

REQUEST FOR PROPOSALS (RFP)

Issue Date: September 23, 2009

RFP#: FMFADA RFP 091409

Title: Interim Deputy Director of Real Estate

Issuing Agency: Fort Monroe Federal Area Development Authority (FMFADA)

Where work will be performed: Fort Monroe, Virginia

Period of Contract: Date of Award through June 30, 2010

Proposals will be received until: October 23, 2009 4:00 PM

All inquiries for information should be directed to: Ms. Conover Hunt
Deputy Director, FMFADA
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Email: chunt@FMFADA.com

In compliance with this Request for Proposal and all conditions imposed herein, the undersigned offers and agrees to furnish the services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiations.

Name: _____

Title: _____

Company Name: _____

Address: _____

Zip Code: _____

Date: _____

Telephone: _____

Fax: _____

Email: _____

Web Address: _____

FEI/FIN No.: _____

I. PURPOSE:

The purpose of this Request for Proposals (RFP) is to solicit proposals to establish a contract with the Fort Monroe Federal Area Development Authority (FMFADA), the Owner, for individual consulting services at FMFADA in the position of Interim Deputy Director of Real Estate. Fort Monroe, Virginia, is a National Historic Landmark District located in Hampton, Virginia, and slated for BRAC closure by the U.S. Army in 2011. The FMFADA anticipates funding in FY 2011 to establish a full time, salaried Deputy Director of Real Estate position. The selected Offeror will be eligible to apply.

II. BACKGROUND:

FMFADA

The Fort Monroe Federal Area Development Authority (FMFADA), created by Act of the Virginia General Assembly in 2007, is charged with developing and implementing a reuse plan for Fort Monroe. The FMFADA is a political subdivision of the Commonwealth of Virginia. Led by an 18-member appointed Board of Commissioners, the FMFADA serves with the Department of Defense as the Local Redevelopment Authority (LRA) for the scheduled closure in 2011. The Owner has engaged the services of national consultants in the areas of town planning, BRAC law, environmental engineering, civil engineering, historic preservation architectural and planning services, commercial and retail economic analysis, tourism, and public relations/marketing to assist in the reuse planning. The concept reuse plan approved in August, 2008 contains the vision for Fort Monroe. The FMFADA maintains an office at Fort Monroe and works with a small permanent staff assisted by state personnel as needed.

FORT MONROE

Fort Monroe's current boundaries encompass 570 acres, including 110 acres of submerged lands and 85 acres of wetlands, in addition to more than 180 historic structures and features that contribute to the Fort Monroe NHL District, including the namesake stone fort completed in 1834. Fort Monroe was built for coastal defense and housed one of the Army's first field schools of military education, for the artillery.

Originally named Point Comfort by Captain John Smith in 1607, the first fortifications at the point were erected in 1609. Further exploration of the James River and Chesapeake Bay led to the early renaming of Point Comfort as Old Point Comfort, the designation it has held until today. The site currently contains one museum, the Casemate, a part of the Army's TRADOC (Training and Doctrine Command) system of museums. The museum interprets the history of Fort Monroe and Old Point Comfort and includes the cell where former Confederate President Jefferson Davis was imprisoned in 1865. Other noted individuals associated with Fort Monroe include Chief Blackhawk, Edgar Allan Poe, Robert E. Lee, Abraham Lincoln, and Ulysses S. Grant. The fort remained in Union hands throughout the Civil War and was a key staging ground for the Union campaign in Virginia and along the Atlantic.

In 1861, Commanding General Benjamin Butler gave sanctuary to three runaway slaves, declaring them free Contraband of War. The decision earned the site the name Freedom's Fortress and led to the Emancipation Proclamation eighteen months later. Fort Monroe gave sanctuary to more than 10,000 slaves who used the decision to seize their freedom during the war. Efforts to educate this newly freed population led to the founding of Hampton Institute, now Hampton University.

HISTORIC PRESERVATION

The majority of the site was named a National Historic Landmark District in 1960. The Army will undertake further research to expand and update the NHL district prior to its departure in 2011. In addition to immediate LRA activities related to property use, the Authority is a signatory of a Programmatic Agreement (PA) under Section 106 of the National Historic Preservation Act (NHPA). The PA for this action recognizes the US Army's federal undertaking in the closure of Fort Monroe and specifies actions to mitigate the closure's effects on historic properties covered by the NHPA and future requirements in order to avoid, minimize, or mitigate adverse effects.

Fort Monroe is closing September 14, 2011. Provisions of the PA require certain items to be underway or complete prior to that date (completing view shed and cultural landscape studies, hiring a Fort Monroe Historic Preservation Officer, adopting Design Standards, etc.). Responsible parties are identified for each task and performance deadlines are assigned. The Authority will be responsible for completing an interpretive and educational plan. The Authority intends to contract for professional planning services to coordinate a comprehensive planning process for the development of a Long Range Interpretive Master Plan consistent with the model standards adopted by the National Park Service (NPS). The process should include active solicitation of public and community involvement.

There are five key essentials that have driven the FMFADA reuse planning and remain central to all future planning efforts:

1. Respect the site's historic assets
2. Open the site to the public
3. Achieve economic sustainability
4. Create an open space park
5. Allow new development under strict limits.

Given the national significance of the fort, whose construction dates to 1819-1834, and its place in many aspects of American history, including its unique importance in African-American history, as well as military and social history, and the history of Old Point Comfort as a resort, there is strong public interest in interpretive and educational public programs at the property. In addition to heritage tourism potentials, the site offers many outdoor and natural resource-based recreational features. Fort Monroe faces the entrance to the Chesapeake Bay and Hampton Roads Harbor, boasts water on three sides, and has 3.2 miles of waterfront on the Bay, dune beaches, and is home to many birds. Other amenities include access to shallow water suitable for canoeing, sculling, and small boat usage, a 332-slip wet storage marina, and a travel park for recreational vehicles that could be increased in size.

The present operating military base has a beachside former officer's club, a state of the art fitness center, an activity center with lap pool, a regulation basketball court, a craft shop, a bowling alley, tennis courts, a baseball field, and miles of jogging tracks. Given the NHL status of the site, new construction will be strictly limited in amount, height, and design. The historic buildings will be adaptively and creatively reused with some considered for use in organized cultural programs for the public. The identification of buildings for consideration for public programs will be made during the IMP process. Options and phasing recommendations are expected as a part of a critical planning process that takes into account both tourism and economic data. The reuse plan can be viewed on the FMFADA web site, www.fmfada.com.

III. POSITION INFORMATION:

A. Real Estate Policy

Under existing deeds, title to much of the land and most of the existing buildings will automatically revert to the Commonwealth when the Army mission ceases in 2011. The FMFADA will enter into an EDC with the Army to transfer all federal surplus property to the Commonwealth of Virginia, with the FMFADA serving as the manager of these assets. This action will give total control of the site to the Commonwealth. After an initial period of interim short term leases, the FMFADA will enter into long term prepaid leases for the real property at the site. The leases will be of sufficient duration to ensure the generation of real estate taxes to the City of Hampton to offset the costs of providing municipal services, and will also allow for the capture of federal and state income tax credits for the rehabilitation of historic properties. The combined federal and state total for Virginia is 45%. Interim leasing will begin during the first quarter of 2010. The plan is to rely on private investment for tax credits, and to prioritize actions to get the historic buildings occupied rapidly to avoid mothballing if possible.

B. FMFADA Real Estate Department:

The FMFADA is beginning to establish a Department of Real Estate. The department is envisioned to be an important component in FMFADA's stated goal of economic sustainability. The FMFADA will be generating income from the operation, management, and development of real estate on the site as established in the provisions of approved Reuse Plan. Real Estate will be one of the core "businesses" of the FMFADA organization and will coordinate with other departments at FMFADA, various public stakeholders, and the business community. The real estate department will be charged with all aspects of producing and maintaining streams of revenue from the Fort's real property assets. This will include, but will not be limited to:

- Tenant recruitment and relations
- Lease negotiation
- Marketing of real property
- Property and building maintenance
- Renovation/rehabilitation
- Property management
- Engineering
- Business development (with development partners/operators)
- Planning, zoning, and entitlements

- Infrastructure and utilities management
- Construction and construction management
- Public participation/stakeholder outreach

Plans are underway to organize a national search for one or more real estate management/development partners. To this end, multiple RFP solicitations are currently out in the marketplace at this time. These partners will work with the FMFADA to adaptively reuse the 2.4 million square feet of space, of which nearly one million are historic structures, and engage in limited new development in areas, while preserving the historic and natural resources, promoting public access, recreational enjoyment and educational enrichment of this national treasure. The fort is subject to a strict Programmatic Agreement which clarifies the nature and extent of development. The FMFADA will promote the use of federal and state investment tax credits for private rehabilitation of the vast majority of the historic inventory.

In addition to the Interim Deputy Director of Real Estate, the FMFADA is releasing an RFP to secure the services of a real estate management leasing firm that will take on responsibility for coordinating short term leasing for certain interim leases that will be available by February or March, 2010. The bulk of these interim leases will be in the 118 Wherry apartments on the site. The FMFADA will perform minor upgrades to these apartments as they become available, before releasing them. Some will be converted to seasonal weekly rentals to take advantage of their location on the Chesapeake Bay and its beaches.

C. Position Background:

The FMFADA is looking to contract with an individual as a consultant to fill the role of Interim Deputy Director of Real Estate. During the period ending no later than June 30, 2010, this individual will assist with the ongoing real estate activities as well as support the establishment of the Real Estate Department of the FMFADA. The selected individual will assist the Authority in its transition from planning to implementation of the Reuse Plan for the site.

The FMFADA seeks a highly-qualified and experienced real estate professional to assist in establishing the Real Estate Department. The consultant will report directly to the Executive Director. He or she will be responsible for coordinating the real estate activities of the FMFADA as a member of the senior staff team and will also work with the outside consultants and assist in the communication of the real estate program to the FMFADA Board, the City of Hampton, the Commonwealth of Virginia, various community stakeholders and industry professionals.

D. Position Responsibilities:

The FMFADA will manage Fort Monroe with a small permanent staff that will carry out its real estate activities through a combination of public-private partnerships and independent management/development activity. The Interim Deputy Director of the Real Estate Department will work within the parameters described in Sections A and B. The following list provides examples of the potential activities in which the selected Offeror may be engaged:

1. Assist with the solicitation and selection of various real estate operations and shared service providers and partners.
2. Coordinate with consultants involved in real estate and manage these relationships; particularly the ongoing property management contractor and its on-site staff.
3. Assist in representing the interests of the FMFADA in structuring and negotiating agreements with

prospective and existing tenants and/or work with third-party property management contractors toward this end.

4. Manage relationships between FMFADA and selected developer(s), operators, and service providers and make recommendations in the design and implementation of an ongoing oversight program.
5. Serve as the primary interface with the Army on the interim leasing program, land conveyance, and on the ongoing environmental remediation at Ft. Monroe.
6. Work closely with the Executive Director and provide regular updates to the Board of FMFADA.
7. Maintain regular communication with the Executive and senior FMADA staff in order to keep them apprised of any and all real estate issues.
8. Communicate the real estate implementation strategy for the Reuse Plan to the FMFADA Board, Virginia government, the local community, and other key stakeholders.
9. Interface with staff and stakeholders related to the implications the proposed real estate activities will have on the execution and administration of the Programmatic Agreement for historic preservation as well as planned public programs.
10. Assist in the preparation of the FMFADA's annual Fiscal Year 2011 real estate budget including staffing, contract support, infrastructure, and operating needs.
11. Assist in the solicitation, selection, negotiation and oversight of development and operating partners to ensure that the goals and objectives of the FMFADA reuse plan are achieved.

E. Position Term & Compensation:

The initial term of the Interim Director Consultant is anticipated to be through June 30, 2010. The total funds available for these services are \$50,000. The selected Offeror and the FMFADA will negotiate the level of expenses that can be reimbursed as part of the contract. The consultant will be expected to maintain an office at the FMFADA headquarters and work there on a regular basis. The FMFADA and the selected Offeror will agree on a monthly payment schedule.

IV. APPLICANT QUALIFICATIONS:

1. Minimum of ten years experience in the field of real estate development and/or operations, preferably with large-scale redevelopment projects and public-private partnerships. Extensive knowledge and experience of historic preservation management, state and local government, BRAC, and the Department of Army is a plus.
2. Demonstrated skill in the principles and practices of public relations and marketing. This includes excellent oral and written communication skills. The position requires the ability to establish and maintain effective working relationships with those contacted during the course of the assignment, primarily local business, financial institutions, real estate industry professionals, public officials, community groups and organizations, and the general public.
3. The ability to plan, to organize, manage and implement all aspects of the FMFADA's real estate activities. Qualified candidates must have the demonstrated ability to manage multidisciplinary teams, including multiple third party consultants, analyze situations, identify alternative solutions and assess risk to the FMFADA.

4. Minimum of a Bachelor's Degree in business, finance, real estate, urban planning, or related field. Master's degree preferred. Must be able to work on-site on an agreed upon basis and be able to participate in scheduled on-site as well as ad-hoc meetings.

V. APPLICANT SUBMISSION REQUIREMENTS:

1. Signed copy of this proposal's cover sheet.
2. Resume and cover letter. Resume will include detailed description of past professional and educational experience. For professional experience, list all titles held and dates held. For educational background, list names of all relevant institutions, dates attended, and degrees awarded (with listing of concentrations, if applicable). Cover letter will demonstrate a keen understanding of the position and the FMFADA organization. The strongest applicants will be able to clearly communicate relevant past professional experience and how it relates to the job responsibilities enumerated herein.
3. Three references are to be included with submission. For each reference, candidate is required to provide complete contact and background information for each reference (full name, title, and organization, relationship to candidate [e.g., Manager, Professor, etc.], physical address, email address, and phone number).
4. Monthly rate for services as well as a breakdown of anticipated expenses.
5. All information requested in Appendix A.

All information requested in this solicitation must be submitted. Failure to submit all information requested may result in the purchasing agency requiring prompt submission of missing information, a lowered evaluation, and/or elimination of consideration of the proposal.

VI. EVALUATION FACTORS AND SCORING:

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| 1. Understanding of the assignment | 0-40 points |
| 2. Training, experience and references | 0-40 points |
| 3. Monthly labor rate and anticipated expenses | <u>0-20 point</u> |
| Total | 100 points |