City of Jacksonville, Florida

Lenny Curry, Mayor

Department of Public Works
Engineering & Construction Management Division
214 N. Hogan Street, 10th Floor
Jacksonville, FL 32202
(904) 255-8762
www.coj.net

ONE CITY. ONE JACKSONVILLE.

October 1, 2019

TO: Gregory W. Pease, Chairman
Professional Services Evaluation Committee

THRU: John P. Pappas, P.E.
Director

FROM: William J. Joyce, P.E.
Director of Operations

Noah Ray
Emergency Preparedness Supervisor

SUBJECT: P-22-19 Professional Grant Services for Acquisition & Demolition of Flood Prone Structures in the COJ

The Engineering Division has negotiated with the consultant selected for Professional Grant Services for Acquisition & Demolition of Flood Prone Structures in the COJ resulting in the Scope of Services, Exhibit A and Contract Rate Schedules, Exhibit B, attached. The City's JSEB program is not applicable to this project. Instructions were provided for required Federal Affirmative Steps were included in the RFP.

Accordingly, this is to recommend that the City of Jacksonville enter into a contract with Wheeler Emergency Management Consulting, LLC, for Professional Grant Services for Acquisition & Demolition of Flood Prone Structures in the COJ, that includes the attached Scope of Services identified as Exhibit "A" and Rate Schedules, identified as Exhibit "B". Each project performed under this agreement shall be authorized by an individual Purchase Order with a not-to-exceed cost applicable thereto. The maximum indebtedness of the City pursuant to this agreement is $1,000,000.00. The initial Period of Service will be for two (2) years with the option to extend such contract for two (2) additional two (2) year periods upon satisfactory performance by the Consultant. Initial contract expiration date shall be 2 years from date of contract execution. All other terms and conditions are as provided in the RFP and the City's standard contract language.

JPP/lw

Attachments: Exhibits A & B

cc: Lori West, PW Contract Specialist, Engineering and Construction Management
Dinah Coleman-Mason, Public Works Administration Manager- Special Projects

Section 4
Description of Services and Deliverables

The City of Jacksonville is seeking a Request for Proposal (RFP) for a qualified Grant Management Consultant ("Consultant") firm to provide counseling and relocation services due to disposition and/or demolition of a total of 42 properties in the Reed Subdivision/South Shores Road and throughout the City of Jacksonville. The properties are broken down in three groups, Group A (17 properties), Group B (21 properties), Group C (4 properties). The properties will be acquired in a phased approach, with the properties included in Group A the first to be acquired and demolished. The successful Consultant will be responsible for abiding by the Emergency Operations Center (EOC) guidelines and providing all tools and materials used in performing the tasks under this contract. EOC will provide an office for the Grant management consultant team, for interviewing individuals, a telephone, a computer and access to the internet.

The Grant Management Consultant responsibilities include but are not limited to; preparation of and administrative review of grant proposals with supporting documentation to identify and resolve compliance issues related to "Florida Department of Emergency Management (FDEM) and other federal guidelines from the U.S. Housing and Urban Development (HUD) and Federal Emergency Management Agency (FEMA). Interprets pre-award and post-award guidelines to staff and supporting contractors in accordance with funder guidelines, federal register requirements, and 200 CFR-Uniform Administrative Requirements. Plan, coordinate, and implement public meetings; review appraisals for compliance with Uniform Standards for Professional Appraisal Practices and grant requirements, Procure and oversee title company services; Procure and Oversee Appraisal Services; Review title searches and title insurance commitments; Prepare the Determination of Compensation and the Voluntary Transaction Agreement, Procure and Oversee Construction Services, Procure and oversee Environmental Services, Provide Quarterly Reports to FDEM, Maintain property case files, Oversee and coordinate closings/settlements, Prepare deeds, deed restrictions and coordinate with the Chief of Real Estate and the Office of General Counsel.

The Grant Management Consultant will be responsible for providing a relocation specialist who will provide case management-like support to households and individuals during the relocation process and will serve as the primary point of contact for administration of the grant, households on all relocation-related issues, and coordinating with other supportive service providers as needed. The consultant will continue to meet with residents on an ongoing, as-needed basis.
The Grant Management consultant must ensure that the relocation specialist selected has at a minimum, maintain an expertise in, and strong working knowledge of, the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, as amended ("URA") and underlying rules and regulations as well the relocation plan and benefits administered by the Housing and Community Development Act of 1974, as amended, in order to provide high-quality service to displaced households.

The Grant Management Consultant team must be able to provide project management by directing the activities associated with the grants and acquisition of forty two properties, and other publically funded capital projects as well as provide relocation services and describe the organizations strategies and techniques for delivering and integrating these basic services in the proposal.

a. **Project Coordination:** The Grant Management Consultant will serve as the primary point of contact for acquisition, demolition, and relocation matters among COJ, and service providers and displaced households.

b. **Grant Management:** The Grant Management Consultant will provide general oversight of the project. This will include procurement and oversight of contractors to perform selected services, which may include real property appraisals, boundary surveys, title services, and demolition work. Grant Management will consist of the following twelve tasks, at a minimum, to ensure completion of the scope of work of this projects:

TASK 1 - Procure Title Company Services: The Consultant will procure the services of a Title Company that is licensed to do business in the State of Florida and is properly qualified to provide a Commitment to Insure, to provide Escrow and Closing Agent Services, and to issue a Title Insurance Policy from a nationally recognized insurer to insure the purchaser as having a good and marketable title to the property to be acquired. The services of the Title Company will be paid through the Grant.

TASK 2 - Procure Contract for Appraisal Services: The Consultant will procure the services of a Certified Residential Real Estate Appraiser who is properly qualified and registered in the State of Florida to provide an estimate of the Fair Market Value of each property to be acquired. The Contractor will consult with the Community to prepare instructions for the appraisals, including the date of valuation (e.g., immediately preceding the flood that triggered eligibility for each property). The services of the Certified Residential Real Estate Appraiser will be paid through the Grant.

TASK 3 - Review and Oversight of Title Company Activities: The Consultant will ensure that the Title Company activities are performed in a timely manner and in accordance with the terms of the contract. The consultant will review Title Search and Title Insurance Commitments to ensure that they meet the requirements of the contract. If problems AA are encountered, the consultant will seek resolution from the Title Company.

TASK 4 - Review of Appraisal: The Consultant will review the appraisals for compliance with the Uniform Standards for Professional Appraisal Practices (USPAP) and Grant agency requirements. The Appraiser's estimate of value should be well-documented and supported by the best comparable sale data available. The Consultant will prepare an appraisal review form for each appraisal. Errors, omissions and unsupported conclusions will be brought to the attention of the Appraiser and the report will be revised as needed to meet the Consultant's requirements. An approved estimate of value will be prepared. Should a property owner later challenge the Determination of Compensation and provide his or her own appraisal, the Consultant will review the owner's appraisal and a revised Offer to Sell will be prepared, as appropriate.

TASK 5 - Development of Data to Determine Compensation The Consultant will review information obtained by the Community from appropriate federal and State agencies and a Duplication of Benefits assessment will be prepared for each property owner to recommend of the amount of compensation for each property. The Consultant will analyze the appraisal and/or community information to extract the needed information for the preparation of the Statement of Determination of Compensation and Offer to Sell Real Property. Duplication of Benefits information will be reviewed and proper deductions from value will be made in accordance with standard policies and procedures of the Grant agency.

TASK 6 - Preparation of Determination of Compensation and Offer to Sell Real Property: Using the data developed or obtained in Task 5, the Consultant will prepare the following documents: (1) Letter to each property owner explaining the acquisition process and their rights and options, to be signed by the Community official; (2) a Statement of Determination of Compensation for each property to be signed by the Community official, and; (3) an Offer to Sell Real Property agreement for each property.

TASK 7 - Negotiation: The Consultant will scheduled a personal meeting with each property owner, at which time the letter explaining the acquisition process and the owner's rights and options will be reviewed and the Statement of Determination of Compensation and Offer to Sell Real Property will be presented and explained. If Duplication of Benefits deductions are made and the property owner has documentation to support a revision to the deductions or to support a reimbursement, appropriate adjustments to the appropriate documents will be made. The meetings will be conducted in facilities provided by the City of Jacksonville.

TASK 8 - Preparation of Deeds: The Consultant will prepare a Deed for each property in a form that meets the requirements of the FEMA Section 404 program (and additional requirements if specified by the City of Jacksonville) and that will be suitable for recording with the Recorder of Deeds in Duval

County. This Deed will recite the true consideration to be paid, will identify the interest in the land to be acquired, and will include the appropriate deed restrictions.

TASK 9 - Oversight and Coordination of Settlements: The Title Company will be responsible for scheduling a closing session with each property owner and for the preparation of all documents necessary for closing. The Consultant will monitor these activities to ensure that they are performed in a timely manner and that all matters are properly coordinated. A list will be prepared and provided to the City of Jacksonville prior to each closing to identify the amount needed for disbursement by the Title Company at the closing. The list will identity each property by parcel number, owner name, address of property, and amount of compensation. The City of Jacksonville will be advised to deposit the needed funds in the Title Company escrow prior to closing.

TASK 10 - Preparation and Maintenance of Hard Copy Case Files: A hard copy case file for each property purchased will be prepared and submitted to the City of Jacksonville upon completion of the acquisition project. This file will contain, at a minimum, copies of: the application package from the property owner; the appraisal; all correspondence to the property owner and from the property owner; the Determination of Compensation; the Offer to Sell and any revisions thereto; the final title insurance policy; and the recorded Deed. Notes regarding property owner meetings and various discussions will be included, as appropriate.

TASK 11 - Determine Relocation Benefits for Eligible Tenants: The Consultant shall provide a Relocation Specialist, will review eligibility of tenants for relocation benefits under the Uniform Property Acquisition and Relocation Assistance Act (URA) and FEMA Guidelines. The Relocation Specialist will obtain information from each tenant and recommend benefit amounts to be paid. These benefits may include rental differential, moving costs and miscellaneous cost payments. The Relocation Specialist will prepare an Agreement to be executed by each eligible tenant, explain the benefits, and oversee the payment of benefits. The services of the Relocation Specialist will be paid through the Grant. See Section 4.C below for additional details regarding the Relocation Specialist.

TASK 12 - Assist the City of Jacksonville with procurement of contracts for Environmental Survey, Hazardous Material abatement, and Demolition Services by preparing all design and construction/ demolition documents for bidding. Procured Contractor services to be provided by a State-Certified or Registered Contractor, licensed by the State of Florida. Services will be procured by Competitive Bids consistent with the City of Jacksonville Procurement policy and subject to 2 CFR § 200.318 as it pertains to procurement of services. A pre-demolition asbestos survey is required for any property to be demolished through the Grant. If the presence of asbestos or other hazardous/toxic materials is discovered, abatement services must be performed. The Contractor selected to perform Environmental Surveys is responsible for notification of the presence of Regulated Asbestos-Containing Materials by submission of the "Notice of Asbestos Renovation or Demolition" to the Florida Department of Environmental Protection in accordance with 376.60, F.S., and the renovation or demolition notice requirements of the National Emission Standards for Hazardous Air Pollutants, 40 CFR Part 61, Subpart M, as embodied in Rule 62-257, F.A.C.

c. **Relocation Specialist to provide:**

Intake and Assessment:

- Conduct intake assessments/resident surveys on households prior to relocation.
- Prepare Household Relocation Plans for each household addressed any special needs, recommend services and service providers; routinely review and track the status of households as they transition to new environments.

Supportive Services and Referrals

- Assist households in implementing the goals of their Household Relocation Plans before, during and after relocation.
- Monitor progress of Household Relocation Plans and devise strategies for assisting residents in meeting these milestones
- Coordinate with the appropriate agency to assist residents in obtaining fair housing and housing choice counseling
- Coordinate with appropriate agency as needed to refer residents to specific services
- Assist residents in understanding relocation information and associated benefits and entitlements, encourage them to take advantage of relocation services, and accompany residents to specific meetings, as needed
- Assistance in making arrangements for the physical moves, including the connection and disconnection of utilities, notification of the post office, and in cases of elderly and disabled households, providing for assistance in packing and unpacking, provision of packing materials.
- Provide other direct assistance, advice and recommendations as requested by COJ.

d. Communication:

- Hold regular meetings as needed to keep residents completely informed of proposed activities and to actively solicit their views and opinions.
- Conduct and/or coordinate the provision of general informational workshops on such topics as homeownership, budgeting and housing search techniques.
- Provide other communication as requested by COJ.
- The following notices will be utilized during this process:
  1. "General Information Notice": COJ has delivered General Information Notice to all families occupying units in South Shores. The notice informed the residents of their rights for assistance.
  2. "Notice of Eligibility for Relocation Assistance": The Authority has mailed the "Notice of Eligibility/Non-Eligibility for Relocation Assistance to all families occupying units in South Shores
  3. "90- Day Notice to Vacate": Each resident will be provided with a 90 day advance written notice of the earliest date by which he or she may be required to move. The notice may also incorporate three comparable units for resident consideration.

e. Tracking:

The Consultant will design and maintain a system, organized by seniority (defined as Head of Household leaseholders at South Shores) and bedroom size requirements, for tracking the status of each relocation supportive services referrals, the utilization of such services, and overall progress. This list will be updated daily and will eventually create the waitlist to prioritize returning residents. It will include:

- Names and ages of the head of household and all household members
- Unit size required
- Date of relocation
- Interim contact information
- Special needs
- Permanent housing preference
- Relocation assistance and benefits received
- Current status
- Record of all notices sent to the household
- All attempts to contact household
- Record of workshops attended

- Impediments and solutions
- Provide other tracking as requested by COJ.

The Relocation Specialist will maintain records on all activities and related costs, including tracking of all families as they move.

The Grant Management Consultant will provide monthly reports to EOC/COJ, in an electronic format to be reviewed and approved.

f) Administrative Requirements

- The Grant Management Consultant along with the Relocation Specialist will work cooperatively and constructively with Emergency Operations Center (EOC), City of Jacksonville (COJ) and other key stakeholders.
- To ensure consistency and accuracy of all communications, the Grant Management Consultant will be required to provide initial training and orientation for their staff to the workings of the COJ/EOC, and its philosophy regarding the successful relocation of its residents.
- The Grant Management Consultant will meet biweekly with EOC/COJ to ensure that milestones are met and that appropriate procedures are being followed.
- The Grant Management Consultant will enter into a detailed performance-based contract that will make payment for services contingent on the satisfactory delivery of those services, EOC/COJ will work with the Grant Management Consultant to identify the specific outcome measurements to be incorporated in the contract and payment schedule.
- The Grant Management Consultant shall adhere to all reporting and administrative requirements as required by EOC/COJ, the U.S. Department of Housing and Urban Development, the State of Florida and all other pertinent organizations and institutions.
- The Grant Management Consultant will maintain the confidentiality of all information regarding displaced households and individual household members.
- The Grant Management Consultant will secure signed release of information forms before divulging such information, and will do so only where necessary to secure required services for the displaced person(s). No household information shall be released to any party without prior written approval by EOC/COJ.
- The Grant Management Consultant's staff will conduct reviews and/or audits of client files, intake and assessment forms, Household Action Plan development, referrals, and follow-up tracking on a regular basis and document findings for review by EOC/COJ. Where it is observed that services are not in compliance with contract requirements or best practices, the Grant Management Consultant will institute staff training and issue written directives to effectively address problem areas.
- To insure quality customer service, the Grant Management Consultant will perform periodic audits to monitor adherence to regulations, policies, and best practices.
- Client files will be maintained in an orderly, confidential and accessible manner, and must be available to authorized EOC/COJ staff for the purposes of monitoring and auditing.
- The Grant Management Consultant will be required to develop a comprehensive electronic tracking and reporting system, to be reviewed and approved by EOC/COJ, for the purpose of monitoring monthly performance of the Grant Management Consultant and service providers. In addition to these formal reporting requirements, the Grant Management Consultant shall be responsible for immediately reporting (within a 24 hour period) to EOC/COJ any special issues orconcerns

(End of Section 4 – Remainder of page intentionally left blank)

EXHIBIT B

Form 1 - SCHEDULE OF PROPOSED PRICES/RATES

NAME OF CONSULTANT: Wheeler Emergency Management Consulting, LLC

Proposal Number: P-22-19

1. Average hourly direct labor rates (without Fringe Benefits)

Principal	$ 75 hr.
Project Manager	$ 60 hr.
Grant Manager	$ 50 hr.
Relocation Specialist	$ 45 hr.
Data Manager	$ 50 hr.

2. Total Overhead Rate (to be applied to Direct Labor:) 150 %

3. Profit Rate (to be applied to Direct Labor plus Overhead) 10 %

4. Other Direct Project Costs per Unit (please specify):

5. Estimated percentage of total fee to be performed by subconsultants 10 %

6. Please provide any other relevant rates that may apply to this project including average direct hourly labor rates for other categories of proposed personnel.

EXHIBIT B

Form 1 – SCHEDULE OF PROPOSED PRICES/RATES

NAME OF CONSULTANT: Invictus Management, LLC

Proposal Number: P-22-19

1. Average hourly direct labor rates (without Fringe Benefits)

Principal	$_____hr.
Project Manager	$ 60 hr.
Grant Manager	$ 50 hr.
Relocation Specialist	$_____hr.
Data Manager	$_____hr.

2. Total Overhead Rate (to be applied to Direct Labor:) 150 %

3. Profit Rate (to be applied to Direct Labor plus Overhead) 10 %

4. Other Direct Project Costs per Unit (please specify):

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5. Estimated percentage of total fee to be performed by subconsultants 0 %

6. Please provide any other relevant rates that may apply to this project including average direct hourly labor rates for other categories of proposed personnel.

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