructing mixed-use urban scale projects.
- F. Demonstrate your capability in managing completed mixed-use urban scale projects. (portfolio that includes descriptions, budgets, financial performance, and any challenges faced in previous projects)
- G. Disclose any potential conflict of interest due to any other clients, contracts or property interests.
- H. Disclose team's labor record, any alleged significant prior or ongoing contract failures, contract breaches, tax delinquencies, civil or criminal litigation including but not limited to

wage theft or investigation pending within the last five years which involves your firm and the key team members including general contractor and any sub-contractors identified above. List any contracts in which your firm and/or key team member has been found guilty or liable, or which may affect your performance. Describe any bankruptcy filing by your firm or key team member or an entity they controlled in the last ten years.

Section 7= Hiring and Workplace Culture and Partnerships Goals (0-5 Points)

- A. The following guidelines should help shape a proposal that will show how your proposal looks at the following goals through an equity lens. Points will be distributed amongst goals.
1. Hiring and Workplace Culture
 2. Hiring of sub-consultants
 3. Apprenticeship utilization
 4. Partnership with an emerging developer

Section 8 = Amount to City over \$1.1 Million per year (as described in section 1) (0-10 Points)

A. Net funds to City over \$1.1 Million per year (0-10 Points)

1. Please describe any amount of funds to City over \$1.1 Million per year (as described in section 1)
2. This amount should be a net amount after any City TIF/AHF requests.

Each project will be scored based upon the attached scoring metric in Form D.

1.28 Pre-Submittal Info Meeting

There will be an optional pre-submittal info meeting on Friday, February 7, 2025, at 10:00 AM. It is anticipated to be a virtual "Zoom" meeting. To receive a link, please email Terrell Nash, tnash@cityofmadison.com.

If the meeting is changed to an in-person meeting, an addendum will be released with all pertinent information.

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2 PROJECT REQUIREMENTS

Your response to the Block 113 Mixed-Use Project Request for Proposals must recognize and address the following program and project elements.

1. The RFP response shall propose redevelopment on 1 South Butler Street and may include adjacent parcels.
2. The project shall meet all the Federal Transit Authority (FTA) Joint Development requirements as described in Section 2.3 above.
3. The City has created tax incremental district (TID), aka TID 53, which may be available to provide assistance to a development that demonstrates a financial need. The City may consider financial assistance to a private development project that generates significant tax incremental value, if it demonstrates a financial gap to the City's satisfaction, the private financial assistance requested conforms to the City's TIF Policy, and that the net payment to the City conforms with the requirements of Section 2.3, sub-Section 1(F)(1) above. The City of Madison TIF Policy and Objectives and TIF Loan Underwriting Standards are available for your review: <https://www.cityofmadison.com/dpced/economicdevelopment/tax-incremental-financing/415/>

4. The City reserves the right to audit construction costs related to any public elements proposed in the project.
5. **The proposed must submit a table that includes the following components in a readable form so that it can be easily compared to other proposals:**
 - a. Number of Total Units in the project
 - b. # and % Units at Different AMI levels (30%,60%, 80%)
 - c. Proposal of Amount to City over required \$1.1 Million annually
 - d. \$ Total Amount of City financial request (i.e. AHF, TIF etc)
 - e. Net present value of financial payments to the City, net of any City financial assistance.
 - f. Sq Ft of non-residential uses, i.e. Commercial, institutional, etc
 - g. Total # of Parking Stalls and parking ratios
 - h. Number of EV parking stalls
 - i. Proposal's method of satisfactory continuing control (easement, lease, deed restriction, etc.)
 - j. Number of stories of building height as measured by the City zoning code
 - k. Any other pertinent data and information

3 REQUIRED INFORMATION AND CONTENT OF PROPOSALS

3.1 Required Forms

- 1) Form A – Signature Affidavit
- 2) Form B – Receipt Forms and Submittal Checklist
- 3) Form C – Vendor Profile
- 4) Form E – Resumes

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3.2 Section 2 – Development Venture and Team

Responses must be in the same sequence and identified with the corresponding question number (Example: Question 1, Question 2, etc.). Please limit responses to ten (10) pages. Resumes will not count towards the ten-page limit.

1. Identification of the development venture and team
 - a. Identify the legal name of the proposer and the officers who would be legally authorized to bind the development venture to the development contracts.
 - b. Identify the key entities comprising your team, describing briefly their respective backgrounds and history. This should include any subcontractors that the main developer will be using (architect, engineering, financial partners, etc).
 - c. Identify the key project team members (names and titles) and affiliates who would become directly responsible for the various aspects of the proposed development. Please note who the development manager is for your team. A principal or partner level individual shall be the contact provided for all issues related to the RFP. Provide resumes of all key team members to be involved in the project.
2. Describe the proposed organizational structure for the project team planning to undertake the Block 113 Mixed-Use Project, their roles, reporting responsibilities and team interface with City of Madison project management. Include a brief statement of the availability of key assigned personnel to the team.

3.3 Section 3 – Experience

Responses must be in the same sequence and identified with the corresponding question number (Example: Question 1, Question 2, etc.). Please limit responses to fifteen (15) pages.

1. Demonstrate your capability, experience in planning, designing and constructing mixed-use urban scale projects like the proposed Block 113 Mixed-Use Project. Include information for each land use element of the proposed project.
2. Demonstrate your capability in managing the completed mixed-use urban scale projects like the proposed Block 113 Mixed-Use Project.
3. Demonstrate your team's experience with public/private partnerships, should they be applicable to your proposal.
4. Disclose any alleged significant prior or ongoing contract failures, contract breaches, tax delinquencies, any civil or criminal litigation or investigation pending within the last five years which involves your firm and the key team members identified above. List any contracts in which your firm and/or key team member has been found guilty or liable, or which may affect your performance. Describe any bankruptcy filing by your firm or key team member or an entity they controlled in the last ten years.
5. Disclose any potential conflict of interest due to any other clients, contracts or property interests.

3.4 Section 4 – Project Concepts

Responses must be in the same sequence and identified with the corresponding question number (Example: Question 1, Question 2, etc.). Please limit responses to fifteen (15) pages.

1. Please provide a detailed project concept design and general outline specifications. This should include:
 - a. Conceptual site and landscape design plans sufficient to convey how the project will generally create an engaging pedestrian environment along all street frontages.
 - b. Preliminary architectural direction, including anticipated building massing, architectural expression, a shading study and typical building materials to convey the general style of the building and how it will relate to the surrounding buildings and positively contribute to the built urban character of the immediate area.
 - c. Green building practices to be used during the construction phase.
 - d. Preliminary floor plans for all floors sufficient to understand how the building's internal program is expressed on the exterior of the building; and
 - e. A count of total units, bedrooms, and type of use by SF (i.e. SF of commercial, office, etc.).
2. Provide a development phasing plan including a plan to maintain access to businesses in and around 1 South Butler Street during construction. Identify any constraints that the phasing of the Block 113 Mixed-use Project development may have on your financing capability or financing plan.

3.5 Section 5 – Financial Capability

Responses must be in the same sequence and identified with the corresponding question number (Example: Question 1, Question 2, etc.). Please limit responses to fifteen (15) pages. Spreadsheets of cash flows, financial estimates, and associated proformas will not count toward the fifteen (15) page limit.

1. Provide evidence that the development venture has the financial stability and capacity to undertake the development.
2. Provide a preliminary itemized estimate of the expected range of total project cost (hard and soft costs). To the extent possible, the development venture should also provide the financing

approach(es) it wishes to use and the preliminary roles it expects the public and private partners to have in developing the Block 113 Mixed-Use Project.

3. Market information and data that demonstrate the appropriateness of the assumptions made within the financial plan and operating pro forma outlined below.
4. A description of the terms of real estate acquisitions, phasing of such acquisitions, purchase price and planned ownership structure.
5. A workforce utilization plan and targeted business goals for the construction and operations periods.
6. A detailed preliminary public/private financial plan showing how the project is to be financed, including letters of interest or commitment from potential lenders/partners. The financing strategy should describe the following:
 - a. Estimated uses of capital providing at least this level of detail:
 - Land acquisition price to be paid (Either as a lump sum or a series of payments)
 - Estimated demolition/site prep
 - Hard costs for construction
 - Developer fee
 - Architectural and engineering expenses
 - Other soft costs
 - Other costs
 - b. Estimated sources of capital including:
 - Debt (private borrowing)
 - Debt (City or CDA borrowing)
 - Equity (cash or cash equivalent)
 - Equity (deferred forgiveness/developer/professional/construction fees)
 - Parking Utility contribution for publicly owned parking component
 - City Affordable Housing Funds contributed to the project
 - Estimate of Value Calculations, including cap rate assumptions
 - Estimate of Annual Property Tax Payments
 - Details of potential City financial assistance, including Tax Increment Finance, City of Madison Affordable Housing Funds (AHF) or others
 - Specify other special sources such as New Market Tax Credits, Section 42 Tax Credits, LIHTC, conduit bonding, etc.
 - c. Sources and uses should be further broken down by component (parking, retail, apartment, etc.) to the extent practicable.
 - d. Please review the City's TIF Policy and note any exceptions from policy the development team anticipates requesting. See:
 - <https://www.cityofmadison.com/dpced/economicdevelopment/tax-incremental-financing/415/>
 - e. Provide any available letters of interest, credit, or commitment from investors or lenders that demonstrate the financial strength of the team and financial feasibility of the project.
 - f. If utilizing New Market Tax Credits or other financial assistance programs, indicate team's experience with these financing methods.
 - g. Annual cash flows and pro-forma for term of project financing for a minimum of 10 years, by major component.
 - h. Net cash on cash returns.
 - i. Projected waterfall structures if equity partners are in the deal, including the use of tax credits of any type.
 - j. As Sustainability is a top priority for the city, provide a financial analysis of the costs and benefits associated with implementing sustainable building practices, including potential long-term savings and initial capital costs.

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- k. Provide audited financial statements for the past 3-5 years, bank reference letters, proof of financing with letter of intent from lenders or investors.
- l. Submit detailed pro forma that outlines expected costs and revenues over the life of the project (i.e., construction costs, revenue projections, operating expenses, profit margins).
- m. Provide a risk assessment that identifies potential financial risks (e.g., construction delays, cost overruns, market downturns) and the strategies the developer will implement to mitigate these risks.

3.6 Section 6 – Cost

Submit cost proposal, Form D, separate from the rest of the proposal.

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