

Proposal Response for:
**Gainesville, FL Zoning Review
& Inclusionary Study**
(RFP #DOSD-210014-GD)

January 14, 2021

Submitted by:
HR&A Advisors Inc.

Primary Contact:
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Partner
(646) 713-4886
abs@hraadvisors.com



Wildflower Apartments in Gainesville



January 14, 2021

Ms. Gayle Dykeman
Senior Buyer
City of Gainesville
City Hall
200 East University Avenue, Room 339
Gainesville, Florida 32601

Dear Ms. Dykeman:

On behalf of HR&A Advisors, Inc. (HR&A), I am pleased to submit this proposal in response to RFP #DOSD-210014-GD to support the City of Gainesville (the City) in identifying actionable policy recommendations to stem the impact of exclusionary policies and drive the creation of affordable housing in Gainesville. This study provides an opportunity to build on the City's momentum gathered through the comprehensive plan process and national momentum around equitable development to explore creative strategies for dismantling exclusionary zoning and housing policies, and putting in their place effective policies that drive toward greater equity.

As an industry-leading real estate, economic development, and public policy consulting firm, with extensive experience in affordable housing policy, and specifically in inclusionary zoning (IZ) policy development, HR&A is committed to helping our clients create effective policies that support equitable economic development. We commend the City of Gainesville for taking this step to pursue its equitable growth goals, and are well-positioned to support the City in this study.

Our team is familiar with the policy, land use, and real estate market context in Gainesville, and more broadly, with the political context in northern Florida. Our ongoing work on the City's Comprehensive Plan has provided an opportunity for us to delve deeply into the current demographic, economic, and development trends throughout the city, to understand the regulatory context that has shaped the city as it is today, and to hear City leadership's goals and concerns for future growth. HR&A has also worked in other markets throughout the region, from Jacksonville to Panama City, on diverse engagements ranging from master planning to economic recovery planning as cities face the COVID-19 pandemic. This experience gives us a strong foundation of knowledge about the regulations and political dynamics that might shape responses to an IZ policy, or other affordable housing policies, in Gainesville.

Our deep knowledge of housing policy and practice in Florida coupled with our ongoing involvement in developing a racial equity-driven comprehensive plan for Gainesville provide us with a strong understanding of how local planning processes and resulting policies and strategies support each other.

HR&A has extensive experience in markets across Florida and has developed an expert understanding of how housing policies affect feasibility. Our experience includes recent work for the Florida Apartment Association to understand the market for multifamily housing across the state and a current engagement specifically focused on the potential for tax incentives to support production of affordable housing. We have also worked on large-scale master plans and mixed-use redevelopments in Sarasota, Orlando, and Clearwater. Currently, HR&A is supporting the City in updating its Comprehensive Plan to ensure that decisions over the next decade work together to address racial disparity and reinvest in underserved communities – particularly in majority Black and low-income neighborhoods. As the project manager for Imagine Gainesville, we can bring to bear both our national and statewide experience in housing policy, and leverage the deep research and engagement we have done within the comprehensive planning process to ensure that our work supports City and community priorities and responds to community concerns.

We create affordable housing policies and implementation strategies that overcome barriers to affordability. We bring decades of experience analyzing housing markets and conducting feasibility studies for different development typologies in various urban contexts. We are involved with housing at the project implementation level, acting as real estate advisors on site-specific developments; at the program design level, helping local governments craft new policies and incentives; and at the regional needs-assessment level, evaluating housing markets within a wider geographic area. HR&A has led the development or evaluation of inclusive housing policies in over a half-dozen cities in the past two years and worked on similar local policy issues in dozens of other cities in the same period. On behalf of the City of New Orleans, an HR&A-led team analyzed the implications of an inclusionary housing policy and then developed a recommended requirement and corresponding administrative framework that was adopted by the City in February 2019 and enjoys wide support among advocates and developers. Additionally, for the City of Columbus Ohio, HR&A provided the market and development feasibility analysis that serves as the foundation for the City's new inclusionary housing proposal. Our extensive experience will help us to accurately assess housing needs in different Gainesville neighborhoods and recommend effective strategies to address them.

We are committed to thinking outside the box with residents and housing stakeholders to creatively leverage zoning, financial, and non-market-driven approaches to support community-driven development that avoids displacement. We work in markets and neighborhoods across the country, which gives us a broad understanding of the range of housing needs communities face, creative community-driven solutions that work, and anti-displacement strategies suitable to different contexts. From Atlanta, GA to New Orleans, LA, from Wake County, NC to Detroit, MI, we have worked with community members to identify and synthesize present and emerging housing issues, and we consider the broad universe of solutions available to address each issue based on each region's unique regulatory environment, history of investment in housing, and changes which make existing solutions even more successful. By analyzing and sharing a detailed understanding of market conditions, we build credibility and trust with local communities, and establish a common set of facts to guide the development of housing strategies that can effectively match affordability and anti-displacement requirements with available or potential new public resources, local assets, and community programs such as land trusts.

We are dedicated to supporting this work in Gainesville. Our Gainesville comprehensive plan team will be joined by additional leadership from HR&A's real estate advisory practice and supported by analytical staff to execute this work. Additional information on our proposed scope of services, relevant experience, and key team members is included in this proposal.

We appreciate the opportunity to submit this proposal for this interesting assignment. Should you have any questions on our proposal or wish to discuss, please do not hesitate to contact me at (646) 713-4886 or at: abs@hraadvisors.com.

Sincerely,



Andrea Batista Schlesinger
Partner
HR&A Advisors, Inc.

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TECHNICAL PROPOSAL

Scope of Services

To execute this study, HR&A will conduct an analysis that addresses the existing regulatory context, differences across Gainesville neighborhoods, and the appropriate mix of incentives and requirements to motivate development, and subsequently develop recommendations for a market-appropriate policy (or policies). This work includes three main phases, described in further detail below (Tasks 2 through 6), preceded by an initial task in which we will define and refine the City's affordable housing policy goals. In summary, we will:

- Review current land development code and zoning to identify existing exclusionary policies that may need to be revised or dismantled to foster affordable and mixed-income housing development.
- Drafting a series of policy briefs that explore a range of policies to achieve affordable housing goals. These papers are intended to support City leaders' ideation, discussion, and decision-making as they move toward adoption of the Comprehensive Plan and new policies outside of that planning process.
- Determine the feasibility of an IZ policy, in terms of its financial feasibility based on current market conditions, ability to meet State regulatory constraints, alignment with the City's policy goals and desire to produce equitable developments and development patterns, and then produce a roadmap for decision-making and implementation.

Task 1 | Kickoff & Identification of Affordable Housing Goals

Task 1.1: Kickoff

During a kickoff with the City of Gainesville (City) team, we will:

- Confirm the objectives and scope of work for this study and identify any internal or external milestones or deadlines that may impact the timing of this work.
- Define key questions that will guide our work and policy recommendations. We anticipate that these questions will focus on stemming the loss of affordable housing in Gainesville, stopping or reversing inequitable development patterns, and establishing policies that generate equitable housing outcomes, potentially amongst others.
- Discuss any requests for data or documentation that arise during review of existing information (as described in Task 1.2).
- Discuss the availability of the City's land use attorney and planning staff to assist in HR&A's work, particularly related to identifying key documents, confirming understanding of code and zoning text, and, if needed, in developing simple massing diagrams as described in Task 2.

Task 1.2: Data and Document Review

The HR&A team will review relevant existing materials, making use of our team's existing knowledge of and access to documents such as the draft Housing Action Plan, Local Housing Assistance Plan 2017 - 2020, 2019 Incentives and Recommendations Report, and the 2018-2022 Consolidated Plan. If additional documents are needed or of interest, we will request these during the kickoff discussion.

We will review all background materials over the course of approximately two weeks, as we hold kickoff discussions and begin our work.

Task 1 Deliverables:

- Agenda(s) to facilitate kickoff discussions.

- A brief memorandum summarizing the refined key questions we seek to answer during this engagement and how these will help advance the City's affordable housing goals. This document will serve as a final work plan and roadmap for the study going forward.

Task 2 | Existing Exclusionary Policies Review

We know from our current work with the City that current land development code, zoning policies, and recent market activity have reinforced racial segregation and strained housing affordability in Gainesville. In Task 2, the HR&A team will identify specific policies within the land development code, and specifically, the zoning section of the code, that:

- Deter the creation of affordable housing or limit the capacity for affordable housing development throughout Gainesville,
- Reinforce racial segregation in neighborhoods, housing typologies, and other factors,
- Create racial disparities in access to basic services, neighborhood amenities, and economic opportunity, as well as in opportunities to build wealth.

The HR&A team will catalog these policies and analyze how they are applied across the city at the neighborhood scale and how they impact individual lots or developments. We will document the policies and their effects in a graphic summary, including mapping and potentially demonstrating the impact of exclusionary policies on hypothetical lots or developments. Once identified and mapped, we will utilize supporting analysis around the existing housing stock, recent real estate market trends, development trends, and socioeconomic trends to illustrate how and where these policies are reinforcing inequity in Gainesville's housing market. This clear illustration of impacts will support, confirm, or help to refine City leadership's understanding of housing challenges in Gainesville, support our team's determination of the policies and programs that may be effective in halting or reversing these dynamics, and prioritize policies for further study.

We anticipate coordinating closely with the City's land use counsel and planning team in this work. While HR&A will produce maps and figures to produce this work, we do not prepare building-level sketches or massings, and assume that we may work closely with the City's planning team to produce such illustrations if needed. If the City team does not anticipate supporting this work, HR&A can identify a planning or design partner to support this task. The fee for these services is not included in the current budget proposal for this scope.

Task 2 Deliverables:

As described above, the findings from this review will help to establish the need for a change in affordable housing policy and inform our assessment of the tools available to help realize the City's affordable housing goals. HR&A will provide one draft and one final version of a briefing book containing a graphic summary presentation for City leadership and technical appendices detailing our work.

Task 3 | Policy Brief Development

HR&A will develop a series of policy briefs to convey the Department of Sustainable Development's recommendations for affordable housing policy to City leadership. These briefs will identify the specific links between housing challenges in Gainesville and the policies and/or programs that can most effectively address these challenges. This task is intended to respond directly to the questions developed in our kickoff, and ideally, the findings of our existing code and policy review in Task 2.

Task 3.1: Potential Policy Universe

HR&A will develop a “long list” of the policies and programs for consideration in Gainesville. We will develop this list in partnership with the Department of Sustainable Development team and based on best practices and innovative affordable housing tools from across the country that specifically respond to the challenges facing Gainesville, which may include housing affordability, instability and displacement, racial segregation, and others.

Topics may include innovative financing tools for affordable housing, including Tax Increment Local Transfer (TILT), exploring new and innovative homeownership models, land ownership and stewardship models, and others. We will provide a brief description of each potential policy or program and indicate whether and how policies can be deployed individually or in combination with other policy options to maximize effectiveness against Gainesville’s specific challenges.

The HR&A team will present the range of options to the client in a discussion of the opportunities and limitations of each and prioritize a shortlist (we anticipate two to three, with budget defined by the number of briefs selected, per our fee proposal) of topics for a policy brief or series of briefs.

Task 3.2: Policy Brief Development & Drafting

Based on the topics selected in Task 3.1, HR&A will draft the policy briefs. This will include performing research on the selected topic, outlining brief content, producing a first draft for comment, writing subsequent drafts, and collaborating on edits with the client to prepare briefs to be shared with City leadership.

Task 3.3: Presentation Support

HR&A will support distribution of the policy briefs to City leadership and participate in discussions around these topics along with the client, including preparing overview presentations. For each policy brief, we will prepare one brief presentation and provide a draft for comments and then a final draft. If briefs will be shared with leadership together, we will provide a single presentation combining our findings.

Task 4 | Inclusionary Housing Policy Feasibility Study

The HR&A team understands that an inclusionary housing policy is of interest to City leadership, but also that this is a complex tool to deploy in Florida due to HB 7103. In this task, HR&A will determine the financial feasibility of an inclusionary zoning (IZ) policy and assess the alignment of such a policy with Gainesville’s affordable housing and equitable economic development goals.

Task 4.1: Best Practices & State and Local Policy Review

Building on our knowledge of IZ best practices gained through past work with the National Multifamily Housing Council (NMHC) and cities across the country, HR&A will review best practices and comparable policy structures and requirements that exist elsewhere. Our review will include a summary and analysis of policies in other Florida jurisdictions, if identified, as well as national precedents in other regions. We will also work with City staff to flag specific legal issues as it relates to the implementation of IZ in the State of Florida and within Gainesville, including the constraints of HB 7103 and ways other jurisdictions have complied with these while implementing IZ or similar policies. We will also use this task to identify the goals of precedent IZ policies and review alignment of these goals with Gainesville’s.

Task 4.2: Market Scan

To inform assumptions and inputs for financial feasibility analysis, HR&A will conduct a market scan to understand the core real estate dynamics at play for multifamily rental units throughout Gainesville. Our analysis will utilize resources including third party databases such as CoStar, Reis, and ESRI Business Analyst and phone or web conference interviews with residential developers, other real estate professionals, housing advocates, and service providers working in the Gainesville market. Through this work, we will conduct the following data points and gather interviewee perspectives on the feasibility of implementing an IZ policy.

- Development costs, including land costs, hard costs for construction (inclusive of labor and materials), and other predevelopment costs such as soft costs and financing costs.
- Notable recent residential development projects.
- Total new residential units, categorized by product type and affordability status.
- Geographic differences within the city of in development delivery and product type.
- Residential market rents and pricing across the city.
- Absorption and occupancy characteristics.

In addition, HR&A will evaluate the range of other incentives that may be employed as part of multifamily development. We will confirm with the City the set of incentives to be studied.

Task 4.3: Financial Feasibility Analysis

Because HB 7103 requires local governments requiring affordable housing to do so at no cost to a developer, understanding the economics of residential development, and how those economics are impacted by a potential IZ policy, will be essential for Gainesville. HR&A will develop scenarios representative of development across different neighborhoods and housing types and test the feasibility of these developments under current market conditions, under a potential inclusionary requirement, and, if needed, with the support of additional incentives that may be available to offset the financial impact of an inclusionary policy.

We will begin by identifying submarkets or neighborhoods for testing based on varied economic conditions and housing types across the city. Based on our market scan and in coordination with the client, we will identify submarkets or neighborhoods for testing as part of this analysis. HR&A recognizes the different market conditions between South and East Gainesville, West Gainesville, and North Gainesville which are as much a function of social and cultural conventions as they are political demarcations. We will work closely with the client to confirm the submarket study areas and ensure each is appropriately representative of their defined market type.

The HR&A team will also identify building and property types for study based on the various development scenarios that can occur within each market type, including building type (low, mid, and high-rise and number of units), property type (new construction vs. rehab), and tenure (rental vs. for-sale). In coordination with the City team, we will determine which of these variables is important for review in Gainesville.

For the selected variables and submarkets, HR&A will create up to three development scenarios reflective of current market conditions and representative of the existing market for development. There are some product types that are unlikely to be appropriate in particular markets (e.g., high-rise development is unlikely to occur in a soft market). HR&A will assess the contextual appropriateness for each scenario to ensure it reflects the local market.

For each of the scenarios defined in the tasks above, HR&A will assess the feasibility of market rate development and the impact of an inclusionary housing requirement on development economics through the creation of a dynamic financial model structured for the Gainesville market. We will determine threshold rates of return that a housing developer would typically require and will project rents, vacancies, operating expenses, sales prices, cap rates, and market value for the prototypical development based on capitalized net operating income for the rental units. If a funding gap exists or is widened because of meeting an inclusionary requirement, HR&A will assess the potential impacts of utilizing incentives to fill this gap and comply with the requirements of HB 7103.

We will also analyze the potential to create an in-lieu fee option, which can provide funding to support affordable housing that is not being developed by the market, including larger family-size housing units,

supportive housing, or housing in locations where market-rate development is not currently occurring. We will discuss the potential to include such a mechanism with the City’s counsel, to understand how and if this element of an IZ policy could align with the State’s requirement to make developers “whole” for the financial impacts of such a policy. If an in-lieu fee is feasible, HR&A will develop a formula for determining an in-lieu fee that can be paid to meet affordability requirements. The in-lieu fee formula will be based on both project size (and the corresponding number of affordable units) as well as the financial impact, and account for a means of indexing the fee to allow for regular increases with the market and periodic resets over time that ensure the fee is set to an appropriate level and can adapt to changing market conditions.

We will evaluate the results of this analysis based on both potential to develop and enact an IZ policy and whether such a policy, given State requirements, will achieve the City’s goals for more equitable housing development, including how such a policy might affect overall development activity, alter or maintain existing market pressures, and serve the populations who have been the target of inequitable, exclusionary policies..

Task 5 | Affordable Housing Policy Recommendations

Task 5.1: Preliminary Recommendations on Mandatory IZ Requirement

If the City prioritizes development of an inclusionary zoning policy, the HR&A team will produce recommendations for a mandatory IZ requirement in Gainesville. In balancing affordability requirements with incentives, there may be a range of potential IZ policy options in terms of Area Median Income thresholds, share of affordable units, incentives offered, location of units, etc. HR&A will develop a feasible policy for consideration in Gainesville that balances various policy priorities (for instance, number of units produced vs. level of affordability that best aligns with income levels of residents most affected by inequitable policies). The recommended policy will be focused on:

- Actively reversing exclusionary development patterns and generating affordable housing that counteracts inequitable outcomes.
- Accounting for locational differences in Gainesville (i.e. neighborhood/market strength, zoning) that may affect outcomes in addition to housing, such as access to services, economic opportunities, etc.
- Accounting for varied market conditions throughout the city (i.e. building types, project size, rent levels, etc.).

During discussions about this recommendation with the client, we will explore tradeoffs around balancing the priorities above to develop the policy recommendation that is best aligned with City leadership’s goals.

If, based on internal discussions or other work in this scope, the City elects to pursue a different high-priority policy, HR&A would shift the focus of this task (and all subtasks) to that policy.

Task 5.2: Policy Implications

HR&A recognizes that establishing any inclusionary housing requirement in Gainesville may require changes to local policies and regulations that allow the policy to be put in place. In addition to the IZ policy itself, required policy changes may include adjustments to existing incentive programs, building code, or zoning regulations, among others. New policies may also be required for the creation of new programs or offices related to oversight of the IZ policy. As HR&A develops recommendations for an IZ policy, we will identify these changes as well.

Task 5.3 Final IZ Policy Recommendations

HR&A will work closely with the City to develop a final recommendation for an IZ policy, including all relevant aspects of a policy, which may include but are not limited to: affordability thresholds, share of affordable units, location of units (on-site vs. off-site), in-lieu fee, minimum unit thresholds, and potential differences in requirements by building typology or location.

Task 5 Deliverables:

The final recommendation will summarize (in a briefing book) the key aspects of the proposed policy to discuss with partner departments and members of City leadership to gather feedback and build consensus before moving to implementation. HR&A will provide one draft and one final version of the briefing book, including a summary section and detailed technical appendices.

Task 6 | Implementation Plan

To ensure that the recommended policy is positioned for success in Gainesville, HR&A will assess the City's current structure and processes associated with development permitting and approvals, incentives allocation, and compliance tracking, and will consider how an inclusionary requirement (or alternative affordable housing policy) would impact these administrative elements.

Based on existing processes in place in Gainesville and recognized national best practices, we will develop a plan for implementing the new policy. This plan will include guidance on items such as: rules for specific processes, such as tenant selection, income certification, and other requirements; administrative process requirements across departments; resource allocation across departments; and appropriate administrative structure.

HR&A will support City staff's development of policy language around this plan. However, we will not be responsible for drafting proposed ordinance language. Should the city require outside capacity to draft language, HR&A can work with the City to identify potential partner firms that can support in this task.

At the conclusion of this work, HR&A will create a draft report that summarizing all findings from our policy analysis into a clear set of policy recommendations and an implementation plan.

The final report will incorporate an executive summary highlighting the feasibility of an inclusionary policy in Gainesville and recommendations for the incentives and affordability requirements that Gainesville should adopt as part of an inclusionary housing policy. This summary will be the basis for a brief presentation to provide an overview of the report, including our financial analysis and recommendations, to senior City leaders to drive toward decision-making around the policy's implementation.

The report will also include technical appendices with detailed background and supporting information summarizing HR&A's market typology assessment, the development feasibility of each market, the impact of an inclusionary requirement on development feasibility, the ability of incentives to respond to Gainesville inclusionary housing needs by meeting the financing gap created by an inclusionary policy, required legislation to implement the recommended inclusionary policy, and a framework for implementation of the policy. These appendices will serve as references and a roadmap for City staff moving forward.

Tasks 6 Deliverables:

- A summary presentation that provides an overview of the report and our final recommendations for the City project team and to be shared with the City Manager and City leadership to support decision-making about the policy.
- A final report (in written or briefing book format) detailing findings and recommendations as described above for City staff reference and use.
- HR&A will submit one draft of this deliverable for review and comment and incorporate one round of revisions before finalizing and will be available for up to two presentations to senior leadership at the conclusion of these tasks.

Schedule

HR&A will work with the City to confirm an overall schedule for this work based on your preferred order of tasks and any important milestone dates or deadlines to be considered. We have provided an approximate timeframe below for each task within this study.

- Task 1 Kickoff & Identification of Affordable Housing Goals: 2 weeks
- Task 2 Existing Exclusionary Policies Review: 4 weeks
- Task 3 Policy Brief Development & Support: 4-6 weeks
- Task 4 Inclusionary Housing Policy Feasibility Study: 6 weeks
- Task 5 Affordable Housing Policy Recommendations: 3-4 weeks
- Task 6 Implementation Plan: 3-4 weeks

PRICE PROPOSAL

PART 3 – PRICE PROPOSAL


Proposer Company Name: HR&A Advisors, Inc.

Proposers are required to submit three (3) components in the pricing proposal:

- 1) Lump Sum price for the entire project – all-inclusive of travel, administrative costs and other expenses.
- 2) Provide a breakdown of the lump sum by task.
- 3) Detail hourly rate of each of the positions within Proposer’s company that will be participating in the development of the work product.
- 4) Price will be evaluated at 10% of the total evaluation points awarded.
- 5) **NOTE:** The City of Gainesville will approve coach air travel only. The City will pay only for the cost of administrative fees, i.e. copies, long distance phone calls, etc. Evidence of these expenditures will be submitted when invoicing the City.

Submitted by:

Andrea Batista Schlesinger
Name (printed)


Signature

1/13/2021
Date

Partner
Title

Price Proposal

The table below includes a breakdown of fees associated with each task described in the Scope of Services. Tasks 2 through 4 can be undertaken in the order most advantageous to the City team, and Task 5 and 6 should be responsive to the findings of all tasks performed before. Fees assume that all meetings are conducted remotely based on public health conditions and so do not include expenses that would typically be associated with travel or production of materials for in-person meetings.

Proposed Budget by Workstream and Task

Task	Total Fee
Task 1: Kickoff & Definition of Affordable Housing Goals	\$5,000
Task 2: Existing Exclusionary Policies Review	\$20,000
Task 3: Policy Brief Development (fee shown for two briefs)	\$45,000
Task 4: Inclusionary Housing Policy Feasibility Study	\$80,000
Task 5: Affordable Housing Policy Recommendations	\$30,000
Task 6: Implementation Plan	\$20,000
Total (Assumes three policy briefs)	\$200,000

Hourly Rates

Personnel	Hourly Rate
Chair / Vice Chair	\$535
Senior Advisor	\$430 - \$535
Partner (Andrea Batista Schlesinger)	\$430
Principal (Olivia Moss)	\$380
Director (Lydia Gaby)	\$325
Senior Analyst	\$240
Analyst	\$190
Research Analyst	\$150
Admin	\$100

Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. HR&A ADVISORS, INC.	
2 Business name/disregarded entity name, if different from above	
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input checked="" type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ▶ _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
5 Address (number, street, and apt. or suite no.) See instructions. 99 HUDSON STREET, 3RD FLOOR	Requester's name and address (optional)
6 City, state, and ZIP code NEW YORK, NY 10013	
7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number											
or											
Employer identification number											
2	0	-	8	7	6	7	6	8	1		

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶	Date ▶ 11/04/2020
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

QUALIFICATIONS

Qualifications

HR&A offers to provide services under all of the below Expertise Areas listed in the RFP:

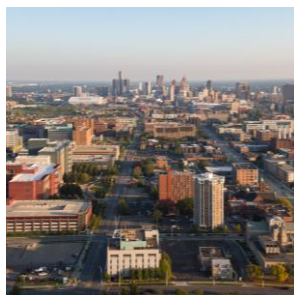
- Exclusionary Zoning & Land Use Policy Review
- Inclusionary Housing Feasibility & Policy Analysis
- Affordable Housing Policy Analysis & Recommendations
- Equitable Development Strategy

HR&A has extensive experience providing these services to a wide range of public-sector clients through both on-call and specific engagements, as noted in the project experience detailed in the following pages and in the following table.

Client	Location	Exclusionary Zoning & Land Use Policy Review	Inclusionary Housing Feasibility & Policy Analysis	Affordable Housing Policy Analysis & Recommendations	Equitable Development Strategy
City of Detroit Housing and Revitalization Department	Detroit, MI		X	X	
Wake County	Wake County, NC	X		X	
City of New Orleans	New Orleans, LA		X	X	
Buckhead Community Improvement District & Livable Buckhead	Buckhead, GA	X		X	
Up for Growth National Coalition	Various		X		
Trinity Park Conservancy	Dallas, TX				X
Economic Development Corporation of Kansas City	Kansas City, MO				X
Memphis Riverfront Development Corporation	Memphis, TN				X
Indianapolis Chamber of Commerce	Indianapolis, IN				X
Heinz Endowments	Pittsburgh, PA				X
City of Gainesville	Gainesville, FL				X
Florida Apartment Association	Florida	X		X	
City of Panama City	Panama City, FL			X	X
City of Clearwater	Clearwater, FL	X			
Jacksonville Downtown Investment Authority	Jacksonville, FL	X			

Relevant Project Experience

AFFORDABLE HOUSING POLICY & STRATEGIES



Inclusionary Housing Plan and Market Study for Detroit, Detroit, MI

On behalf of the City of Detroit's Housing and Revitalization Department, HR&A led a team including Grounded Solutions Network and Capital Impact Partners to study the multifamily market in Detroit, analyze the implications of a proposed inclusionary housing policy on local development feasibility, and research and recommend a set of targeted affordable housing policies. HR&A began by conducting an inclusionary housing feasibility study, which included a detailed citywide market study, residential demand analysis, and financial feasibility analysis for market rate housing and affordable housing utilizing various forms of subsidy and at varied levels of affordability. The team then conducted detailed market studies for specific neighborhoods within Detroit and tested the feasibility of an inclusionary housing policy on these areas based on current market conditions. Based on the findings of this analysis, HR&A communicated key implications around an inclusionary housing policy to HRD and worked with team members to provide case studies and additional or alternative policies for consideration. Based on HRD's goals and priorities, the team researched affordable housing policy best practices for comparable markets and analyzed and recommended potential strategies for Detroit, including an affordable housing trust fund, affordable housing preservation, leveraging of public land, and property tax reform. The team consolidated findings into a set of policy recommendations for affordable housing development in Detroit that laid the groundwork for the development of an affordable housing plan and can guide City policy.



Wake County Long-Term Affordable Housing Plan

On behalf of Wake County, HR&A led a team to develop a long-term Affordable Housing Plan that sets the vision for the County's investments in affordable housing over the next 20 years. During Phase 1, the HR&A Team conducted a comprehensive review of the County's current affordable housing programs and policies, analyzed demographic and market conditions, and performed a housing gap analysis to assess the current and likely future unmet affordable housing need. During Phase 2, the HR&A Team worked closely with a 32-person Steering Committee composed of local stakeholders to create a set of recommended tools to address Wake County's affordable housing needs now and in the future. These tools include County and municipal land use policy, new and modified leveraged programs, and sources of additional public resources. During Phase 3, the Team translated the housing need findings from Phase 1 and recommended tools from Phase 2 into a comprehensive plan for Wake County, which considers both the role of the county and the individual municipalities in execution. The plan was unanimously approved by the Wake County Board of Commissioners in October 2017, and the County is currently exploring new funding sources to enable full implementation.



New Orleans Inclusionary Zoning Feasibility Study, New Orleans, LA

On behalf of the City of New Orleans, HR&A led an assessment of feasibility for a proposed Inclusionary Zoning (IZ) program under consideration by the City and developed a set of recommendations for a policy that would maximize affordable housing production without stunting market expansion. To address growing concerns for residential affordability, the City proposed an inclusionary policy as a way to deliver affordable housing units in areas of high opportunity. HR&A, in coordination with local partner Urban Focus, began by reviewing existing real estate market conditions, assessing the applicability of existing and potential incentive tools, and engaging the development community to understand their greatest barriers to delivering mixed-income housing. HR&A then produced a city-wide financial pro forma to measure the impact of an inclusionary policy on development feasibility at varied levels of affordability and incorporating various locally available incentives. Based on these findings, HR&A recommended modifications to the proposed policy to better align it with current market conditions. HR&A's findings also included a detailed policy framework to allow decisionmakers to effectively implement, administer, and enforce an inclusionary policy that is both equitable and market appropriate. In March 2019, the New Orleans City Council passed an IZ policy based on HR&A's recommendations and the City is now in the process of implementing the policy.



Livable Buckhead Affordable Housing Strategy

Buckhead, an economic engine for the City of Atlanta, is experiencing a growing mismatch between its housing stock and labor force. As of 2016, 98% of Buckhead area employees commuted to and from the district from outside of Buckhead, a primary cause of traffic congestion in the neighborhood. HR&A, on behalf of the Buckhead Community Improvement District (BCID) and Livable Buckhead, developing a multi-pronged approach for meeting residential demand and expanding housing options across a broad range of household incomes in the Buckhead core. HR&A is conducting a housing assessment, examining demographic and housing market trends, a housing inventory analysis, and a broader market opportunity assessment. HR&A is also conducting a workforce analysis to create a detailed demographic summary of Buckhead's workforce and an origin-destination analysis by census tract. HR&A is completing a rental gap analysis to understand the current supply and need for units by rent level and sales price in Buckhead. Findings will be synthesized through an actionable toolkit of short-term, medium-term, and long-term recommendations to foster the production of housing to address the community's housing gap and congestion concerns. To inform these recommendations, HR&A will develop two financial models to identify the subsidies that would be required to support a range of affordability levels, focusing on the effects of zoning-based tools and subsidy vehicles for both rental and for-sale developments. The project will culminate in a final report and presentation to BCID.



Up for Growth Housing Regulation Research

In partnership with Up For Growth National Coalition, HR&A created an interactive and user-friendly webtool that quantifies the impact of local policies on housing affordability and availability. The tool is meant to support policy conversations by illustrating the tradeoffs between housing affordability and other public goals. This tool was first piloted for the City of Seattle and will be updated and expanded to additional cities.

HR&A managed the analysis, assembly, and articulation of the tool. HR&A designed the underlying financial and economic models for the calculator. We applied two fundamental models—a 10-year pro forma cash flow model and a stabilized-year residual land value model—to dynamically compute the impact of individual policy shifts on (1) the rent level and development feasibility for new apartment construction at the project level, and (2) the long-term housing production and rent levels at a citywide level. HR&A interviewed numerous local developers, policymakers, and academic economists to develop sound assumptions and methodologies.

To assist with roll-out, HR&A oversaw iterations of feedback, test runs, and edits. HR&A also drafted a public-facing white paper detailing the existing literature, project methodology, and key findings. The first version of the tool was publicly released on May 1, 2019, gathering attention and support from a wide coalition of housing policymakers, developers, and advocates at the local and national scales.

EQUITABLE DEVELOPMENT STRATEGIES



Equitable Development Plan & Impact Study for Harold Simmons Park

The Trinity Park Conservancy engaged HR&A to recommend implementable strategies to leverage a \$150M park investment on Harold Simmons Park, which will connect three distinct neighborhoods segregated by race and income. HR&A's Equitable Development Plan (EDP) provided the Conservancy with a detailed toolkit of policies, advocacy efforts, initiatives, and partnerships to achieve the organization's equitable development vision and benefit the diversity of neighboring communities. The Conservancy has begun implementation of the EDP, which will inform the organization's forthcoming programming plan, public sector engagement, and investment strategy in advance of a groundbreaking in 2020 or 2021.



Redevelopment Strategy for the Blue Valley Corridor

HR&A created a redevelopment strategy for Kansas City's 3,500-acre Blue River Valley Industrial Corridor to encourage job creation and advance equitable economic growth. Though the Blue Valley Corridor has benefited from recent flood mitigation investment, and active industrial uses and brownfield sites, the adjacent neighborhoods have faced long-term disinvestment. HR&A led a team to assess existing conditions, engage stakeholders, and define an economic and physical redevelopment vision. HR&A worked with the city's economic development corporation to identify priority locations, create physical concepts, and crafted an implementation strategy to attract investment through infrastructure investment and land acquisition and disposition.



Economic and Community Benefits of the Memphis Riverfront Plan

On behalf of the Memphis Riverfront Development Corporation, HR&A assessed the potential economic and community benefits of the Memphis Riverfront Concept, a plan for the city's six-mile riverfront along the Mississippi River. HR&A identified and described the expected economic benefits of the park including expanded opportunities for local businesses; increased real estate development and values; and additional tax revenue to the city. The benefits case also considered the community impacts associated with the park and an equity framework for the potential plan that outlined a strategy for using the park to serve all of Memphis' residents in an equitable manner across the design, construction, operation, and programming of the renewed riverfront.



Inclusive Incentive Strategy for Indianapolis, IN

Indianapolis is a growing city with an emerging tech hub, though like many cities, its growth has not been distributed evenly. Despite overall low unemployment, certain segments of the population in Indy struggle with long-term unemployment and have been unable to participate in Downtown Indy's growing momentum. Within this context, HR&A worked with the Greater Indianapolis Chamber of Commerce ("Indy Chamber") to evaluate its economic development incentive portfolio and ensure programs are aligned with City goals and priorities around promoting equitable growth and ensuring access to opportunity for all residents.

After reviewing past incentive usage and performance, HR&A traveled to Indianapolis and hosted a series of stakeholder roundtables designed to understand community priorities, as well as perceived opportunities and challenges, associated with re-orienting incentive programs to prioritize inclusivity. Following this initial round of engagement, HR&A benchmarked national best practices to help inform the development of recommendations for Indy, which included changes to the tax abatement and training grant programs as well as the establishment of a community impact network.

HR&A conducted further analysis to understand the potential economic and community impacts of proposed policy changes and crafted a narrative around the policy rationale and benefits associated with each recommendation. In the final phase of our work, HR&A supported the Chamber in their application for the JPMorgan Chase Advancing Cities Challenge and helped the Chamber operationalize our recommendations through the development of new metrics and associated deal evaluation tools, and by creating a roadmap for implementation. Indianapolis Mayor Joe Hogsett announced HR&A's recommendations – which prioritized a higher minimum wage, health and childcare benefits, workforce training, and positive community impacts – at a public press conference.



Pittsburgh Equitable Development Agenda

On behalf of the Heinz Endowments, HR&A is supporting grassroots organization, community groups, and advocacy groups better align and prioritize initiatives upon which they would like the City of Pittsburgh to focus. HR&A will engage with a set of leaders from these groups to inform recommendations and implementation strategy for a policy agenda. The effort is primarily focused on marginalized populations in the City who have not been able to participate in Pittsburgh's economic growth due to housing, transportation, workforce development, or other structural challenges. HR&A will equip leaders in these communities with tools to increase their influence the

city—including a guide to analyze City budget, issue campaign strategies, and capacity building workshops.

LOCAL & STATE EXPERIENCE



Imagine Gainesville Comprehensive Plan Racial Equity Update

HR&A is supporting the City of Gainesville in updating their Comprehensive Plan to ensure that the City's decisions over the next decade work together to address racial disparity and reinvest in underserved communities – particularly in majority Black and low-income neighborhoods. As the project manager for Imagine Gainesville, HR&A led focused research, interviews, and diagnostic analyses to identify where the City's current comprehensive plan fails to address and/or increases racial inequity today and historically. In response to this diagnosis, we developed a strategy to address these shortcomings with a comprehensive plan that 1) will be developed through a collaborative resident-centered process; 2) prioritizes addressing inequity through all of its policy frameworks; and 3) includes effective accountability mechanisms and success metrics in its implementation strategy. In phase two of this effort, HR&A will lead the implementation of a variety of community engagement techniques that leverage creative digital promotion and discourse platforms to support education, discussion, and policy development – including informative online events, listening sessions, collaborative workshops, produced and sourced video, and more. In parallel, HR&A will lead the facilitation of a series of inter-agency working groups with representation from more than two dozen agencies to articulate a racial equity vision within eight policy arenas, develop proposed policies and initiatives to eliminate racial disparity, and workshop proposals with a racially representative group of residents serving as fellows throughout the planning process.



Drivers of Multifamily Development Costs in Florida

HR&A conducted a research study to measure the costs and barriers to construction associated with multifamily development in Florida on behalf of the Florida Apartment Association (FAA). The study enabled FAA to effectively demonstrate the effect of specific policies on overall housing affordability and advocate for the adoption of policies, zoning, and processes that facilitate new construction and ultimately broaden housing affordability during the state's legislative session. HR&A conducted a series of interviews with developers, brokers, and lenders in four metros across Florida to better understand costs and how local development and entitlement processes and regulations facilitate or hinder new production of housing. In parallel, HR&A built a housing toolkit of effective policies and practices cities nationwide employ to facilitate the production of housing and reduce development costs. Building on these findings, HR&A produced four pro forma analyses of hypothetical multifamily developments to demonstrate drivers of housing affordability and cost. HR&A synthesized the findings in a presentation detailing recommended improvements to the state's housing policy framework that reduce development costs and improve housing production and affordability. HR&A has been further engaged to continue work with FAA on a study focused on the use of tax incentives to produce affordable housing.



Panama City, FL, Recovery Plan

HR&A is supporting the implementation of the City of Panama City's 2019 Economic Development Plan. Previously, in the wake of the destruction brought by Category 5 Hurricane Michael, HR&A identified a suite of business development, housing, education, and land use programs to pursue, and crafted detailed implementation plan with timeline, metrics, governance recommendations, and prioritization framework. This second phase of work will focus on program implementation, including housing program design, neighborhood blight removal, and code enforcement, redevelopment of catalytic sites, improving small businesses services, and positioning the City to access Federal resources including disaster recovery funds tied to the Covid-19 pandemic. In October 2019, the final Economic Development Plan was presented to and accepted by City leadership, who have already implemented several key recommended programs, including blight removal and catalytic redevelopment programs.



Imagine Clearwater

On behalf of the City of Clearwater, HR&A led a team to develop an action-oriented, community-led master plan to activate a 66-acres of downtown waterfront. HR&A developed a vision to transform Clearwater's downtown park into an expanded signature space as a way to rebrand downtown, increase visitation, improve connectivity and accessibility, and catalyze adjacent residential development. This plan included a phased redevelopment strategy for potential catalyst sites, a vision and framework for public and private investment, and an action-oriented implementation plan. Throughout the master planning process, HR&A worked with the City to conduct a comprehensive public engagement strategy that included seven community workshops, with over 700 community members participating.

Since the City Council approved master plan, the City – in partnership with key stakeholders who participated in the master planning process – is making the vision laid out in Imagine Clearwater a reality. This has included voter approval of modifications to the city charter to allow for implementation of the master plan, and the City's pursuit of a detailed design and engineering scheme for the redevelopment, due to be completed by the mid-late 2020s



Jacksonville Riverfront Investment Strategy

HR&A advised the Jacksonville Downtown Investment Authority on a vision and implementation framework to revitalize the downtown waterfront. Since 2000, the area has seen over \$3 billion in investment in infrastructure, housing, and commercial uses. Still, downtown Jacksonville lags peer cities and additional investment is needed to realize the City's vision of it being the metro's epicenter. Following an analysis of demographic and market conditions and key stakeholder outreach, HR&A developed an actionable investment strategy for the downtown waterfront that is rooted in tenets of placemaking and activation, grounded in market conditions, and accompanied by a practical strategy for implementation to support downtown development. The strategy emphasizes site-specific opportunities along the riverfront while also identifying strategies for supporting sites upland and creating connections among key activity centers throughout downtown and on both banks of the St. Johns River. The strategy is serving as a framing document for the Downtown Investment Authority as it transitions leadership and leads the revitalization of downtown in the short and long-term.

Team

HR&A Partner Andrea Batista Schlesinger will continue to lead our team's work with the City of Gainesville as Partner-in-Charge and will be substantively involved in all aspects of the project. Drawing on my expertise in political transitions, organizational strategy and capacity building, program and policy design and implementation, and stakeholder and community engagement, I will continue to work with the City of Gainesville to design strategies that make the City more inclusive and growth more equitable.

Lydia Gaby, Director at HR&A, will continue to oversee HR&A's engagement with the City and act as a point of contact for regular communications, coordination with the Department, and ensure coordination among different workstreams. Lydia leads economic development projects, impact and market analyses, and manages large-scale participatory projects with public sector clients.

Olivia Moss, Principal at HR&A, will serve as Project Manager for this work and will also serve as a point of contact for the client and production of all deliverables. Olivia leads projects in the firm's real estate advisory practice, including for public and private sector clients seeking to craft compelling development plans, demonstrate project benefits, and negotiate complex transactions. She supports public sector clients in development of solicitation processes to procure private development partners, assists public and private clients in evaluations of development feasibility for a variety of projects, and helps clients to prepare for and navigate major policy changes or proposals.

We will be supported in this engagement by HR&A's 80+ management and analytical staff members.

Throughout this study, we anticipate having regular interactions with the City team and making presentations to City leadership (including the City Manager, City Commission and Mayor, and potentially City Boards, as needed) at key milestones (as identified in the scope above). Day to day interactions will typically be with Olivia and one or two analytical support staff, depending on our specific task. For instance, we anticipate that two analyst-level (Senior Analyst, Analyst, or Research Analyst) staff members would support our Task 2 and Task 4 work to allow us to move expeditiously, while one staff member might support Task 3 work (depending on the number of briefs to be produced).

Additional information on our key team members is attached.



EDUCATION

London School of Economics
Master of Science, History
2013

Columbia University
Master of Arts, History
2012

University of Chicago
Bachelor of Arts, Public Policy
1994 - 1999

WORK EXPERIENCE

HR&A Advisors, Inc.
Partner
2017 – Present

Open Society Foundations
Deputy Director, US Programs
2013 – 2017

City University of New York
Adjunct Professor
2011

City of New York
Special Advisor to the Mayor
2010 – 2011

Bloomberg for New York
Senior Advisor
2009 – 2010

Drum Major Institute for Public Policy
Executive Director
2002 – 2009

PUBLICATIONS

The Death of "Why?": The Decline of Questioning and the Future of Democracy
2009, Berrett-Koehler

AWARDS AND HONORS

Gay City News Impact Awards Honoree

LatinaPAC Dolores Huerta Award
Recipient

ANDREA BATISTA SCHLESINGER

PARTNER

Andrea Batista Schlesinger leads the Inclusive Cities practice at HR&A, where she brings expertise in organizational strategy and capacity building, program and policy design and implementation, and stakeholder and community engagement to design strategies that make cities more inclusive and growth more equitable. Her work focuses on supporting equitable economic development and removing barriers to opportunity for all communities in cities, through working to effect change in workforce development, education, criminal justice, racial equity, and other fields. Andrea comes from the Open Society Foundations, George Soros' global philanthropy, where she was Deputy Director of US Programs. Previously, Andrea served as a Special Advisor to New York City Mayor Michael R. Bloomberg and as Executive Director of the Drum Major Institute for Public Policy, originally founded by an advisor to Rev. Dr. Martin Luther King, Jr.

Economic and Community Benefits of the Memphis Riverfront Plan, TN

Evaluating the economic and community benefits associated with the Memphis Riverfront Concept, a connective plan for the 6-mile waterfront. Estimating the established economic impacts of the plan, comparing the park's economic opportunities to baseline conditions and studying the effects of the development of the park on inclusion and equity. Quantifying the anticipated order-of-magnitude benefits of the investment using local market research, case study analysis, and findings from the visit. Also considering the community impacts associated with the park and how the park can serve residents in an equitable manner.

Harold Simmons Park Equitable Development Plan, Dallas, TX

For the Trinity Park Conservancy, prepared the Equitable Development Plan (EDP) for the area surrounding the new Harold Simmons Park. First, analyzed real estate market, demographic, and socioeconomic data for Park-adjacent neighborhoods and the City of Dallas to understand the perceived and realized changes in neighborhoods likely to be impacted by the Park. Completed an in-depth review of policies, development approaches, partnership structures, and programs in Dallas and across the US that mitigate the potential negative impacts of the Park and maximize the positive role the project can play in addressing legacies of disinvestment and racial inequity. Developed an Equity Toolkit. Provided discrete tactics to prevent involuntary displacement, facilitate the creation of opportunity neighborhoods, protect cultural heritage, generate collective investment and ownership opportunities and establish equitable policies and practices within the Conservancy. Prepared an action plan to guide implementation of the EDP, detailing roles and responsibilities for Conservancy, the City, and private partners.

Philadelphia Poverty Reduction Strategy

Working with the City Council of Philadelphia to reduce Philadelphia's poverty rate by recommending policy recommendations tailored to local needs and economic conditions. Focusing on strategies related to housing, workforce development, and increase utilization of State- and City-provided benefits programs, and then prioritizing these programs and assessing their effectiveness at reducing poverty using a customized, common framework that the City Council can use as a tool to successful advocate for antipoverty programs.

New York City EarlyLearn Integration & Racial Equity Plan

Supporting the City of New York in integrating the EarlyLearn program—a system of services for children ages 0-5—from management under the Administration of Children's Services into the Department of Education. Creating recommendations on operational design, organizational structure, personnel needs, and culture of EarlyLearn as a part of a complex integration process with the potential to be a powerful force to prepare New York's children

ANDREA BATISTA SCHLESINGER

PARTNER

for educational success. Evaluating peer city approaches to implementing organizational practices and policies that support racial equity.

U.S. Conference of Mayors Equity Agenda

On behalf of the U.S. Conference of Mayors, designed and managed a multi-city program to equip city leaders and staff with the resources needed to advance racial equity in their cities. Conducted a landscape analysis in cities across the country to understand their aspirations, obstacles encountered, and resources needed to achieve racial and economic equity goals. This analysis informed the creation of a new national racial equity program to provide capacity building and curated technical assistance to senior leadership within cities.

Talking Transition: Harris County, TX

Leading program development and management for Harris County Judge Lina Hidalgo's Talking Transition initiative. To ensure all residents understand how county government works—and how they can change it for the better—the framework for Talking Transition includes: a county-wide survey seeking input on topics to inform the Judge's priorities; a series of community town halls with community discussions and assembly-style dialogues around policy themes; a series of open "office hours" that invite residents to learn what different County agencies do, how they work, and actionable information about the services, programs, and civic participation opportunities that they offer residents; and a series of workshops for stakeholder organizations to collectively craft recommendations around specific policy issues to inform the Judge's Year 1 Action Plan.

Establishing a City-Owned Public Bank in Seattle, WA

Developed a feasibility study concerning the City of Seattle's development of a municipally-operated bank as an alternative to its expiring financial services contract with Wells Fargo. Seattle is among the first cities in the United States to consider such an option. The study examined the universe of potential funding and governance structures as well as their associated trade-offs in terms of risk and benefit. The study also identified actions and approvals required for an array of banking activities, and proposed a robust series of complementary approaches that the City may want to consider to achieve its objectives given the political and financial challenges of forming a City-owned bank and the difficulty of achieving large-scale public benefits within the existing legal and regulatory framework.

Open Society Foundation Puerto Rico Recovery Strategy

On behalf of the Open Society Foundations, evaluated the feasibility of an initiative to provide technical assistance and capacity building to Puerto Rican mayoral and municipal leadership as they rebuild from the devastation of the 2017 hurricane season. Through stakeholder interviews with Puerto Rican government officials, private stakeholders, and philanthropic organizations, evaluated municipal recovery needs on the ground. Proposed the design of a municipal technical assistance and capacity building program with recommendations for how to operationalize and fund, taking a two-pronged approach that will include: network management of a mayor-to-mayor matching program to pair mainland U.S. mayors with Puerto Rico's mayors to exchange disaster recovery best practices, and content development and delivery of a series of regional workshops to build the capacity of Puerto Rico's mayors and municipal staff on topics such as resiliency planning, fiscal health, and economic development.



OLIVIA MOSS

PRINCIPAL

EDUCATION

Columbia University
Graduate School of Architecture Planning
and Preservation
Master of Science
Real Estate Development
2012

University of Washington
Bachelor of Arts
Communication
2008

WORK EXPERIENCE

HR&A Advisors, Inc.
Principal
2016 – Present

HR&A Advisors, Inc.
Director
2015 – 2016

HR&A Advisors, Inc.
Senior Analyst
2013 – 2015

HR&A Advisors, Inc.
Analyst
2012 – 2013

HR&A Advisors, Inc.
Analyst Fellow
Summer 2012

Manoherian Brothers
Director of Leasing
2010 – 2011

Manoherian Brothers
Assistant Property Manager
2009 – 2010

AFFILIATIONS

Urban Land Institute
Young Leader

UrbanGlass
Real Estate Committee Member

Since joining HR&A in 2012, Olivia Moss has supported the firm's real estate advisory practice through engagement with public and private sector clients seeking to craft compelling development plans, demonstrate project benefits, and negotiate complex transactions. Olivia's recent work includes supporting public sector clients in development of solicitation processes to procure private development partners, assisting public and private clients in evaluations of development feasibility for a variety of projects, and navigating major policy changes or proposals. She has worked with clients across the nation in places such as New York City, San Francisco, Seattle, Detroit, and Charlotte. Olivia holds a B.A. in Communication from the University of Washington and a master's in Real Estate Development from Columbia University, where she served as a research assistant to the director of the program.

Inclusionary Housing Feasibility Study & Multifamily Affordable Housing Strategy for the City of Detroit

Advised the City of Detroit on policies to inform the development of an inclusionary housing plan. Assessed local real estate market and area demographics and analyzed demand for residential development. Additionally, assessed the financial feasibility of market rate housing and affordable housing utilizing various forms of subsidy. For select neighborhoods, conducted a detailed analysis of area market potential and tested the feasibility of various affordable housing programs. Identified best practices from comparable cities to support findings and advised on potential additional or alternative strategies to foster development of affordable housing, such as a housing trust fund.

Building on recommendations developed in the first phase of work, supported the City of Detroit in development of a strategic multifamily affordable housing strategy, expressing the City's housing priorities and guiding the Housing & Revitalization Department's future actions related to affordable housing development and preservation, inclusive growth, homelessness, and property tax policy. Directed the development and refinement of the plan's policy initiatives, drafted content, and oversaw plan production. Worked closely with HRD on the release of the [Multifamily Affordable Housing Strategy](#), with the goal of preserving 10,000 existing affordable units and developing 2,000 new affordable units by 2023.

Battery Park City Authority Real Estate Advisory Services, New York, NY

Serves as an on-call real estate advisor to the Battery Park City Authority (BPCA), which manages a 92-acre mixed-use neighborhood in Lower Manhattan. Today, the Authority faces a number of complex public policy and real estate questions surrounding its future public policy priorities, including sustainability, resiliency, and affordable housing, the structure and terms of long-term ground leases, and planning for district-level capital investments. Leading a range of services to support the Authority's policy and transactional goals, including market analysis, policy analysis, financial analysis, guidance on policy and goal setting, and negotiation and transaction support.

Developer Solicitation for County-Owned Sites in Uptown Charlotte, NC

Building on a previously completed HR&A analysis and strategy for land disposition, advised Mecklenburg County on the disposition of two redevelopment sites in Uptown Charlotte. Managed the revision and release of a Request for Qualifications followed by a full Request for Proposals and marketed the opportunity to local and national developers. Upon receipt of responses to both the RFQ and RFP, led the team's evaluation of responses, advised the

OLIVIA MOSS

PRINCIPAL

County staff and Board of County Commissioners on the strengths and weaknesses of each respondent, followed by negotiations of a term sheet to outline the proposed program and key terms of the economic offer, and support in developing and negotiating a development agreement. A master redevelopment agreement was executed by the County and its preferred development partner in July 2018.

Real Estate Advisory Services for Future Development in Gowanus, Brooklyn

Served as project manager for a multidisciplinary team including designers, engineers, and public relations consultants to produce a clear vision and benefits case for mixed-use development along the waterfront in the Gowanus on behalf of four landowners awaiting a City-led rezoning of the area. Developed a financial model to evaluate the financial feasibility of Property Market Group's (PMG) proposed program, tested program alternatives, and created a narrative and presentation for initial discussions with the New York City Department of City Planning.

On behalf of a client group including PMG, the Domain Companies, and Monadnock Development, currently overseeing studies on the potential impacts of the client group's proposed programs on local infrastructure, transit and transportation, and the look and feel of the neighborhood to prepare the group for discussions with the City and community stakeholders. Supporting the client group in ongoing conversations with the City, elected officials, and community stakeholders in Gowanus as the City-led rezoning effort progresses.

Market Analysis & Program Strategy for a Private Developer in Detroit, MI

On behalf of a major regional developer, performed a market segmentation analysis to support an in-depth demand analysis for multifamily product in downtown Detroit, MI. The analysis, supported by microdata from the Census Bureau, provided the developer with information about target resident groups, the market for planned projects, and estimates of absorption potential under high-growth and moderate-growth scenarios. These findings informed a set of programming recommendations for future investments in the area.

Brooklyn Community Services Asset Analysis, Brooklyn, NY

On behalf of Brooklyn Community Services (BCS), evaluated the potential financial value of alternative disposition and redevelopment scenarios for property BCS owns in Downtown Brooklyn that currently houses the headquarters for the century-old non-profit. Examined proposals from potential buyers and alternate sale, relocation, and build-to-suit scenarios that maximize the value BCS would receive from its asset and strengthen BCS's ability to continue to provide services to Brooklyn residents into the future. In order to evaluate development partner offers, developed assumptions for financial analysis through market research and outreach to local brokers and developers, taking into consideration the value that BCS's non-profit status may add to a project. Supported BCS in development partner negotiations as well as internal deliberations. In late 2014, BCS completed a transaction for the sale of the headquarters building to a local development firm, to be redeveloped with space built back for BCS's operations to continue in their historic home.

In 2018, BCS re-engaged HR&A to evaluate the implications of restructuring its agreement with the selected development partner. Analyzed local market trends and the impact of restructuring elements of the original development agreement to inform BCS' negotiations.



LYDIA GABY
DIRECTOR

EDUCATION

Harvard College
Bachelor of Science
Environmental Science and Public Policy
2015

Phillips Exeter Academy
2010

WORK EXPERIENCE

HR&A Advisors, Inc.
Director
2020 – Present

HR&A Advisors, Inc.
Senior Analyst
2019 – 2020

HR&A Advisors, Inc.
Analyst
2016 – 2018

HR&A Advisors, Inc.
Research Analyst
2015 – 2016

Harvard University Graduate School of Design
Research Assistant
2014 – 2015

AWARDS

HT Fisher Prize in GIS

David Rockefeller International
Experience Grant for study in Venice,
Italy

Harvard University Center for the
Environment Research Fellowship

Lydia provides analytical and research support to economic development projects, impact and market analyses, and manages organizational strategy projects. She supports a variety of HR&A services including program design and organizational strategy, inclusive economic revitalization, and racial equity planning.

Equitable Master Plan Framework for Greenwood Park, Baton Rouge, LA

On behalf of the City of Baton Rouge and as part of a team led by Sasaki Associates, helped inform a conceptual programming and funding strategy to assist with the catalytic redevelopment of Greenwood Community Park, one of the largest public parks in East Baton Rouge Parish, and a significant amenity for the residents of the North Baton Rouge community and the visitors to the Baton Rouge Zoo, which is located within the park. Participated in a workshop with City stakeholders to identify programming goals and operating budget considerations. Produced case studies demonstrating a range of operating and funding models from successful parks around the country. Estimated the revenue potential of four priority program uses, and helped inform a phasing strategy for the long-term build-out of the park. The Parks and Recreation Commission for the Parish of East Baton Rouge approved the park's [master plan](#) in September, 2019, allocating \$25-\$35 million in public funding for the implementation of Phase 1.

Talking Transition: Harris County, TX

Served as deputy program manager for Harris County Judge Lina Hidalgo's Talking Transition initiative. To ensure all residents understand how county government works—and how they can change it for the better—the framework for Talking Transition includes: a county-wide survey seeking input on topics to inform the Judge's priorities; a series of community town halls with community discussions and assembly-style dialogues around policy themes; a series of open "office hours" that invite residents to learn what different County agencies do, how they work, and actionable information about the services, programs, and civic participation opportunities that they offer residents; and a series of workshops for stakeholder organizations to collectively craft recommendations around specific policy issues to inform the Judge's Year 1 priorities.

Memphis Riverfront Concept Benefits Analysis

Evaluating the economic and community benefits associated with the Memphis Riverfront Concept, a connective plan for the 6-mile waterfront. Estimating the established economic impacts of the plan, comparing the park's economic opportunities to baseline conditions and studying the effects of the development of the park on inclusion and equity. Quantifying the anticipated order-of-magnitude benefits of the investment using local market research, case study analysis, and findings from the visit. Also considering the community impacts associated with the park and how the park can serve residents in an equitable manner.

Racial Equity Program Design and Implementation

To support the NYC DOE's Division of Early Childhood Education (DECE), HR&A is currently leading efforts to incorporate racial equity principles into the organizations' policies and practices. Key areas of focus will include recruitment, talent management and retention, and potentially decision-making, community engagement, and program quality standards, among other focuses. In a first phase of work, HR&A is conducting client and subcontractor research to understand best practices and optimal processes for racial equity planning work. Upon confirmation of a preferred approach, HR&A led subcontracting efforts and support the division's development of a Racial Equity Plan, which will include goals, recommendations,

and an implementation strategy.

Downtown Revitalization in New York State

For New York State's Downtown Revitalization Initiative (DRI), HR&A will lead a technical consulting team for three downtown communities awarded \$10 million each in state funds: Plattsburgh, Jamestown, and Jamaica, Queens. In concert with the NYS Department of State and Local Planning Committees, HR&A and a team of planning, design, and engineering subconsultants will help identify priority projects and broader investment strategies that can be supported with the \$10 million of state funds; provide technical analysis to guide project-specific implementation strategies; and develop strategic investment plans that advance project execution and position the downtown areas to leverage additional public and private investments toward future downtown growth. Ultimately, the goal of DRI is to transform these downtown areas into places where tomorrow's workforce will want to live, work and raise a family.

Imagine Boston 2030: Citywide Planning in Boston, MA

Developed the City of Boston's comprehensive plan, Imagine Boston 2030, to set the agenda for the city's growth, investment, and development. Based on feedback from a range of community members and stakeholders, as well as extensive analysis of citywide conditions and international best practices, generated a vision for Boston's future across policy domains including people, economy, places, and environment, for codification in a strategic vision plan outlining future goals, indicators, and targets. Following community review of the strategic vision plan, led detailed analysis and refine processes, timelines, and funding sources to achieve specific placed-based initiatives by 2030.

Gentilly Resilience District Implementation

Supported the City of New Orleans in its implementation of a \$141 million resilience building project proposal for a low to moderate income neighborhood in New Orleans. Supported the development of new parks and open space through the creation of supplemental capital financing and ongoing funding strategies. Developed governance and implementation strategies to ensure the programs within the Gentilly Resilience District are scalable Citywide in the future

Buckhead Park over GA400

On behalf of the Buckhead Community Improvement District (BCID), HR&A is supporting Rogers Partners and Nelson Byrd Woltz in the conceptual design and implementation strategy for a new signature park in Buckhead over Atlanta's GA 400 highway. The current engagement builds on an intensive funding strategy developed in Stage 1 that set the stage for the development of a more detailed economic impact study and funding strategy, and developed a clear picture of a projects with an associated funding approach, limited technical barriers to implementation, and a strong enough place-making impact that can be completed as a meaningful first phase. In this second phase of engagement, HR&A is developing a preliminary programming strategy and operations and maintenance budget for the new park for discussion with the Board of the BCID.

Skillful Workforce Development Initiative, The Markle Foundation

On behalf of Skillful, an initiative of the Markle Foundation, supported the design a workforce development program in Indiana that helps organizations and employers better match unemployed and underemployed residents with open jobs. Worked as an extension of the Skillful team to identify potential Indiana partners and funders and created an operations plan for launch and program implementation.

REQUIRED FORMS



Procurement Division
200 E University Avenue, Rm 339
Gainesville, FL 32601
(352) 393-8789
December 14, 2020

REQUEST FOR PROPOSAL: #DOSD-210014-GD
Gainesville, FL, Zoning Review & Inclusionary Study

PRE-PROPOSAL MEETING: Non-Mandatory Mandatory N/A Includes Site Visit
DATE: Monday, January 4, 2021 **TIME:** 10:00am Eastern Time
LOCATION: ZOOM – all Zoom access information is located in Exhibit F

QUESTION SUBMITTAL DUE DATE Thursday, January 7, 2021, 3:00pm Eastern Time

DUE DATE FOR UPLOADING PROPOSAL: Thursday, January 14, 2021; 3:00pm Eastern Time

SUMMARY OF SCOPE OF WORK: The City of Gainesville is seeking a consultant to assist with the development of a series of policy and program efforts related the City's equitable development goals.

For questions relating to this solicitation, contact: Gayle Dykeman, dykemangb@cityofgainesville.org

Bidder is not in arrears to City upon any debt, fee, tax or contract: Bidder is NOT in arrears Bidder IS in arrears
Bidder is not a defaulter, as surety or otherwise, upon any obligation to City: Bidder is NOT in default Bidder IS in default

Bidders who receive this bid from sources other than City of Gainesville Procurement Division or DemandStar.com MUST contact the Procurement Division prior to the due date to ensure any addenda are received in order to submit a responsible and responsive offer. Uploading an incomplete document may deem the offer non-responsive, causing rejection.

ADDENDA ACKNOWLEDGMENT: Prior to submitting my offer, I have verified that all addenda issued to date are considered as part of my offer: Addenda received (list all) #_1, 2_____

Legal Name of Bidder HR&A Advisors, Inc.

DBA: N/A

Authorized Representative Name/Title: Andrea Batista Schlesinger

E-mail Address: abs@hraadvisors.com FEIN: 20-8767681

Street Address: 99 Hudson Street, Floor 3, New York, NY 10013

Mailing Address (if different): N/A

Telephone: (646) 695-5318 Fax: () _____

By signing this form, I acknowledge I have read and understand, and my business complies with all General Conditions and requirements set forth herein; and,

Proposal is in full compliance with the Specifications.

Proposal is in full compliance with the Specifications except as specifically stated and attached hereto.

SIGNATURE OF AUTHORIZED REPRESENTATIVE: _____

SIGNER'S PRINTED NAME: Andrea Batista Schlesinger **DATE:** 1/13/2021

This page must be completed and uploaded to DemandStar.com with your Submittal.

EXHIBIT B BIDDER VERIFICATION FORM

1. LOCAL PREFERENCE (Check one)

Local Preference requested: YES NO

A copy of the following documents must be included in your submission if you are requesting Local Preference:

- a) Business Tax Receipt
- b) Zoning Compliance Permit

2. Qualified Small Business and/or Service Disabled Veteran Business Status (Check one)

Is your business qualified, in accordance with the City of Gainesville’s Small Business Procurement Program, as a local Small Business? YES NO

Is your business qualified, in accordance with the City of Gainesville’s Small Business Procurement Program, as a local Service-Disabled Veteran Business? YES NO

3. Living Wage Compliance

See Living Wage Decision Tree: (Check one)

Living Wage Ordinance does not apply (check all that apply)

Not a covered service

Contract does not exceed \$100,000

Not a for-profit individual, business entity, corporation, partnership, limited liability company, joint venture, or similar business, who or which employees 50 or more persons, but not including employees of any subsidiaries, affiliates or parent businesses.

Located within the City of Gainesville enterprise zone.

Living Wage Ordinance applies and the completed Certification of Compliance with Living Wage is included with this bid.

NOTE: If Contractor has stated Living Wage Ordinance does not apply and it is later determined Living Wage Ordinance does apply, Contractor will be required to comply with the provision of the City of Gainesville’s living wage requirements, as applicable, without any adjustment to the bid price.

4. REGISTERED TO DO BUSINESS IN THE STATE OF FLORIDA

Is Bidder registered with Florida Department of State’s, Division of Corporations, to do business in the State of Florida?

YES NO (refer to Part 1, 1.6, last paragraph)

If the answer is “YES”, provide a copy of SunBiz registration or SunBiz Document Number

(#_ F19000004117 _____)

If the answer is “NO”, please state reason why: _____

5. DIVERSITY AND INCLUSION (Applies to solicitations above \$50,000)

Does your company have a policy on diversity and inclusion? YES NO

If yes, please attach a copy of the policy to your submittal.

Note: Possessing a diversity and inclusion policy will have no effect on the City’s consideration of your submittal, but is simply requested for information gathering purposes.

HR&A Advisors, Inc.

Bidder’s Company Name

Andrea Batista Schlesinger, Partner

Printed Name/Title of Authorized Representative


Signature of Authorized Representative

1/13/2021
Date

This page must be completed and uploaded to DemandStar.com with your Submittal.

Equal Employment Opportunity and Anti-Harassment Policy

HR&A Advisors, Inc. and Ambrose Employer Group, LLC (“Ambrose”) are committed to ensuring equal employment opportunity for all employees, including qualified employment applicants. The companies strive to maintain an environment free of discrimination based on race, color, religion, gender, national origin, ancestry, age, disability, veteran status, marital status, sexual orientation, citizenship, creed, sex or any other protected category or characteristic. This equal employment opportunity policy applies to all employment practices, including but not limited to recruiting, hiring, advertising, promotion, transfer, reductions in force, social and recreational programs, training, employee development, compensation and fringe benefits, discipline and termination.

Because this policy is central to the manner in which the companies operate as employers, any employee who has a question or concern regarding this policy should bring it to the attention of a member of the Equal Employment Opportunity and Anti-Harassment Committee (see below for committee members and contact information). Any person found to have violated this policy will be disciplined, up to and including termination. Any applicant or employee filing a complaint or assisting in the investigation of a complaint is protected from retaliation, coercion, intimidation, interference, and discrimination.

Policy Against Workplace Harassment

HR&A Advisors, Inc. and Ambrose are committed to maintaining a productive work environment in which all individuals are treated with mutual respect and dignity. Each employee is required to contribute to a professional atmosphere that promotes equal opportunity and nondiscriminatory practices. In keeping with this commitment, harassment or inappropriate conduct in any form will not be tolerated. Examples of such inappropriate practices include, but are not limited to:

- Sexual and/or racial harassment;
- Any other harassment, bias or prejudice on the basis of any characteristic protected by law; and
- Inappropriate conduct that disrupts or interferes with another's work performance or creates an intimidating, offensive, or hostile environment.

This policy applies to all work locations and in any work-related setting outside the workplace, such as business trips and business-related social events. Employees are required to exhibit, in their conduct and communications, sound judgment and respect for every other employee and all other persons (e.g., vendors, consultants, and clients) with whom HR&A Advisors, Inc. does business. Insulting, degrading, exploitative, or discriminatory treatment, whether verbal or physical, will not be tolerated. Similarly, inappropriate conduct directed to employees by outside vendors, consultants or clients is prohibited. An employee with any questions or concerns regarding this policy should discuss them with a member of the Equal Employment Opportunity and Anti-Harassment Committee. Each employee may be required periodically to acknowledge his or her understanding of this policy against harassment.

Sexual Harassment

HR&A Advisors, Inc. and Ambrose do not tolerate workplace sexual harassment and consider it to be a serious offense.

Sexual harassment is unwanted sexual attention of a persistent or offensive nature made by a person who knows, or reasonably should know, that such attention is unwanted. Sexual harassment includes sexually oriented conduct that is sufficiently pervasive or severe to unreasonably interfere with an employee's job performance or create an intimidating, hostile, or offensive work environment. While sexual harassment encompasses a wide range of conduct, some examples of prohibited conduct include:

- Promising, directly or indirectly, a reward if the employee complies with a sexually oriented request;
- Threatening, directly or indirectly, to retaliate against an employee if the employee refuses to comply with a sexually oriented request;
- Denying, directly or indirectly, an employment-related opportunity if the employee refuses to comply with a sexually oriented request;
- Engaging in sexually suggestive physical contact or touching another employee in a way that is unwelcome;
- Displaying, storing, or transmitting pornographic or sexually oriented materials using company equipment or facilities;
- Indecent exposure; or
- Making sexual or romantic advances toward an employee and persisting despite the employee's rejection of the advances.

Sexual harassment may involve individuals of the same or different gender and is prohibited whether directed toward men or women and regardless of whether the targeted individual accepts or rejects the advances or other offensive behavior. Sexual harassment can be physical and/or psychological in nature. A pattern of incidents can constitute sexual harassment even if one of the incidents considered on its own would not be harassment. Employees are prohibited from harassing other employees whether or not the incidents of harassment occur on company premises and whether or not the incidents occur during working hours.

Discriminatory Conduct Prohibited

To the same degree as sexual harassment, this policy also prohibits harassment or other inappropriate conduct on the basis of race, color, religion, gender, national origin, ancestry, age, disability, veteran status, marital status, sexual orientation, citizenship, creed, sex, or any other protected category or characteristic.

Reporting Harassment, Discrimination Or Retaliation

Employees who believe they have been subjected to unlawful discrimination or harassment of any kind are required to promptly report the matter to a member of the Equal Employment

Opportunity and Anti-Harassment Committee. The members of the Equal Employment Opportunity and Anti-Harassment Committee and their contact information can be found at:

<http://www.ambrose.com/misc/eeo.html>

If an employee believes he or she has witnessed prohibited harassment or other inappropriate behavior, such employee must also notify a member of the Equal Employment Opportunity and Anti-Harassment Committee.

Any employee who becomes aware of unlawful discrimination or harassment of any kind, including sexual harassment, has an obligation to report it promptly to a member of the Equal Employment Opportunity and Anti-Harassment Committee. Likewise, if anyone in a supervisory role receives information regarding prohibited harassment or discrimination, even if the activity is in another area of the firm, he or she is obligated to report it immediately to a member of the Equal Employment Opportunity and Anti-Harassment Committee.

Investigation of Complaint

The companies are committed to promptly investigating every complaint and effectively resolving any instance of harassment or discrimination. Each person making a complaint, the alleged harasser/discriminator and all knowledgeable employees have an obligation to cooperate fully with an investigation. The investigation may include individual interviews with those involved and, when necessary, with individuals who may have observed the alleged conduct or may have relevant knowledge. The complaint and investigation will be handled with sensitivity, under the direction of the Equal Employment Opportunity and Anti-Harassment Committee. Confidentiality will be maintained throughout the investigation to the extent practical and appropriate under the circumstances, considering the sensitive interests of all involved.

Protection Against Retaliation

No one who objects to prohibited harassment or conduct, makes a complaint, or assists in an investigation will be subjected to coercion, intimidation or retaliation. Retaliation is a serious violation of this policy and will be treated with the same corrective action as would the harassment or discriminatory conduct itself. Acts of retaliation must be reported immediately to the Equal Employment Opportunity and Anti-Harassment Committee and will be investigated promptly.

Responsive Action

Any person found to have committed prohibited discrimination, harassment or retaliation will be subjected to disciplinary action up to, and including, termination.

False or Malicious Accusations

False, malicious complaints of prohibited harassment - as opposed to complaints that, even if erroneous, are made in good faith - may be the subject of appropriate corrective action.

EXHIBIT A DRUG-FREE WORKPLACE FORM

The undersigned bidder in accordance with Florida Statute 287.087 hereby certifies that


HR&A Advisors, Inc.

_____ does:

(Name of Bidder)

- a. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
- b. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for the drug abuse violations.
- c. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
- d. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
- e. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
- f. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this bidder complies fully with the above requirements.



 Bidder's Signature

1/13/2021

Date

In the event of a tie bid, bidders with a Drug Free Workplace Program will be given preference. To be considered for the preference, this document must be completed and uploaded to DemandStar.com with your Submittal.

EXHIBIT C REFERENCE FORM

Company Name of Bidder: HR&A Advisors, Inc.

Provide information for three references of similar scope performed within the past three years.
You may include photos or other pertinent information.

#1 Year(s) services provided (For Example: 1/2018 to 12/2019): 12/2018 - 5/2019

Company Name: Trinity Park Conservancy

Address: 1444 Oak Lawn Ave, #200

City, State Zip: Dallas, TX 75207

Contact Name: Elissa Hoagland

Phone Number: 214-740-1616 Fax Number: _____

Email Address: elissa@trinityparkconservancy.org

#2 Year(s) services provided (For Example: 1/2018 to 12/2019): 5/2018 - 5/2019

Company Name: Indy Chamber

Address: 111 Monument Circle, Suite 1950

City, State Zip: Indianapolis, IN 46204

Contact Name: Ian Nicolini

Phone Number: 317-464-2218 Fax Number: _____

Email Address: inicolini@indychamber.com

#3 Year(s) services provided (For Example: 1/2018 to 12/2019): 12/2019 - Present

Company Name: Florida Apartment Association

Address: 200 E. Robinson Street Suite 900

City, State Zip: Orlando, Florida 32801

Contact Name: Amanda Gill

Phone Number: 407-960-2910 Fax Number: _____

Email Address: amanda@faahq.org

This page must be completed and uploaded to DemandStar.com with your Submittal.

EXHIBIT E CERTIFICATION OF COMPLIANCE WITH LIVING WAGE

The undersigned hereby agrees to comply with the terms of the Living Wage Ordinance and to pay all covered employees, as defined by City of Gainesville Ordinance 020663 as amended at 030168 (Living Wage Ordinance), during the time they are directly involved in providing covered services under the contract with the City of Gainesville for a living wage of \$12.5962 per hour to covered employees who receive Health Benefits from the undersigned employer and \$13.8462 per hour to covered employees not offered health care benefits by the undersigned employer.

N/A

Name of Service Contractor/Subcontractor: HR&A Advisors, Inc.

Address: 99 Hudson Street, Floor 3, New York, NY 10013

Phone Number: 212-977-5597

Name of Local Contact Person: Andrea Batista Schlesinger


Address: 99 Hudson Street, Floor 3, New York, NY 10013

Phone Number: 646-695-5318

\$ \$200,000
(Amount of Contract)

Andrea Batista Schlesinger, Partner

Printed Name/Title of Authorized Representative

 1/13/2021
Signature of Authorized Representative Date

This page must be completed and uploaded to DemandStar.com with your Submittal, if the Living Wage Ordinance applies.



City of Gainesville

Budget and Finance Department
Purchasing Division

Addendum Publish Date: January 4, 2021

Gainesville, Florida Zoning Review & Inclusionary Study RFP #: DOSD-210014-GD ADDENDUM NO. 1

Bid Due Date: January 14, 2021, 3:00pm (Local Time)

NOTE: The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary.

1. Any questions regarding this solicitation shall be submitted in writing to the City of Gainesville (CoG) Procurement Division by 3:00pm, (local time), January 7, 2021, 3:00pm local time. Submit questions to: dykemangb@cityofgainesville.org
2. Please find attached:
 - a. A copy of the Cone of Silence period information (Financial Procedures Manual Section 41-424 Prohibition of lobbying in procurement matters) that was discussed.
 - b. A copy of the Pre-Bid Discussion/Information Checklist
3. Following is a review of the Pre-Bid Meeting that was held via Zoom Conference on January 4, 2021, 10:00am Eastern Time:
 - a. City of Gainesville Staff represented by Gayle Dykeman, City of Gainesville Procurement Specialist III and Andrew Persons, Project Manager.
 - b. Gayle Dykeman started the meeting by reviewing important Procurement areas of the solicitation, including the solicitation schedule and submittal due date.
 1. All communication must go through Gayle Dykeman throughout the duration of the solicitation.
 2. All submittals must be entered in DemandStar.com by the due date and time – DemandStar is programmed to reject any bids that are entered after that time. DemandStar is a free tool for vendors to submit bids. DemandStar will automatically close the solicitation at the specified date and time, and the City will not accept any late proposals, regardless of the format presented.
 3. Spoke at length about the rules guiding the Cone of Silence.
 4. Required forms – updated on the Meeting Checklist form attached
 - c. Andrew Persons provided an overview of the intent of the solicitation. He outlined the three key areas of the solicitation: Inclusionary Zoning, Exclusionary Zoning and request for a ‘white paper’ that discusses and analyses alternative zoning solutions that may be used in other agencies throughout the country.



City of Gainesville

Budget and Finance Department
Purchasing Division

4. Following are questions and answers that were discussed in the meeting:

- a. Question:
What is the budget for the consultant?
- Answer:
\$200,000

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 1 by his or her signature below, **and a copy of this Addendum to be returned with proposal.**

CERTIFICATION BY PROPOSER

The undersigned acknowledges receipt of this Addendum No. 1 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER COMPANY NAME: HR&A Advisors, Inc

SIGNATURE: _____


LEGIBLY PRINT NAME: Andrea Batista Schlesinger

DATE: 1/31/2021



ATTACHMENT A
PRE-BID DISCUSSION/INFORMATION CHECKLIST

BID NAME: Gainesville, FL, Zoning Review & Inclusionary Study
BID NUMBER: DOSD-210014-GD **PRE-BID MEETING DATE:** 1/4/2021; 10:00am

_____ Introductions – Gayle Dykeman – Procurement, Andrew Persons, Dept of Sustainable Development

_____ Questions/Answers and topics of discussion addressed at the pre-bid will be available through <https://www.demandstar.com/> in future Addendums. There is no cost to the vendor to use all vendor capabilities when bidding on a City of Gainesville solicitation. You can link to DemandStar through the City’s website or go directly to Demanstar.com <https://network.demandstar.com/for-government/>

_____ Any questions must be in writing
– Email to dykemangb@cityofgainesville.org
– Questions Deadline: Thursday, January 7, 2021, 3:00pm Eastern Time

_____ All communication, contact and/or correspondence must be with dykemangb@cityofgainesville.org or CITY Purchasing Division staff – Cone of Silence
– Bidders who have contact with anyone other than Gayle Dykeman or CITY Purchasing Division staff, (examples of “anyone other than”: Department Staff, City Manager, City elected officials, etc.) will be disqualified.

_____ Bid Due Date: January 14, 2021, 3:00pm Eastern Time

_____ Location to receive bids: Demandstar.com.

_____ Review of Solicitation Schedule

_____ Bonds - YES NO
– If no, bring attention to State Statute of \$200,000

_____ Local Preference – Part 8, 8.1, pg 15

_____ Small and Service Disabled Veteran Business Participation – Part 8, 8.2, pg 15

_____ Living wage – **Does not apply to this Solicitation**

_____ Addenda
– Sign sheet included with each addendum and submit with bid

- _____ **REQUIRED FORMS TO BE SUBMITTED**
____ RFP COVER PAGE
____ DRUG FREE WORK PLACE – EXHIBIT A
____ BIDDER VERIFICATION FORM – EXHIBIT B
____ PRICING RESPONSE
____ REFERENCE FORM – EXHIBIT C
____ BIDDER’S W-9 FORM
____ COPY OF APPLICABLE CURRENT LICENSES
____ SIGNED COPIES OF ALL ADDENDA



200827B
City of Gainesville
Procurement Division
200 E University Avenue, Rm 339
Gainesville, FL 32601
(352) 334-5021(main)

- _____ Minimum Requirements (MUST or SHALL) - Be aware of or could be deemed non-responsive and not considered for award. Part 4, 4.1, pg 8
- _____ Bid Information Form - If not bidding, please complete the form and let us know why you are not bidding.



City of Gainesville

Budget and Finance Department
Purchasing Division

CITY OF GAINESVILLE FINANCIAL SERVICES PROCEDURES MANUAL

41-424 Prohibition of lobbying in procurement matters

Except as expressly set forth in Resolution 170116, Section 9, during the Cone of Silence as defined herein no person may lobby, on behalf of a competing party in a particular procurement process, City Officials or employees, except the Procurement Division or the procurement designated staff contact person. Violation of this provision shall result in disqualification of the party on whose behalf the lobbying occurred.

Cone of Silence period means the period between the issue date which allows for immediate submittals to the City of Gainesville Procurement Division in response to an invitation to bid, or a request for proposal, or qualifications, or information, or an invitation to negotiate, as applicable, and the time that City Officials or the Procurement Division, or City Department awards the contract.

Lobbying means when a person seeks to influence or attempt to influence City Officials or employees with respect to a decision of the City, except as authorized by procurement procedures.



City of Gainesville

Budget and Finance Department
Purchasing Division

Addendum Publish Date: January 11, 2021

Gainesville, Florida Zoning Review & Inclusionary Study RFP #: DOSD-210014-GD ADDENDUM NO. 2

Bid Due Date: January 14, 2021, 3:00pm (Local Time)

NOTE: The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary.

1. Please find attached:
 - a. A copy of the Cone of Silence period information (Financial Procedures Manual Section 41-424 Prohibition of lobbying in procurement matters) that was discussed.
2. Following is a question that was received by the Questions deadline:

Question:

In terms of the scope of the project, is the City looking for a consultant to simply provide a study, recommendations, and implementable policies and procedures for an IZ policy for the City to then take over? Or is the City looking for a consultant to see the IZ policy through to completion?

For example, if the City is seeking a consultant to work on the IZ policy to completion by drafting all the policies and procedures related to IZ (ordinance, deed restrictions, internal policies, etc.) that would be a longer time frame than simply providing recommendations given that a codified IZ policy would surely need to go through the community engagement process which would extend the time frame of project completion.

Answer:

The City expects the final work products from the consultant to include a comprehensive market study for the Gainesville housing market informing implementable recommendations that the consultant would then turn into draft policies and procedures. The consultant and City staff would work collaboratively in bringing the program through the legislative adoption process.



City of Gainesville

Budget and Finance Department
Purchasing Division

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 2 by his or her signature below, **and a copy of this Addendum to be returned with proposal.**

CERTIFICATION BY PROPOSER

The undersigned acknowledges receipt of this Addendum No. 2 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER COMPANY NAME: HR&A Advisors, Inc

SIGNATURE: _____


LEGIBLY PRINT NAME: Andrea Batista Schlesinger

DATE: 1/13/2021



City of Gainesville

Budget and Finance Department
Purchasing Division

CITY OF GAINESVILLE FINANCIAL SERVICES PROCEDURES MANUAL

41-424 Prohibition of lobbying in procurement matters

Except as expressly set forth in Resolution 170116, Section 9, during the Cone of Silence as defined herein no person may lobby, on behalf of a competing party in a particular procurement process, City Officials or employees, except the Procurement Division or the procurement designated staff contact person. Violation of this provision shall result in disqualification of the party on whose behalf the lobbying occurred.

Cone of Silence period means the period between the issue date which allows for immediate submittals to the City of Gainesville Procurement Division in response to an invitation to bid, or a request for proposal, or qualifications, or information, or an invitation to negotiate, as applicable, and the time that City Officials or the Procurement Division, or City Department awards the contract.

Lobbying means when a person seeks to influence or attempt to influence City Officials or employees with respect to a decision of the City, except as authorized by procurement procedures.

State of Florida



Department of State

I certify from the records of this office that HR&A ADVISORS, INC., is a corporation organized under the laws of New York, authorized to transact business in the State of Florida, qualified on August 30, 2019.

The document number of this corporation is F19000004117.

I further certify that said corporation has paid all fees due this office through December 31, 2019, and its status is active.

I further certify that said corporation has not filed a Certificate of Withdrawal.

Given under my hand and the
Great Seal of the State of Florida
at Tallahassee, the Capital, this the
Ninth day of September, 2019



CR2E022 (01-11)

Handwritten signature of Laurel M. Lee in black ink.

Laurel M. Lee

Secretary of State