

**Fort Pierce Redevelopment Agency**

**Request for Proposal**

**No. 2015-027**

**Oaks at Moore's Creek Redevelopment  
Phase II**

**Stuart & Shelby Development**

**205 George Bush Blvd**

**Delray Beach, FL 33444**

**561-637-7902**

**Contact: Chuck Halberg**

**561-809-1266 (cell)**

**Proposal dated: January 22, 2015, 3pm**

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**SECTION 1**

**LETTER OF TRANSMITTAL**

# STUART & SHELBY DEVELOPMENT- GENERAL CONTRACTORS

## LETTER OF TRANSMITTAL Fort Pierce Redevelopment Agency RFP No. 2015-027

January 22, 2015

City of Fort Pierce  
Attn: Purchasing Department  
100 N. US 1  
Fort Pierce, FL 34950

Re: RFP 2015-027 / Oaks at Moore's Creek Redevelopment Phase II

Stuart & Shelby Development is an experienced homebuilder and developer whose partners have developed and built over 5,000 single-family homes since 1980 including both market-rate and affordable homes. The Stuart & Shelby Development team includes seasoned professionals with experience in funding, design, development, and homebuyer recruitment/home sales of projects for affordable housing, as well as market rate projects and those for Community Redevelopment Agencies.

Stuart & Shelby Development has reviewed the RFP in its entirety and has a full understanding of the scope. We have conducted preliminary due diligence on development regulations, available infrastructure, and potential market for sale of units. In addition, we have considered development density and scale for compatibility with the surrounding neighborhood, and prepared a preliminary development plan and approach to address the City and Redevelopment Agency's request.

Based on the preliminary due diligence, Stuart & Shelby Development has concluded that to implement this project significant subsidy will be required and formation of a public-private-partnership will be necessary. We are committed to serving as the development partner responsible for all design, permitting, construction, homebuyer recruitment, and will assist with securing funding as needed. The City and Redevelopment Agency will need to contribute the value of the land to the project and fund construction of infrastructure and homes, assist with expedited permitting of infrastructure and building permits, and provide soft-second mortgages as well as downpayment assistance to income-qualified homebuyers.

We believe we are the best-qualified company with whom to partner and to perform this work based on our company's experience in the South Florida construction industry as well as recent experience constructing affordable units with the Hallandale Beach CRA, the Lake Worth CRA and the Delray Beach Community Land Trust. We thank you for your consideration.



Charles Halberg, President  
Delray Beach Business Person of the Year 2010/2011  
Delray Beach Business of the Year 2013/2014

## SECTION 2

# QUALIFICATIONS & EXPERIENCE

# STUART & SHELBY DEVELOPMENT- GENERAL CONTRACTORS

## SECTION 2. QUALIFICATIONS AND EXPERIENCE

- 1. Name and address of respondent, including all team members, if any, including personnel who will be involved and the business address of key individuals.**

### Respondent

Stuart & Shelby Development, Inc.  
205 George Bush Boulevard  
Delray Beach, FL 33444

Chuck Halberg, President  
Chuck McGovern, Project manager for horizontal and vertical construction  
Steve Weiss, Project superintendent  
William Neville, Purchasing and Contracting  
Patty Eldredge- Office Manager

### Team Members

Corey W. O’Gorman, AICP  
PLACE Planning & Design, Inc.  
700 US One, Ste I  
North Palm Beach, FL 33408

Chester Bishop, Surealty Title / Housing Federation of America  
2400 N. University Avenue, Ste 200  
Pembroke Pines, FL 33024

Maurice Menasche, AIA, LEED AP  
Architecture Planning Design  
12555 Orange Drive, Ste 122  
Davie, FL 33330

Jeffrey T. Schnars, PE  
Schnars Engineering Corporation  
949A Clint Moore Road  
Boca Raton, FL 33487

- 2. Nature of respondent’s business organization including state of incorporation or formation of partnership, if any.**

Stuart & Shelby Development, Inc. is a Corporation incorporated under the laws of the State of Florida.

- 3. Respondent’s organizational structure.**

Stuart & Shelby Development, Inc., will lead the development team, will be responsible for all development activities, will be partner and point of contact with the City and Redevelopment Agency, and will be responsible for contracting with all subconsultants and subcontractors for completion of the project.

**205 George Bush Blvd • Delray Beach, FL 33444**

Phone 561-637-7902 • Fax 561-637-7904 • [www.stuartandshelby.com](http://www.stuartandshelby.com)

# STUART & SHELBY DEVELOPMENT- GENERAL CONTRACTORS

## 4. Respondent's professional qualifications and experience in development, financing, and management of comparable projects.

The partners of Stuart & Shelby Development have over 75 years experience constructing single-family homes in the South Florida market. The firm has been providing services to government entities for the past 7 years but our partners have been involved with government agencies for over 16 years. The partners of Stuart & Shelby have developed and constructed over 5,000 single-family homes in South Florida since 1980 having been in upper management with some of South Florida's largest builders. Chuck Halberg, President of Stuart & Shelby Development has been a Florida State Certified licensed GC since 1986 and personally has been involved in over 2500 single-family home with out ever being involved in any litigation.

Stuart & Shelby currently employees 7 full-time workers, 1 part-time employee and 1 contract worker. A project of this size will require 1 part-time project manager, 1 full-time superintendent, 3 part-time support staff members and 1 contract staff member.

### Team members and experience includes:

**Corey W. O'Gorman**, AICP, PLACE Planning & Design, will assist with affordable housing development financing and grant administration; project planning, permitting and coordination on redevelopment agency issues. Mr. O'Gorman's career spans over thirty years of public and private sector experience in community planning and zoning, real estate development, redevelopment and project management.

He has extensive experience with the real estate development process applicable to private, public and non-profit charitable organizations, including: project management from concept through construction, affordable housing projects (including grant writing and administration); due diligence studies; critical path scheduling; rezonings, variances, and permitting; redevelopment planning, implementation and administration; and developer negotiations including agreements for disposition and development of public land.

**Chester A. Bishop** is the founder, president and CEO of SuRealty Title, Inc. and Attorney's Realty Title, Inc. He also serves as the COO of Housing Foundation of America, Inc. a not-for-profit 501(c)3 organization.

But more than that, Mr. Bishop has been a positive force and an advocate in South Florida for affordable housing and for first-time home ownership. He and his firms have conducted numerous home ownership workshops and seminars on local, state and federal housing grant programs. Through his leadership thousands of homeowners have been given assistance that saved their homes from foreclosure.

Mr. Bishop has provided leadership and support services on numerous housing boards and committees. Mr. Bishop is a former President of the South Florida Board of Realtists. He served on the board of Housing Opportunities Project for Excellence Corporation (**HOPE**), a private fair housing, not-for-profit, 501©3 corporation established in 1988. It is one of three in Florida dedicated to eliminating housing discrimination and promoting fair housing.

205 George Bush Blvd • Delray Beach, FL 33444

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# STUART & SHELBY DEVELOPMENT- GENERAL CONTRACTORS

Mr. Bishop also served on the Board of the Universal Truth Community Development Corporation (UTCDC), which is a Florida community and faith based non-profit corporation and an independent affiliate of the Universal Truth Center for Better Living.

Mr. Bishop served two terms as president of the Broward Housing and Community Development Task Force. Mr. Bishop financially supports many charities. He is a charter member of the Kiwanis club of Lauderdale Lakes/West Sunrise and served previously on the City of Hollywood Community Development Block Grant advisory board. He has supported The Homeless Coalition of Broward County, Women In Distress, and Broward Housing Solutions, to name a few. He has provided hundreds of hours of volunteer homeownership counseling assistance to thousands of participants in Miami-Dade, Broward & Palm Beach counties through various county, city and non-profit programs including the Urban League and the Broward & Miami-Dade Housing Finance authorities.

Mr. Bishop has received numerous awards for his community service including being honored for his community housing activities by the Broward Black Elected Officials at its 2007 Gala. In addition, the Congressional Black Caucus recognized this outstanding community servant. His charitable work was recognized on a national level by Neighborhoods, USA (NUSA), a non-profit organization committed to building and strengthening our neighborhood organizations.

**Maurice Menasche**, AIA is an award winning South Florida residential design firm practicing the highest levels of craft and quality throughout the architectural process. Maurice Menasche, AIA, LEED AP, is a licensed architect in the State of Florida. He is registered with the Florida State Board of Architecture and Interior Design, certified by the national Council of Architectural Registration Boards, and a member of the American Institute of Architects and the US Green Building Council.

**Jeffrey T. Schnars**, PE, Schnars Engineering Corporation, is a professional design and consulting firm specializing in the development of public and private infrastructure in Florida. The firm provides civil engineering design, planning, regulatory permitting and construction administration services for roadways, utilities, storm drainage and site development projects. Schnars Engineering Corporation is one of the most productive and versatile design firms in the region. Since its founding in 1993, they have successfully completed over 340 major projects in Florida covering 19,000 acres of land in 12 counties and 50 municipalities. Today, the firm continues to help many prominent clients find solutions to the State's ever increasing land development challenges.

## **5. Documentation demonstrating the respondent's financial capacity to acquire (to be determined) and develop the property and to obtain financing for large-scale real estate development project.**

Because of significant public subsidy needed to implement this project, Stuart & Shelby Development propose that the Redevelopment Agency retain ownership of the property, and contribute the value of the land to the project. By retaining ownership of the land, the project will be better able to obtain funding subsidies (such as CDBG) to construct the infrastructure improvements, and to provide soft-second mortgages to homebuyers. The Stuart & Shelby Development team has experience with federal and state grants, as well as municipal capital improvement and redevelopment agency funding, and assist to obtain the funding needed for the infrastructure and home building.

**205 George Bush Blvd • Delray Beach, FL 33444**

Phone 561-637-7902 • Fax 561-637-7904 • [www.stuartandshelby.com](http://www.stuartandshelby.com)

# STUART & SHELBY DEVELOPMENT- GENERAL CONTRACTORS

## 6. List of references including contact names, addresses, telephone numbers and facsimile numbers.

Hallandale CRA  
400 S. Federal Highway  
Hallandale Beach, FL 33009  
Daniel Rosemond, Deputy City Manager/CRA Director  
Ph: 954-457-2228  
Fax: 954-457-1342  
drosemond@hallandalebeachfl.gov

Lake Worth CRA  
29 South J Street  
Lake Worth, FL 33460  
Joan Oliva, Executive Director  
Ph: 561-493-2550  
Fax: 561-493-2549  
Joliva@lakeworth.org

Delray Beach CRA  
20 North Swinton Avenue  
Delray Beach, FL 33444  
Jeff Costello, Executive Director  
Ph: 561-276-8640  
Fax: 561-243-8558  
costelloj@mydelraybeach.com

Delray Beach Community Land Trust  
145 SW 12th Avenue  
Delray Beach, FL 33444  
Evelyn Dobson, Executive Director  
Ph: 561 243-7505  
Fax: 561-243-7501  
dobson@mydelraybeach.com

Adopt A Family of the Palm Beaches  
1712 2nd Avenue North  
Lake Worth, FL 33460  
Matt Constantine, Chief Executive Officer  
Ph: 561-253-1361  
Fax: 561-253-1370  
mconstantine@adoptafamilypbc.org

PARTNER & PARTIAL RECENT PROJECT PROFILE

**Chuck Halberg, President**

- Delray Beach Chamber of Commerce 2010/ 2011 Business Person of the Year
- Florida Licensed General Contractor since 1986
- In the construction industry since 1975 including South Florida since 1980
- Construction Management/ Executive since 1980 for three top 200 National Builders
- Oversaw the construction of over 2500 residential single family units, 3500 apartments, and 800,000 SF of commercial space since 1975
- **Personal strengths in business relations, product development, budget management quality control, customer satisfaction**

**Bill Neville, Vice President**

- In the construction industry in South Florida since 1983
- Managed purchasing department for organizations with annual construction budgets in excess of \$200,000,000 including 4 of Florida's top builders
- Bachelor of Science in Business Administration. Major in Business Management
- **Personal strengths in budget management, value engineering, product development, quality control**

**Chuck McGovern, Construction Manager**

- In the construction industry since 1980, in South Florida since 2000
- Oversaw construction of over 400 residential units in Palm Beach County since 2004 including custom homes, affordable homes and multifamily units
- **Personal strengths in job coordination, value engineering, quality control, customer satisfaction**



# PLACE Planning & Design

## Corey W. O’Gorman, AICP

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### Professional Qualifications

#### Corey W. O’Gorman, AICP, President

#### Areas of Expertise

Planning and project management including: feasibility analysis and due diligence; critical path scheduling and budgeting; development team selection, project financing (grants and loans), contract negotiation and management; zoning, entitlements and permitting; construction management; and grant administration.

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#### Education, Certifications & Affiliations

Bachelor of Arts, Environmental Studies  
Rollins College, Winter Park, Florida, 1983  
American Institute of Certified Planners (AICP)  
July, 1991  
Village of North Palm Beach, Planning Commission  
Florida Redevelopment Association,  
Past-Board of Directors Member  
American Planning Association  
Florida Housing Coalition, Frm Brd Member  
Florida Trust for Historic Preservation Member

#### Experience - Positions Held:

*PLACE Planning & Design, Inc.*, North Palm Beach, Florida; President (2006 – present)  
*Toll Brothers, Inc.*, Jupiter, FL; Project Manager (2005 – 2006)  
*Corey W. O’Gorman, AICP* North Palm Beach, Florida; President (2004 – 2005)  
*Collins Development Company, Inc.*, Palm Beach Gardens, Florida, Project Manager (1999 -2004)  
*Gainesville Community Redevelopment Agency*, CRA Manager (1996 – 1999)  
*The Urban Group, Inc.*, Fort Lauderdale, Florida Housing & Comm Dev Director (1993-1996)  
*Lee County Community Development & CRA*, Fort Myers, Florida, Senior Planner (1989-1993)  
*Allen Engineering*, Cocoa Beach, FL, Permit Coordinator (1988-1989)  
*City of Titusville, FL* Planner, Senior Planner, Interim Planning Director, Development Coordinator (1984-1988)

#### Project Management and/or Grant Administration

Hallandale Beach CRA, In-fill Homes, Hallandale Bch, FL  
Adopt-a-Family NSP2 Scattered Sites Rehabilitation and New Construction, *Lake Worth, FL*  
Wiley Apartments, *Lake Worth, FL*  
Oaks at Shannon’s Crossing Apts, *Okeechobee, FL*  
Eden Gardens Apts, *Immokalee, FL*  
Manatee Village Apts, *Ruskin, FL*  
Pollywog Creek Apts, *LaBelle, FL*  
Orchid Gardens, *Lake Worth, FL*  
Begonia Gardens, *Lake Worth, FL*  
American Orchid Society, *Delray Beach, FL*  
Greater Yamaha, *West Palm Beach, FL*  
Pollywog Senior Housing, *LaBelle, FL*  
Habitat for Humanity, Providence Point Infrastructure Construction, *Tampa, FL*  
In The Pines Phase 1 & 2, *Delray Beach, FL*  
Howard Park Ball-park Lighting, *Lake Worth, FL*  
Latona Avenue Infrastructure, *Lake Worth, FL*  
Washington Avenue Infrastructure, *Lake Worth, FL*  
Lake Worth Municipal Pool, *Lake Worth, FL*  
AHEPA Apartments, *West Palm Beach, FL*  
DEEDCO Gardens Apartments, *Homestead, FL*  
Villa Franciscan Apts, *Riviera Beach, FL*  
Villa Madonna Apts, *West Palm Beach, FL*

## **Housing Foundation of America, Inc.**

Housing Foundation of America, Inc. is a 501c (3) non-profit organization that provides financial literacy to low and moderate income individuals in search of homeownership, and livable affordable housing. Housing Foundation of America is HUD approved housing counseling agency and currently performs the (8) hour homebuyer certification counseling for various cities thorough out Palm Beach and Broward County. Housing Foundation of America's (HFA) programs are specifically targeted to low-moderate income (LMI) individuals and households that are in need of affordable housing and that are most "at-risk" for homelessness. HFA characterizes individuals that are ""at-risk"" for homelessness as follows:

1. Impending eviction (2 weeks) from private home.
2. Condemnation of the current residence.
3. Sudden loss of income.
4. Severe housing cost burden or increase in monthly rent.
5. Pending foreclosure of rental housing.
6. Credit problems that preclude them from obtaining housing.
7. Extremely low income (less than 30% AMI).

The path to cure chronic homelessness, may be arguable, but the source of the problem is less debatable. Research reports that the single largest contributing factor to homelessness in Florida is the lack of affordable housing (2010 Homeless report).

Therefore, there is a need for an agency such as HFA and its plan to expand services to the segment of the population that is most "at-risk". This proposal also meets the increasing demand from new buyers entering the local housing market as a result of the improving national economy. **HFA integrates its programs and services with existing community organizations to expand its reach to more LMI households within the community.** Partnership has proven to be useful tool for successful ventures in both the private and public sector. Over the course of our operations we found a duplication of efforts between organizations. This results mostly from linear communication, rather than transactional or engaged communication amongst the organizations. A more engaged communication provides for greater impact in the community because synergies are formed, rather lost in duplication of services. HFA will established a partnership with a locally based housing organization, H2H Home Buyers Club (H2H), where its mission is to empower individuals that are experiencing, condemnation, foreclosure, sudden loss of income, or an event that would cause them to be "at-risk" for homelessness. H2H brings formerly homeless and housing cost burdened individuals together in support of the collective goal of affordable and permanent housing. The collaboration between HFA and H2H programs allows individuals with income at 30% – 80% of AMI to gain access to affordable permanent housing through subsidies targeted for very-low income and affordable rental housing through HFA's CHDO network. Meanwhile, those individuals that are earn between 60-120% AMI can prepared for homeownership through the one-on-one counseling, preapproval with a community lender and qualification for down payment assistance.

**HFA's project plans to offer more financial literacy and housing education courses throughout the City.** One of the project's goals is to use proven methods to increase the number of empowered, LMI homebuyers. In pursuit of this goal, HFA has an established partnership with the H2H Homebuyers Clubs (H2H). Members attend monthly meeting to learn

about the multiple facets of the home-buying experience. Services are currently offered onsite at Mt. Olive Baptist Church, in the City of Hallandale the Town of Davie and a Joint Boca Raton/Deerfield Beach site. However, high demand courses are offered only on the weekend. HFA's service delivery platform includes online classes to allow households with schedule constraints access and an opportunity to our programs.

Incorporating technology allows HFA to offer more diverse subject matter on financial literacy, which may not have been feasible as an onsite workshop. It also allows us to leverage existing technology in order to offer homebuyer education online to those participants that have severe schedule and transportation restraints.

The national economy is coming back, consumer confidence is trending upward and mortgage rates support a recovering housing market (new America funding). Even though rates are increasing, historically mortgages are more affordable than they have been in decades (New America, 2014) which make purchasing a home more affordable, particularly in a rising rent environment.

Banks and lending institutions that offer community mortgages, FHA/VA and other owner occupant targeted financing often require housing education. As the demand for owner occupant housing continues to increase, HFA will manage and service prospective home buyers. In addition, home buyers who receive pre-purchase counseling are one-third less likely to fall behind 90 days or more on their mortgage within two years of origination than those who did not received pre-purchase housing counseling (Cite NW.org)

HFA's offers a full range of housing related programs and services to individuals and families to help them understand the responsibilities of homeownership and to assist them in resolving housing related issues. These services include, but are not limited to, the following:

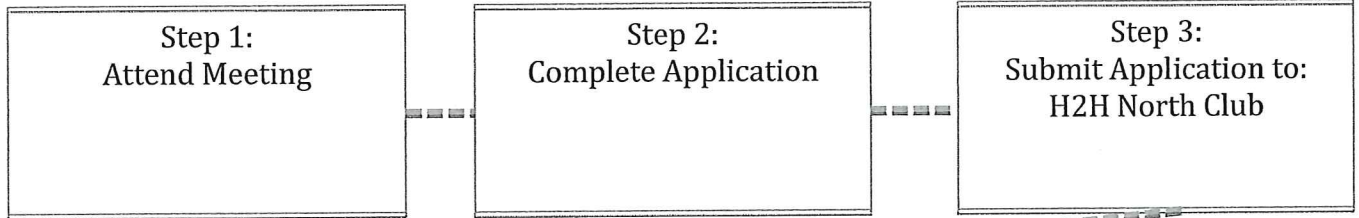
**Home Buyer Education.** Certified HUD approved workshops offered to the community. Participants learn about FTHB programs available in each City and County. Workshop covers topics such as: Obtaining a mortgage, the sales contract, selecting a Realtor ® and closing on a new home. We also assist buyers with location Down Payment Assistance such as the Florida Bond, SHIP, HOME, MCC, HOPE and Lender in house assistance.

**One-on-One Housing Counseling.** Counseling sessions for individuals with financial issues that will take more than 6 months months to resolve. This includes counseling for personal credit issues, money management and budgeting. Analysis of income assets are conducted in these sessions and financial plans and goals are established.

**Intervention Services.** Refinancing assistance, foreclosure and loss mitigation options for all types of mortgages including: FHA, VA and Conventional.

Housing Foundation of America, Inc. has been and still is the primary Housing Counseling agency for the very successful NSP programs of Broward County, The City of Fort Lauderdale, The Town of Davie and the City of Tamarac. We have closed on over 135 homes in the last three years using the NSP and First Time Home buyer programs.

## H2H Homebuyer's Club Process



**Is the application complete?**

**If "YES"**  
Application is reviewed  
by Housing Foundation of  
America, Inc.

**If "NO"**  
-Return to Step 2



**Step 4:**  
Receive Pre-Qualification  
Status Letter

**Step 5:**  
Receive Pre-Qualification  
Letter (P)

**Step 6:**  
Referred to Lender

OR

**Step 5:**  
Receive Conditional  
Pre-Qualification, 0-3 months  
Letter (A)

**Step 7:**  
Select Home  
Contract  
Application  
Process

OR

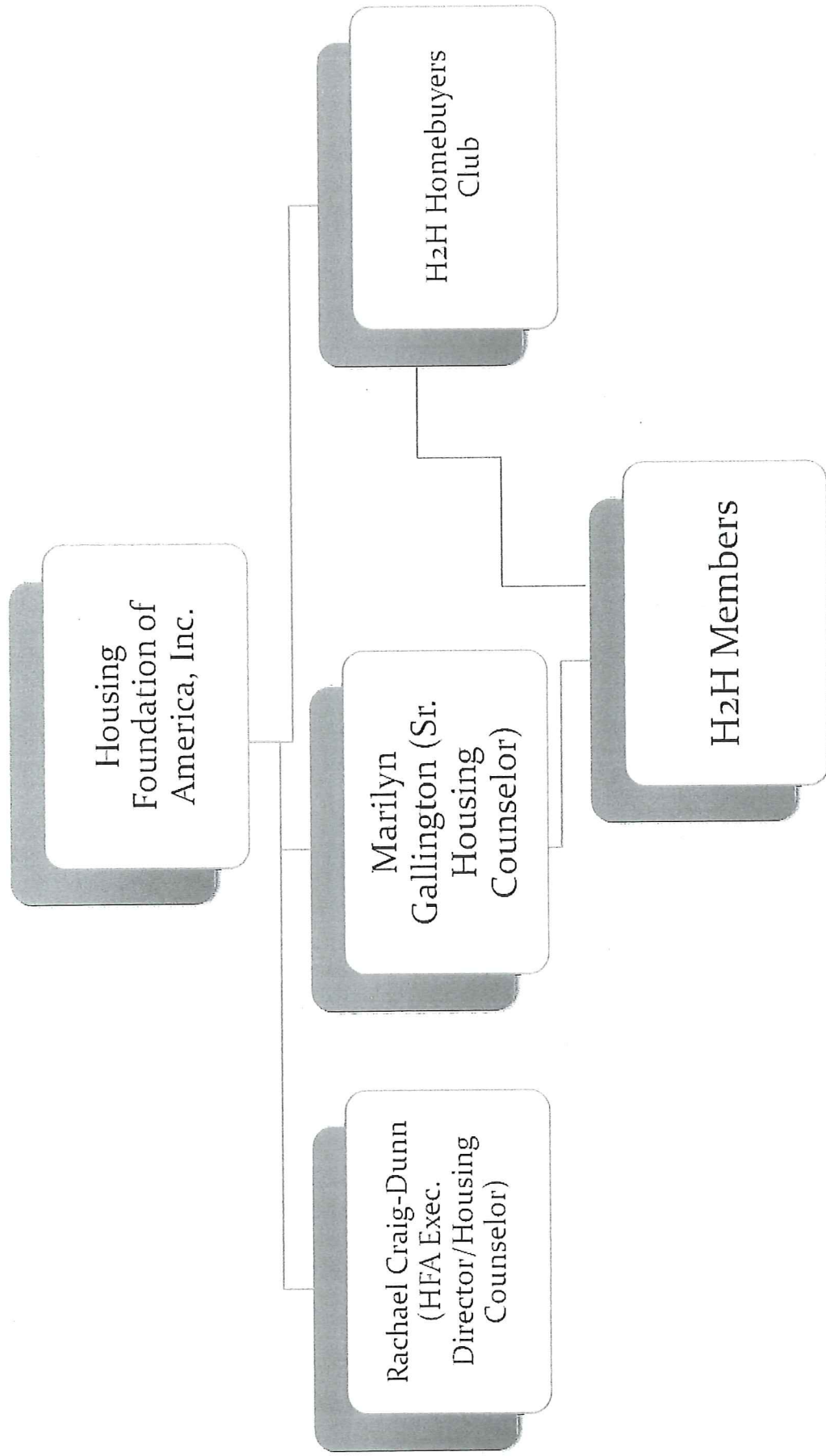
**Step 5:**  
Repair Required, 3-6 months  
Letter (B)

OR

**Step 5:**  
Continued Counseling &  
Education, 6+ months  
Letter (C)



# Housing Foundation of America, Inc. Organization Chart





**REMINDER:**

**H2H Club meeting WEDNESDAY, February 26th!**

**6:00 to 8:00 PM**


**Town of Davie**

**(in Police Station)**

**1230 South Nob Hill Road**

**Davie, FL 33324**

**[CLICK HERE FOR THE FEBRUARY AGENDA](#)**

The H2H Club is now on Facebook - Click here  to "LIKE" us and find meeting agendas, updates and stories

**Welcome Hallandale Beach!**

38 new H2H Club members joined us last month for the first meeting in Hallandale Beach - now with three locations we are helping so many more on their road to homeownership



### Monthly Meeting Information

**South FL Educational Development Center, Inc (SFEDC)**  
**620 NW 2nd Avenue**  
**Hallandale Beach, FL 33009**  
Meets 2nd Wednesday, 6-8pm

**Mount Olive Baptist Church (MODCO)**  
**401 NW 9th Avenue**  
**Ft. Lauderdale, FL 33311**  
[Click here for directions](#)  
Meets 3rd Thursday, 6-8pm

**Davie Police Station**  
**1230 South Nob Hill Road**  
**Davie, FL 33324**  
[Click here for directions](#)  
Meets 4th Wednesday, 6-8pm

### WHAT'S COMING UP...

In February we will be discussing how to create SMART goals and taking a closer look at the Road to Homeownership

March will bring a lot of great information as we talk about how to understand and improve your credit score

#### UPCOMING MEETING DATES:

- February 12th - Hallandale
- February 20th - MODCO
- February 26th - Davie
  
- March 12th - Hallandale
- March 20th - MODCO
- March 26th - Davie



For More Information and to Reserve your Seat at the Next Meeting!

## THANK YOU TO OUR PARTNERS FOR YOUR SUPPORT





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*H2H Homebuyer's Club*  
[h2hflorida@gmail.com](mailto:h2hflorida@gmail.com)

**Forward this email**

 [SafeUnsubscribe](#)

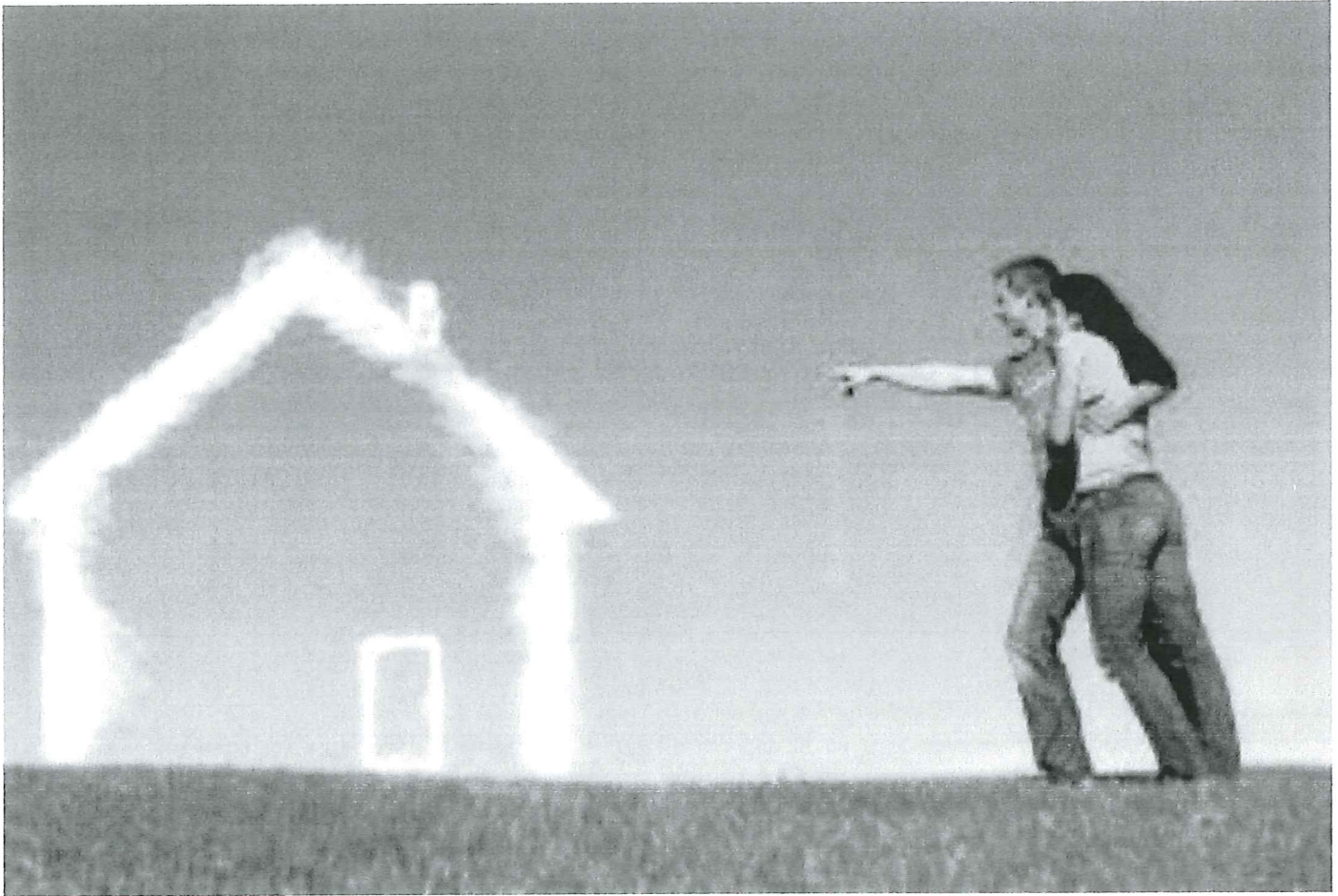
This email was sent to rachaldunn@yahoo.com by [hfatoday@gmail.com](mailto:hfatoday@gmail.com) |  
[Update Profile/Email Address](#) | Rapid removal with [SafeUnsubscribe™](#) | [Privacy Policy](#).



Housing Foundation of America | 2400 N University Drive | Suite200 | Pembroke Pines | FL | 33024



f Like



## IDA Orientation - June 26th!!!

The Urban League of Broward County will be offering an IDA Orientation on Thursday, June 26th from 5:30 pm to 7:00 pm.

Those who attend will receive information on eligibility requirements, process flow, program expectations, ending with a question and answer session.

### [CLICK HERE TO REGISTER TODAY](#)

or copy and paste this address into your browser:  
[www.idaorientation.eventbrite.com](http://www.idaorientation.eventbrite.com)

## JOIN THE H2H CLUB

Join us at one of the three Club meetings in Broward County to learn about topics such as:

**Budgeting, Understanding  
Repairing Credit, Preparing  
Taxes and so much more  
you along the road to  
homeownership.**

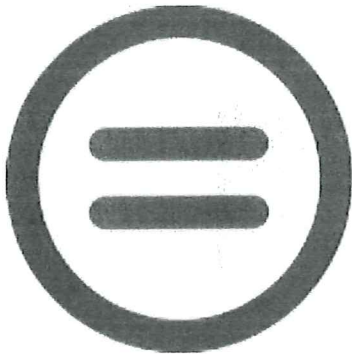
Now Offering Three (3)  
H2H Club Locations!

**South FL Education:  
Development Center,  
(SFEDC)  
620 NW 2nd Avenue  
Hallandale Beach, FL 33409**

**LOCATION:**

**URBAN LEAGUE OF BROWARD  
COUNTY 560 NW 27th Avenue,  
Fort Lauderdale, FL 33311**

[Click Here for Directions](#)



**Urban League of  
Broward County**



Meets 2nd Wednesday, 6

**Mount Olive Baptist Ch  
(MODCO)  
401 NW 9th Avenue  
Ft. Lauderdale, FL 33305  
[Click here for directions](#)  
Meets 3rd Thursday, 6-7**

**Davie Police Station  
1230 South Nob Hill Rd.  
Davie, FL 33324  
[Click here for directions](#)  
Meets 4th Wednesday, 6**

Are you ready to begin  
your journey to owning a home?

*Join H2H Homebuyer's Club  
[Sign up here.](#)*

The H2H Club is now on Facebook - Click here  to "LIKE" us and find meeting agendas, updates and

**Forward this email**

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[Update Profile/Email Address](#) | Rapid removal with [SafeUnsubscribe™](#) | [Privacy Policy](#).



Housing Foundation of America | 2400 N University Drive | Suite200 | Pembroke Pines | FL | 33024



# CITY OF HALLANDALE BEACH

## COMMUNITY REDEVELOPMENT AGENCY

September 26, 2014

To Whom It May Concern:

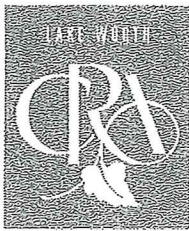
The Hallandale Beach Community Redevelopment Agency (HBCRA) is fortunate to have had the opportunity to partner with Stuart and Shelby Development in our pursuit of developing quality affordable housing for income eligible families. In 2014, Stuart and Shelby constructed eight single family homes dedicated as affordable housing opportunities. Stuart and Shelby delivered the units on time and according to budget.

In addition to their development work, Stuart and Shelby representatives are very active and responsive to the needs of the Agency and genuinely care about the end user of housing programs. The Hallandale Beach CRA highly recommends Stuart and Shelby Development for any housing development opportunities and would be happy to provide additional information if desired.

Sincerely,

Diana M. Wolfson  
Real Estate and Property Management Coordinator

C: File



LAKE WORTH COMMUNITY REDEVELOPMENT AGENCY 29 SOUTH J STREET SUITE 1 LAKE WORTH, FL 33460 T: 561 493 2550 F: 561 493 2549 LAKEWORTHCRA.ORG

September 29, 2014

To Whom it May Concern;

The City of Lake Worth, and in particular, the Community Redevelopment Agency, has in the past worked, and are currently working with Stuart and Shelby Development. Over the past several years, Stuart and Shelby has been a strong partner in helping the CRA meet its expenditure and output goals related to the Neighborhood Stabilization Grant (NSP-2) . Numerous homes have been built for both the CRA and our consortium partner, Adopt-a-Family of the Palm Beaches.

It has been a true pleasure working with Bill Neville and Chuck Halberg from Stuart and Shelby and I have nothing but high praise for their work ethic, their enthusiasm and dedication to providing quality construction on all their projects. They make themselves available, even at the last moment and work extremely well with other partners and with the City. They are very familiar with the requirements and regulations related to development in the County and with procurement procedures in City and State government.

I highly recommend this firm and would be more than happy to provide any additional information if needed.

Sincerely,

A handwritten signature in black ink, appearing to read "Joan Oliva". The signature is fluid and cursive, written over the printed name.

Joan Oliva  
Executive Director



**DELRAY BEACH CRA**  
COMMUNITY REDEVELOPMENT AGENCY

July 7, 2014

TO WHOM IT MAY CONCERN:

The Delray Beach Community Redevelopment Agency (CRA) has contracted with Stuart and Shelby Development on three construction projects, and provided partial funding for a fourth project. The projects are described as follows:

- Extensive renovation of a mixed use (residential and retail) building
- Restoration of a badly deteriorated historic structure
- Construction of a foundation for a relocated historic structure
- Small interior remodeling job.

The total value of these projects was approximately \$840,000.

Our agency's experience with Stuart and Shelby has been a very positive one. Chuck Halberg and his team handled all of these jobs with a high level of enthusiasm and professionalism. They communicated clearly regarding any issues that arose and were flexible in resolving any unforeseen problems. Their work was completed on time and within budget. We will definitely look for their participation in future projects.

If you have any questions or need additional information, please don't hesitate to call me at (561) 276-8640.

Sincerely,

A handwritten signature in black ink, appearing to read "Jeffrey A. Costello". The signature is fluid and cursive, written over a light blue horizontal line.

Jeffrey A. Costello, AICP  
Assistant Director



**Board of Directors** July 8, 2014

**Lula Butler**  
President

**Gary Eliopoulos**  
Vice President

**Vicki Hill**  
Treasurer

**Morrie Weinman**  
Secretary

**Kimberly Camejo**

**Patricia Wright**

**Polk Cotton**

**Vince Larkins**

**Elton McGowan, Jr.**

**Dysonya Mitchell**

**David Weatherspoon**

**Chuck West**

**Executive Director**  
Evelyn S. Dobson

**Liaison**  
City Commissioner  
Shelly Petrolia

Re: Letter of Reference

TO WHOM IT MAY CONCERN:

The Delray Beach Community land Trust has contracted with Stuart & Shelby Development on the development of more than 15 detached single family homes of various designs over the past six years, with donating a home and the land to the organization.

Our experience with Stuart & Shelby cannot be compared to any other. Mr. Halberg's team is highly professional, experts in the field, dedicated and enthusiastic. Their homes are completed timely and within cost. The working relationship between Stuart & Shelby and the Delray Beach CLT is long term and we assure you of complete satisfaction.

If you are in need of any additional information please do not hesitate to contact me.

Sincerely yours,

Evelyn S. Dobson  
Executive Director



# ADOPT-A-FAMILY of the Palm Beaches, Inc.

*Leaders in helping families help themselves.*

July 3, 2014

To whom it may concern:

Adopt-A-Family of the Palm Beaches, Inc. is fortunate to have had the opportunity to partner with Stuart and Shelby Development in our pursuit of developing quality affordable housing for homeless and low-income families. In 2008, Stuart Shelby constructed a nine-unit townhouse dedicated to housing homeless families. That project, Wiley Reynolds Gardens, was awarded "Best Affordable Housing Project" by the Florida Redevelopment Association in 2009.

The success of that project led us to partner with Stuart and Shelby for the Neighborhood Stabilization Program opportunity in Lake Worth. We developed 41 units of affordable housing dedicated to serving households earning less than 80% of the Area Median Income. The work consisted of a variety of development scenarios – new construction, significant rehab, and moderate rehabs. Similar to our first experience, Stuart and Shelby delivered our units on time and under budget.

In addition to their development work, the owners of Stuart and Shelby are very active in their communities and genuinely care about the end user of housing programs. I would highly recommend their company for any housing development opportunities and would be happy to provide additional information if desired.

Sincerely,

Matthew Constantine  
Chief Executive Officer



1712 Second Avenue North, Lake Worth, FL 33460-3210  
Phone: (561) 253-1361 Fax: (561) 253-1370  
[www.adoptafamilypbc.org](http://www.adoptafamilypbc.org)



*Please consider Adopt-A-Family in your will, and be sure to let us know.*

**SECTION 3**

**DESCRIPTION OF  
REPRESENTATIVE DEVELOPMENT  
PROJECTS**

# STUART & SHELBY DEVELOPMENT- GENERAL CONTRACTORS

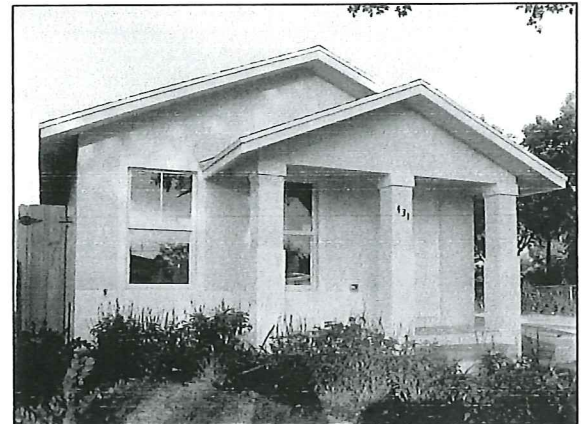
## SECTION 3. DESCRIPTION OF REPRESENTATIVE PROJECTS

**Hallandale Beach CRA – In-Fill Housing Project, Phase 1 (2013-2014, Complete).** General Contractor for the construction 8 new single-family homes. Project cost \$1,500,000+/- Commence Phase 2, 2015.



**Lake Worth CRA NSP2 (2011-2013 completed)**  
General Contractor for new construction and renovation for 46 units as part of this project. Worked closely to administer the HUD requirements for this project, purchased all contracts and full oversight of all construction activities. Project cost: \$5,500,000.00 +/-

**Delray Beach Community Land Trust (2009-2015)**  
General Contractor for the construction 12 new single family homes. Project cost \$2,700,000+/-



**Adopt A Family of the Palm Beaches (2008-2009 completed)**  
General Contractor on the 9 unit affordable housing project. Site development and full construction. Project cost (\$1,200,000 +/-)

**Multiple new single family homes in the Delray Beach area for private clients (2008-2015)**  
Design, develop and build for various private clients and spec homes. Total project cost over \$8,000,000.



205 George Bush Blvd • Delray Beach, FL 33444

Phone 561-637-7902 • Fax 561-637-7904 • [www.stuartandshelby.com](http://www.stuartandshelby.com)

## **SECTION 4**

# **ABILITY TO SECURE FINANCING**

205 George Bush Blvd • Delray Beach, FL 33444

Phone 561-637-7902 • Fax 561-637-7904 • [www.stuartandshelby.com](http://www.stuartandshelby.com)

## SECTION 4. ABILITY TO SECURE FINANCING

Project financing will be needed for the design, permitting, and construction of infrastructure and that of individual homes, and permanent mortgages will be needed for the purchase of the homes by income-qualified buyers. As a partnership, the need and ability to obtain project financing will be a team effort, and will require the use of numerous sources of funds for the various stages of development.

### Infrastructure Financing

Part of the Stuart & Shelby Development team is Corey W. O’Gorman of PLACE Planning & Design. Mr. O’Gorman has worked on numerous grants for development of affordable housing from grant writing, to underwriting, administration and close-out, and includes CDBG, Section 202, NSP2, SHIP, SAIL, HOME, and Tax Credits, as well as using private foundation and CRA funding. The Stuart & Shelby Development team will work with the City and CRA, and the City’s Grant Writer and Administrator Libby Woodruff, to formulate a strategy for funding to cost to design, permit and construct the required infrastructure. Funding may include the \$100,000 of CDBG roll-over funds appropriated to infrastructure in the 2014-2015 Annual Action Plan and City’s FY 2014/15 Financial Operating Plan.

### Homebuilding

Stuart & Shelby Development will work with the City and CRA to formulate the right strategy for funding construction of the homes. This could include short-term construction financing obtained by either the City or Stuart & Shelby, although the interest would add cost to the project. If funds are available through the City or CRA, construction could be paid for using scheduled construction draws through those funds with a full or partial pay-back upon closing on the sale to an income-qualified homebuyer.

### Home-Buyer Mortgages

Part of the Stuart & Shelby Development team is Chester Bishop of Surealty Title, Inc., and the Housing Federation of America. Mr. Bishop has successfully recruited and prequalified homebuyers throughout the Broward and Miami-Dade area for years. His work also includes assisting potential buyers to secure permanent mortgage financing with area lenders, and has done this successfully in numerous affordable housing projects throughout South Florida.

The actual sale price of the homes will depend on the appraised value, what a lender will be willing to loan, and the loan amount will be limited by the buyers income and credit rating. For instance, if a low- or moderate-income buyer is able to afford the principal, interest, taxes and insurance on a \$120,000 mortgage, but the home cost is \$150,000, the City/CRA will need to subsidize the purchase through a soft-second mortgage, and the buyers may need downpayment assistance. Strategy 3 of the City’s SHIP LHAP allows up to \$50,000 award subject to an affordability restriction, and thus this could a source of funding to assist with the sale of homes to income-qualified buyers.



June 24, 2014

RE: Stuart & Shelby Development, Inc.

To Whom It May Concern:

Please accept this letter of good standing and bank reference for the above referenced customer.

This account relationship is currently maintaining a low 6 figures in balances and was established with Paradise Bank since May 2012.

Our customer has a Stuart & Shelby Development very satisfactory banking relationship with us at Paradise Bank and is highly recommended for the normal business commitments.

If you need any further information pertaining to this or have any questions please contact me at 561-243-3033.

Sincerely,

A handwritten signature in black ink, appearing to read "Annie Ennis Leibovich". The signature is stylized with a large loop and a horizontal line.

Annie Ennis Leibovich  
VP/Branch Manager



CHASE PRIVATE CLIENT

July 3, 2014

RE: Stuart & Shelby Development, Inc

To Whom It May Concern:

Please accept this letter of good standing and bank reference for the above referenced customer.

Stuart & Shelby Development, Inc maintain low 6 figures in balances between their checking and savings accounts. They also have a credit line of \$100,000 with \$100,000 available to them. These accounts have been maintained since October 2006.

If you need any further information pertaining to this or have any questions please contact me at 561-495-4331.

Sincerely,

Brian Cosgrove

Relationship Banker

Deposit products and services offered by JPMorgan Chase Bank, N.A. Member FDIC.  
"Chase Private Client" is the marketing name for a business within JPMorgan Chase & Co. and its subsidiaries. Bank products and services are offered by JPMorgan Chase Bank, N.A. and its affiliates. Securities are offered by J.P. Morgan Securities LLC (JPMS), member FINRA, NYSE and SIPC.  
JPMS is an affiliate of JPMorgan Chase Bank, N.A.

Investment products: Not FDIC insured • No bank guarantee • May lose value

**SECTION 5**

**CONCEPTUAL DEVELOPMENT PLAN**

## SECTION 5. CONCEPTUAL DEVELOPMENT PLAN

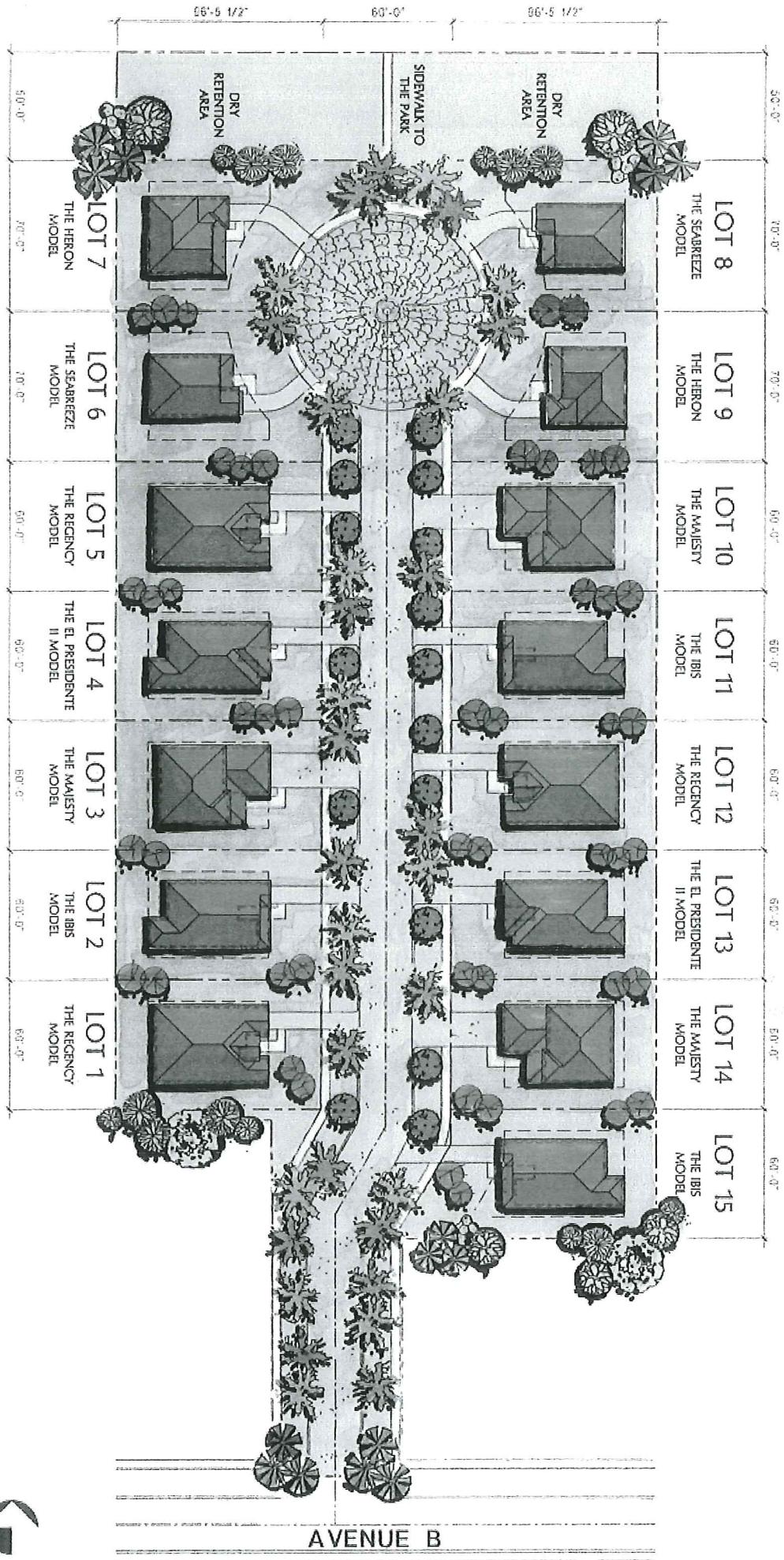
Based on the information supplied in the RFP along with preliminary due diligence conducted by the Stuart & Shelby Development team, a preliminary subdivision plan has been formulated and six model homes proposed as the Conceptual Development Plan for the Oaks at Moore's Creek Redevelopment Phase II project. Property dimensions are based on information obtained from the St. Lucie County Property Appraiser.

The preliminary plan includes a 60' wide public roadway terminating with a cul de sac at a 50' turning radius per subdivision regulations. The roadway will include pavement, curb-gutter, sidewalks, street trees, and street lighting compliant with City of Fort Pierce design standards, and extension of water lines, sewer lines and other utilities as needed.

The preliminary design also proposes to transition from homes to the Moore's Creek Linear Park with a landscaped stormwater retention area and pedestrian connection from the new subdivision to the park. The design anticipates coordination with the design detailing along Moore's Creek to the greatest extent possible, including street lighting, landscaping and pedestrian features.

The individual lots meet the minimum requirements of the R-4, Medium-Density Residential zoning district, and the conceptual development plan proposes a total of six (6) different models. There are three (3) one-story models and three (3) two-story models. Elevations and floor plans are attached. The one-story homes are three-bedroom, two-bath and one-car garage. Two (2) of the two-story homes are three-bedroom (3), two and one-half (2 ½) bath, with a one-car garage, and one of the two-story homes is four (4) bedroom, two and one-half (2 ½) bath, with a two-car garage.

Also attached are the home specifications. Stuart & Shelby Development builds high quality homes with quality finishes that will stand the test of time, and remain affordable for homebuyers long into the future. Specifications include features that ensure energy efficiency, safety, as well as low maintenance for the buyers such as CBS exterior walls, hurricane impact windows and doors, minimum 14 SEER air conditioning, R-30 ceiling insulation, ceramic tile in living areas, carpet in bedrooms, alarm system, ceiling fans, Energy Star appliances, and high quality kitchen and bath finishes.



AVENUE B

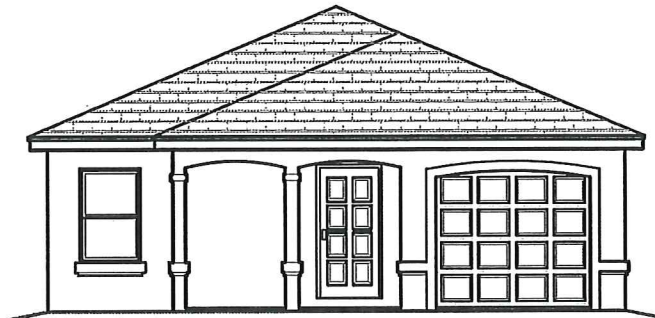
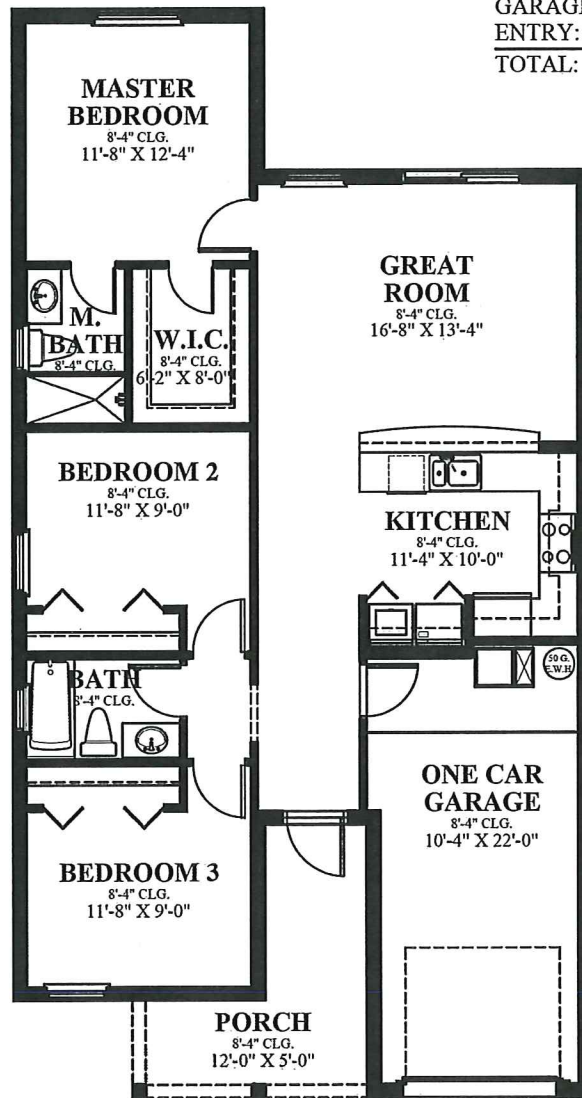


# The El Presidente II

Three Bedrooms, Two Baths, One Car Garage

## AREA CALCULATIONS:

A/C LIVING AREA:	1,127 SQ. FT.
GARAGE:	267 SQ. FT.
ENTRY:	109 SQ. FT.
<b>TOTAL:</b>	<b>1,503 SQ. FT.</b>



ALL IDEAS, DESIGN'S ARRANGEMENTS AND PLANS INDICATED OR REPRESENTED BY THIS DRAWING ARE OWNED BY AND THE PROPERTY OF THIS OFFICE AND WERE CREATED, EVOLVED AND DEVELOPED FOR USE ON, AND IN CONNECTION WITH, THE SPECIFIED PROJECT. NONE OF SUCH IDEAS, DESIGN, ARRANGEMENTS OR PLANS SHALL BE USED BY OR DISCLOSED TO ANY PERSON, FIRM OR CORPORATION FOR ANY PURPOSE WHATSOEVER WITHOUT THE WRITTEN PERMISSION OF MAURICE MENASCHE, ARCHITECT.

Stuart & Shelby Development, Inc.

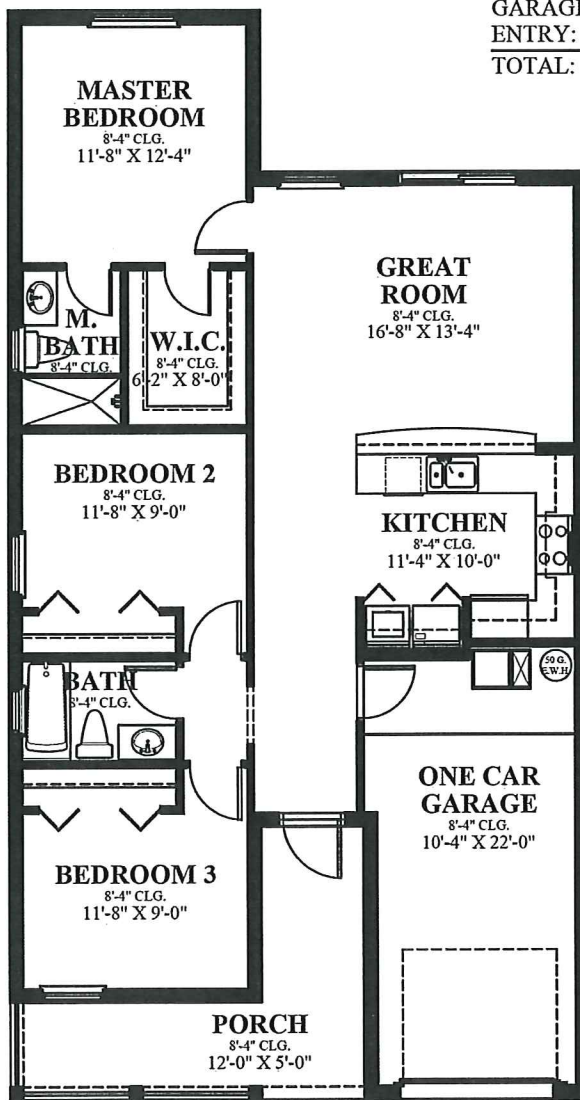
205 George Bush Boulevard - Delray Beach, FL 33444 Phone: (561) 637-7902 • Fax: (561) 637-7904 • www.stuartandshelby.com

# The Ibis

Three Bedrooms, Two Baths, One Car Garage

## AREA CALCULATIONS:

A/C LIVING AREA:	1,127 SQ. FT.
GARAGE:	267 SQ. FT.
ENTRY:	140 SQ. FT.
<b>TOTAL:</b>	<b>1,534 SQ. FT.</b>



ALL IDEAS, DESIGNS, ARRANGEMENTS AND PLANS INDICATED OR REPRESENTED BY THIS DRAWING ARE OWNED BY AND THE PROPERTY OF THIS OFFICE AND WERE CREATED, EVOLVED AND DEVELOPED FOR USE ON, AND IN CONNECTION WITH, THE SPECIFIED PROJECT. NONE OF SUCH IDEAS, DESIGN, ARRANGEMENTS OR PLANS SHALL BE USED BY OR DISCLOSED TO ANY PERSON, FIRM OR CORPORATION FOR ANY PURPOSE WHATSOEVER WITHOUT THE WRITTEN PERMISSION OF MAURICE MENASCHÉ, ARCHITECT.

Stuart & Shelby Development, Inc.

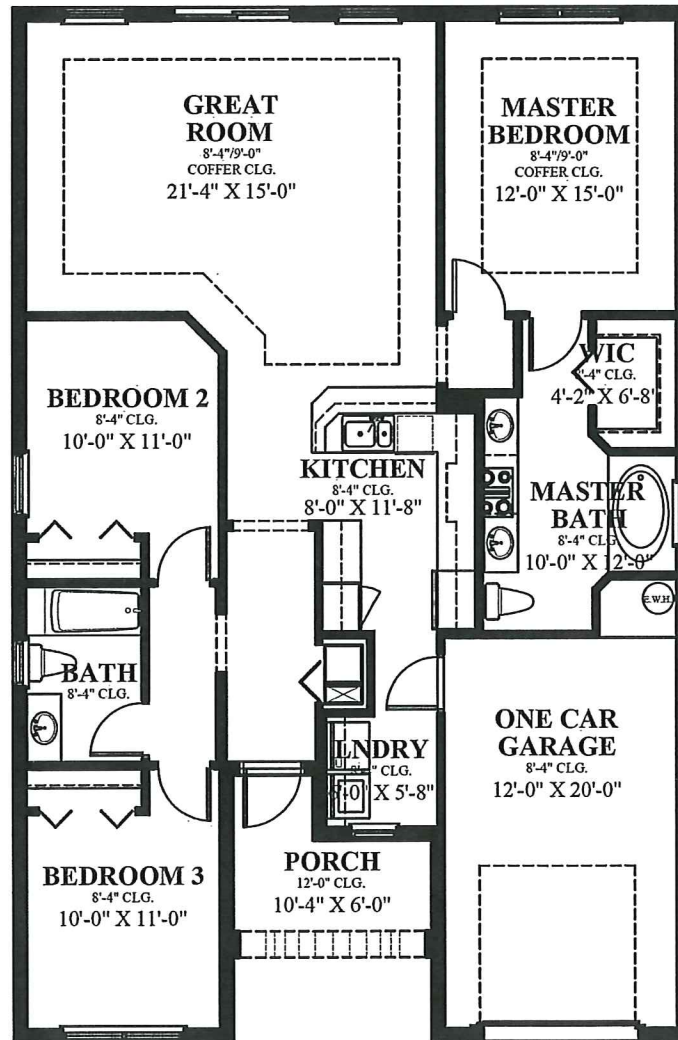
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# The Regency

Three Bedrooms, Two Baths, One Car Garage

## AREA CALCULATIONS:

A/C LIVING AREA:	1,453 SQ. FT.
GARAGE:	282 SQ. FT.
ENTRY:	76 SQ. FT.
<b>TOTAL:</b>	<b>1,811 SQ. FT.</b>



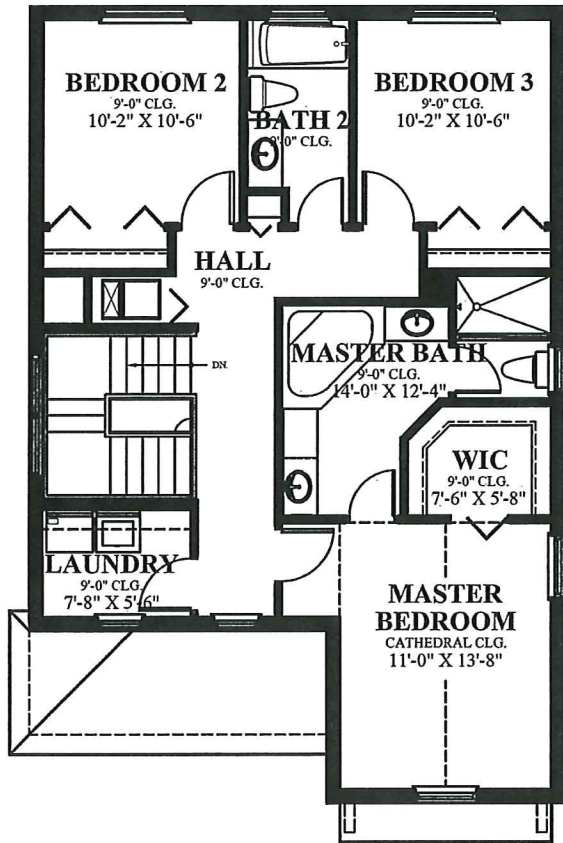
ALL IDEAS, DESIGNS, ARRANGEMENTS AND PLANS INDICATED OR REPRESENTED BY THIS DRAWING ARE OWNED BY AND THE PROPERTY OF THIS OFFICE AND WERE CREATED, EVOLVED AND DEVELOPED FOR USE ON, AND IN CONNECTION WITH, THE SPECIFIED PROJECT, NONE OF SUCH IDEAS, DESIGN, ARRANGEMENTS OR PLANS SHALL BE USED BY OR DISCLOSED TO ANY PERSON, FIRM OR CORPORATION FOR ANY PURPOSE WHATSOEVER WITHOUT THE WRITTEN PERMISSION OF MAURICE MENASCHE, ARCHITECT.

Stuart & Shelby Development, Inc.

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# The Seabreeze

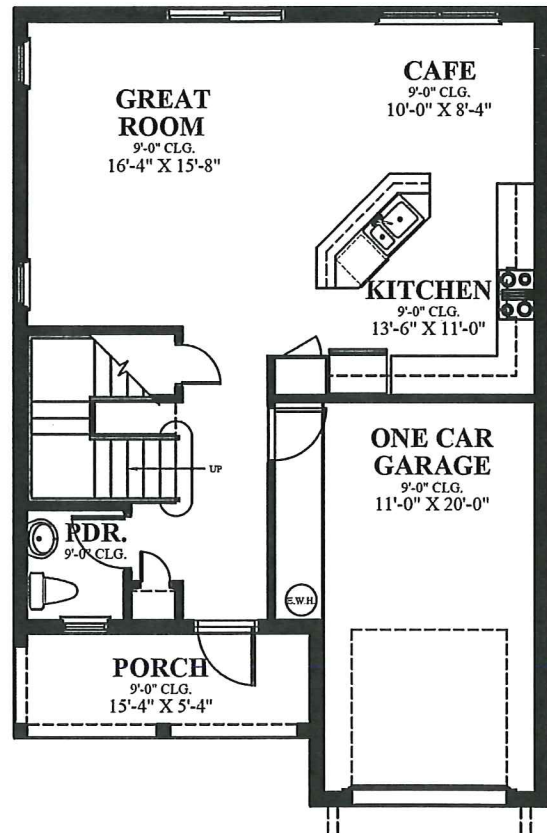
Three Bedrooms, 2 1/2 Baths, One Car Garage



SECOND FLOOR PLAN

**AREA CALCULATIONS:**

FIRST FLOOR A/C AREA:	718 SQ. FT.
SECOND FLOOR A/C AREA:	922 SQ. FT.
TOTAL A/C LIVING AREA:	1,640 SQ. FT.
GARAGE:	278 SQ. FT.
PORCH:	82 SQ. FT.
TOTAL:	2,000 SQ. FT.



FIRST FLOOR PLAN



ALL IDEAS, DESIGNS, ARRANGEMENTS AND PLANS INDICATED OR REPRESENTED BY THIS DRAWING ARE OWNED BY AND THE PROPERTY OF THIS OFFICE AND WERE CREATED, EVOLVED AND DEVELOPED FOR USE ON, AND IN CONNECTION WITH, THE SPECIFIED PROJECT. NONE OF SUCH IDEAS, DESIGN, ARRANGEMENTS OR PLANS SHALL BE USED BY OR DISCLOSED TO ANY PERSON, FIRM OR CORPORATION FOR ANY PURPOSE WHATSOEVER WITHOUT THE WRITTEN PERMISSION OF MAURICE MENASCHE, ARCHITECT.

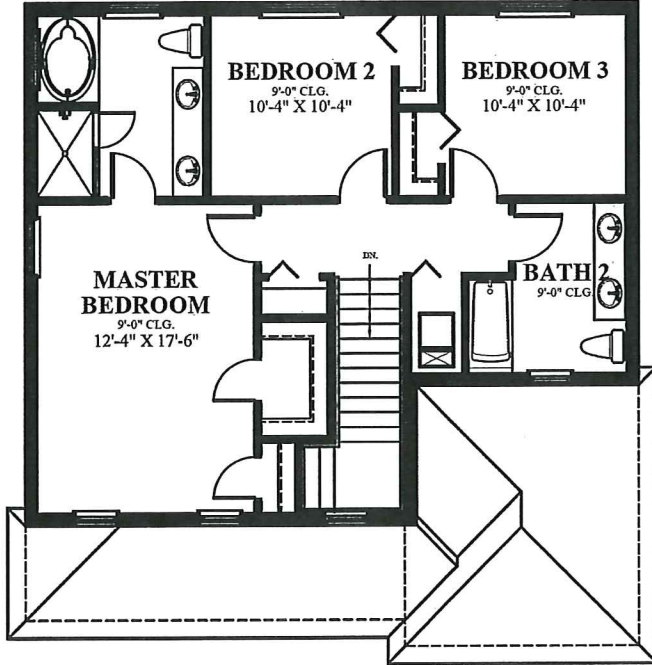
Stuart & Shelby Development, Inc.

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# The Heron

Three Bedrooms, 2 1/2 Baths, One Car Garage

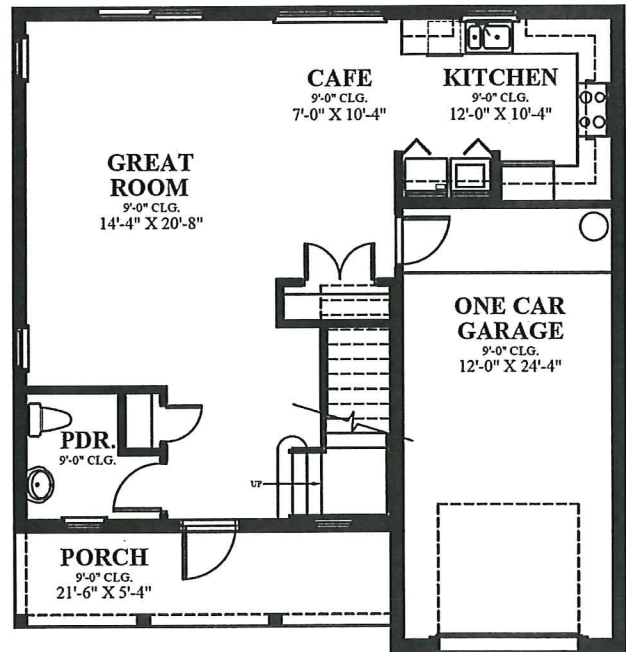
**MASTER BATH**  
9'-0" CLG.  
9'-6" X 10'-4"



**SECOND FLOOR PLAN**

**AREA CALCULATIONS:**

FIRST FLOOR A/C AREA:	797 SQ. FT.
SECOND FLOOR A/C AREA:	859 SQ. FT.
<b>TOTAL A/C LIVING AREA:</b>	<b>1,656 SQ. FT.</b>
GARAGE:	321 SQ. FT.
PORCH:	115 SQ. FT.
<b>TOTAL:</b>	<b>2,092 SQ. FT.</b>



**FIRST FLOOR PLAN**



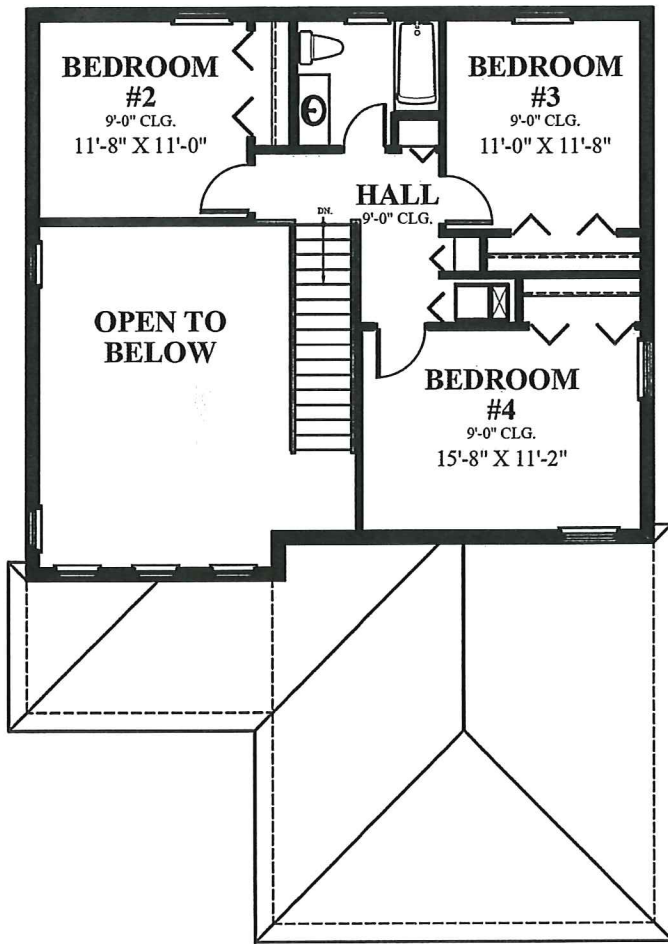
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**Stuart & Shelby Development, Inc.**

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# The Majesty

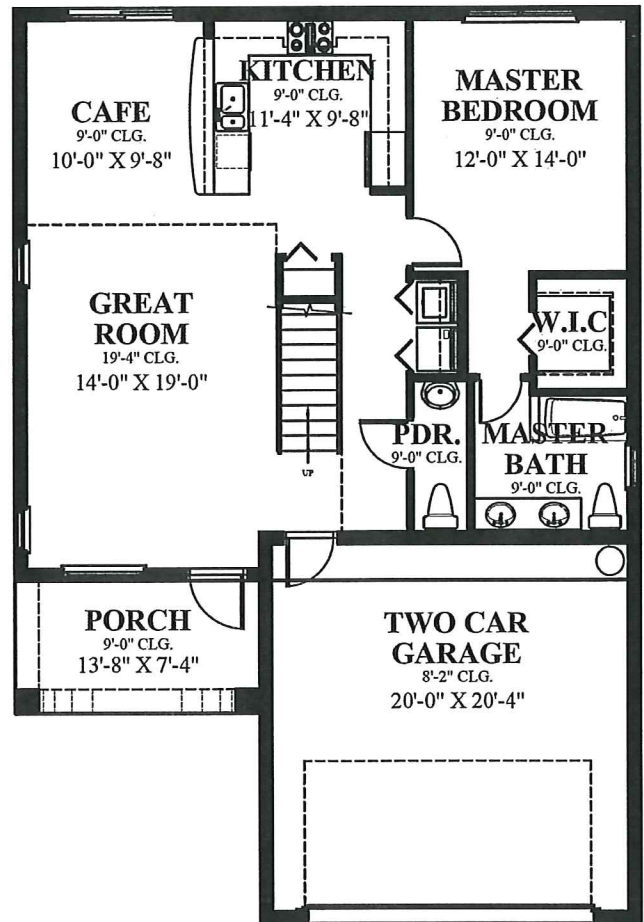
Four Bedrooms, 2 1/2 Baths, Two Car Garage



SECOND FLOOR PLAN

**AREA CALCULATIONS:**

FIRST FLOOR A/C AREA:	1,067 SQ. FT.
SECOND FLOOR A/C AREA:	714 SQ. FT.
<b>TOTAL A/C LIVING AREA:</b>	<b>1,781 SQ. FT.</b>
<b>GARAGE:</b>	<b>447 SQ. FT.</b>
<b>PORCH:</b>	<b>100 SQ. FT.</b>
<b>TOTAL:</b>	<b>2,328 SQ. FT.</b>



FIRST FLOOR PLAN



ALL IDEAS, DESIGNS, ARRANGEMENTS AND PLANS INDICATED OR REPRESENTED BY THIS DRAWING ARE OWNED BY AND THE PROPERTY OF THIS OFFICE AND WERE CREATED, EVOLVED AND DEVELOPED FOR USE ON, AND IN CONNECTION WITH, THE SPECIFIED PROJECT. NONE OF SUCH IDEAS, DESIGN, ARRANGEMENTS OR PLANS SHALL BE USED BY OR DISCLOSED TO ANY PERSON, FIRM OR CORPORATION FOR ANY PURPOSE WHATSOEVER WITHOUT THE WRITTEN PERMISSION OF MAURICE MENASCHE, ARCHITECT.

Stuart & Shelby Development, Inc.

205 George Bush Boulevard - Delray Beach, FL 33444 Phone: (561) 637-7902 • Fax: (561) 637-7904 • www.stuartandshelby.com

## Single Family Home Specifications

### Inspiring Architecture and Design Features

- Monolithic Slab and CBS exterior walls
- Prefabricated wood truss system
- Covered Entry on all models
- GAF Timberline Lifetime HD dimensional shingles (or equal)
- Gutters on all hip elevations
- Stucco textured finish on exterior walls and overhangs
- Decorative stucco per plan
- Designer paint schemes as per scope
- Concrete patios, driveways and entry walks will be a broom swept finish
- Hurricane impact rated windows and sliding glass doors (where applicable)
- Hurricane impact rated metal embossed garage door with opener
- Hurricane impact rated fiberglass six panel entry door
- Fully landscaped lot with sod
- Automatic irrigation system with time clock and rain sensor
- Exterior hose connection (minimum two per home)
- Exterior GFI receptacle (minimum two per home )
- Coach light on one side of garage door and double flood lights on three other corners of home
- Minimum 14 SEER air conditioning system with digital thermostat (Carrier or equal)

### Custom Interior

- Knockdown drywall finish on ceilings and walls except bathroom ceilings and walls are orange peel)
- White flat paint on all ceilings & walls, white semi glass on all doors and trim.
- Stucco finish on garage masonry walls will be light texture
- Dramatic volume or tray ceilings if applicable per plan
- R-30 ceiling insulation, R4.2 foil on exterior masonry walls
- Hollow core 2 panel interior doors
- Decorative 2-1/4" casing on all swing doors and 4-1/4" base boards in all rooms except bath rooms.
- Lever door hardware on all interior doors (brushed chrome finish)
- 16"- 18" ceramic tile flooring in all first floor living areas except bedrooms (Dal Tile choice of 6 colors)
- FHA carpet and pad in all bedrooms, den, stairs and second floor hallways (Shaw or Mohawk choice of 12 colors)
- Carrera white/ gray marble window sills
- Abundant bedroom and linen closets and kitchen pantry closets per plans.
- Ventilated "free glide" vinyl coated metal closet shelving
- Minimum 50 gallon electric water heater

205 George Bush Blvd • Delray Beach, FL 33444

Phone 561-637-7902 • Fax 561-637-7904 • [www.stuartandshelby.com](http://www.stuartandshelby.com)

# STUART & SHELBY DEVELOPMENT- GENERAL CONTRACTORS

- Minimum 150 amp electric service
- "Decora" rocker light switches through out home with standard receptacle
- Smoke detectors inside and outside all bedrooms. Carbon detectors per code
- Cable outlets in all bedrooms and family room or living room
- Phone outlets in all bedrooms and kitchen
- Structure wiring to On-Q panel for TV, Telephone and alarm.
- Alarm system on all exterior doors and house to garage door, one motion detector and one key pad by garage door. Windows can be alarmed for an additional cost. Alarm monitoring is not included but available
- 52" white ceiling fans with light kit in all bedrooms
- Deluxe lighting fixture package for bathrooms, foyer, dining room, hallway and walk in closets

## Gourmet Kitchen

- Timberlake flat panel oak cabinet doors with knobs on doors drawers- 3 color choices
- 1-1/2" laminate countertop with 4" back splash in standard colors
- 60/40 stainless steel sink
- Moen single lever faucet with side spray
- General Electric Appliance in black or white
- Energy Star Refrigerator 25 cf side x side with ice and water in door
- Energy Star Dishwasher
- Electric 30" range Ceran top
- Energy Star over the range microwave
- Full size Energy Star Washer and Full size Dryer
- Badger V garbage disposal

## Luxurious Baths

- Timberlake flat panel oak cabinet doors with knobs on doors drawers - 3 color choices
- Dal Tile in baths- walls 9 x 12 and floors 12 x 12 (choice of 6 colors)
- 1-1/2" laminate countertop with 4" back splash in standard colors
- 17" round Briggs or equal sink in white
- Briggs steel bath tub in secondary baths- white
- Moen Chateau single lever chrome faucet in all baths
- Full length mirror over vanity to a height of 42"
- Chrome bath accessories include towel bar and paper holder in each bath
- Recessed medicine cabinet in all baths
- Briggs elongated commodes in white
- Backing for handicap grab bars in walls behind toilet, tub and shower (handicap bars not included)

205 George Bush Blvd • Delray Beach, FL 33444

Phone 561-637-7902 • Fax 561-637-7904 • [www.stuartandshelby.com](http://www.stuartandshelby.com)

**SECTION 6**

**CONSISTENCY WITH REDEVELOPMENT  
PLAN**

## SECTION 6. CONSISTENCY WITH THE REDEVELOPMENT PLAN

The Oaks at Moore's Creek Redevelopment Phase II project is located in the Neighborhoods, Sub-Area 3 of the Fort Pierce Community Redevelopment Plan. The Plan states that 'while renewal and redevelopment have been active in the downtown area for a number of years, the neighborhoods have not received the attention that they need.' And, although the City and Redevelopment Agency have heavily invested in the neighborhoods since the Plan was adopted in 2001 through housing improvements (Phase I and other projects) and infrastructure (Moore's Creek Linear Park) there is still a significant opportunity to enhance the neighborhood through improvements to the housing stock.

In this regard, the City of Fort Pierce Community Redevelopment Plan includes the following statements, opportunities, goals, objectives and policies:

- 1999 Study by Henry Moore recommended:
  - A neighborhood with residents at the center of community building activities leading community work
  - A neighborhood free of blighted vacant lots
  - A neighborhood free of substandard housing
- A 2000 report by the City Manager included additional strategies including converting rental properties into owner occupied properties
- Sub-Area 3 "Problems" include:
  - Housing stock in poor condition
  - Substantial number of vacant lots
  - Lack of sidewalks
  - Majority of rental residents
  - Vacant and underutilized property
  - Vacant property providing a place for littering
- Sub-Area 3 "Needs" include:
  - Develop strategy for single family homeownership
  - Need to remove blighting influences
  - Need to create a neighborhood free of substandard housing
  - Need to create a neighborhood free of blighted vacant lots
  - Need to improve pedestrian linkages to commercial and downtown
  - Neighborhoods need sidewalks and lighting
  - Need for neighborhood lighting for nighttime security
- Sub-Area 3 "Opportunities" include:
  - Utilize the abundance of vacant lots for new construction and home ownership
  - Vacant buildings and land can be redevelopment sites
- Group "2" Redevelopment, #2.1 "Affordable Housing" states that "the overall objective is to invigorate the neighborhood with new homebuyers and establish the area as a viable home ownership community." Objectives include:
  - Provide decent, affordable housing for residents who are of low to moderate-income level.
  - Stabilize and preserve the neighborhoods through redevelopment and the elimination of slum and blight.
  - Encourage fee simple home ownership.

# STUART & SHELBY DEVELOPMENT- GENERAL CONTRACTORS

Project description states that the “target area for establishing affordable housing is generally the area described in the ... Neighborhood Sub-Area.” It also states that “components of the affordable housing program may include:

- Home Buyer Assistance (subsidies secured by CRA soft junior mortgages)
- Homebuyer’s marketing program

This proposal offered by Stuart & Shelby Development furthers the goals, objectives, policies and programs of the Redevelopment Plan by:

- Redevelopment of vacant property
- Focus on homeownership for low- and moderate-income households
- Construction of a subdivision that includes sidewalks, streetlights and connection to existing pedestrian network
- Construction of new high quality single-family homes that are energy efficient, meet hurricane impact requirements, are low maintenance and will remain affordable long after purchase

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**SECTION 7**

**PRELIMINARY ASSESSMENT OF  
TRAFFIC IMPACTS**

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## SECTION 7. PRELIMINARY ASSESSMENT OF TRAFFIC IMPACTS

The Preliminary Development Plan for the Oaks at Moore's Creek Phase II is for construction of fifteen (15) single-family homes. As the industry source for trip generate, the Institute of Transportation Engineers (ITE) has conducted numerous studies on the generation of trips for single-family homes, and breaks down trip generation on a AM and PM peak hour as well as a daily weekday rate.

Using the average AM and PM peak rate, and daily weekday rate for single-family homes, the following is a preliminary assessment of traffic impacts on the existing roadway system from this project which will add fifteen homes to the neighborhood:

- AM Peak – Average rate  $0.75 \times 15 = 11.25$  peak hour trips
- PM Peak – Average rate  $1.01 \times 15 = 15.15$  peak hour trips
- Average Daily Trips –  $9.57 \times 15 = 143.55$  trips

## **SECTION 8**

# **ANALYSIS OF ECONOMIC FEASIBILITY**

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## SECTION 8. ANALYSIS OF ECONOMIC FEASIBILITY

Unlike Phase I of The Oaks at Moore's Creek, the proposed Phase II must include the design, permitting and construction of a new roadway, extension of water, sewer and other utilities and installation of a storm drainage system as well as extensive land clearing and pad preparation. It also includes installation of sidewalks, streetlights, and street trees along the new roadway, and pedestrian connection from the new sidewalks to the Moore's Creek Linear Park. Construction of these infrastructure improvements give the ability and sets the stage for construction of new homes. Consequently, there are significant additional costs that must be absorbed into the economic equation of Phase II that were not part of Phase I. These costs are estimated at approximately \$35,000 per lot and a total of \$525,000. This estimate assumes soil conditions are suitable for the development, and no major soil remediation work is needed.

Construction of the individual single-family homes is expected to cost approximately \$115 per gross square foot. This estimate includes all hard and soft costs as well as permit, and impact fees. Based on the square footages proposed, the cost to construct the individual homes will range from approximately \$175,000 to \$270,000, not including Davis-Bacon wage rates. With the addition of the cost to develop the land, the total per unit cost is estimated to range from \$210,000 to 305,000, and the total project cost is estimated to be approximately \$3,775,000.

According to the St. Lucie County Property Appraiser records, in 2009 sales for Phase I units ranged from a low of \$128,000 to a high of \$150,000. Research on [www.zillow.com](http://www.zillow.com) did not reveal any new home sales in the area and thus there are no current comparables on which to base a potential sales price for the proposed Phase II homes. Actual sales price will be determined by an appraisal conducted by the institution that provides the first mortgage financing prior to closing on that financing, and will likely be adjusted through soft-second mortgages and downpayment assistance so that they are affordable to low- and moderate-income buyers. Consequently, the sales prices can only be estimated at this time.

Assuming sales prices averaging at the high end of Phase I sales (\$150,000), for fifteen (15) homes the total sales revenue would be projected at \$2,250,000 which is \$1,525,000 less than the cost. As a result, the project is not feasible without significant subsidy as previously stated in the cover letter. Furthermore, these estimates do not include the cost of land. Obviously, the figures used in this section are estimates, and actual costs and revenues could be higher or lower than estimated.

**SECTION 9**

**PROPOSED FINANCING PLAN**

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## SECTION 9. PROPOSED FINANCING PLAN

Stuart & Shelby Development proposes to partner with the City and Redevelopment Agency to obtain the funding necessary to construct the project. Funding will fall into four (4) basic categories as follows:

- Cost to acquire the property. This proposal is for the Redevelopment Agency to retain ownership of the land until the point of sale, thus reducing the project cost
- Cost to construct the infrastructure and develop the subdivision in preparation for home building, and is estimated at approximately \$525,000. This includes clearing of trees, stripping of land, importing fill, water, sewer drainage, paving and sidewalks. This does not include any soil remediation if needed. We have prepared our preliminary site plan which is attached, and we have received estimates for all site work anticipated.
- Cost to construct the homes, which is estimated at \$3,250,000. This estimate does not include Davis-Bacon wage rates, which would increase cost by approximately 7-8% if required.
- Cost for homebuyers to acquire the homes, and although estimated at \$2,250,000, the actual cost will depend upon the appraised value of the homes when completed.

As noted in Section 8 of this proposal, the estimates for project cost exceed those of project revenue by approximately \$1,525,000, consequently conventional project financing will not work and a subsidy of public funds is required for construction of infrastructure and homes. This represents a significant investment in this neighborhood on the part of the City and Redevelopment Agency, and requires the acquisition of revenue sources the purpose of which is to develop affordable housing for low- and moderate-income homebuyers, and which results in the correction of conditions of blight.

Potential funding sources include the following:

- Donation of land to the project
- CDBG for infrastructure including the currently budgeted \$100,000
- Private construction loan for home building, however interest charges will increase the project cost
- Tax increment revenues could be used for a short-term to build the homes and repaid by sales proceeds, however all TIF funds are currently appropriated to operating or debt service, or other projects, and sales prices are not expected to cover the cost to construct homes
- City funds might also be used for a short-term to build the homes and repaid by sales proceeds, however the sales prices are not expected to cover the cost to construct the homes
- SHIP funds for downpayment assistance
- Soft-second mortgages to ensure affordability to income-qualified low- and moderate-income homebuyers
- Conventional first mortgage financing from local lenders

Additional sources of funds will need to be identified in order to construct the require infrastructure and homebuilding. There were no other obvious sources in the City's budget for capital improvements, nor in the Redevelopment Agency's budget due to debt service costs, so there is a need to re-appropriate funds from other sources in order to implement this project. The Stuart & Shelby Development team will work with the City and Redevelopment Agency staff to finalize a funding strategy during the first months of the project.

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**SECTION 10**

**PROPOSED ACQUISITION TERMS**

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## SECTION 10. PROPOSED ACQUISITION TERMS

Because the estimated project costs exceed estimated revenues, Stuart & Shelby Development proposes that the property remain in public ownership throughout development and construction, and we do not propose acquiring title. By retaining ownership of the property through development and construction, the City/CRA can sell directly to an income-qualified low- to moderate-income homebuyer, can offer downpayment assistance as well as soft second-mortgages if needed. In this manner, any public subsidy funds go directly to the homebuyer, and not to the developer.

## **SECTION 11**

# **PROPOSED PROJECT SCHEDULE**

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## SECTION 11. PROPOSED PROJECT SCHEDULE

- Months 1-6
  - Finalize project financing strategy, and seek other sources of funds for infrastructure construction
  - Homebuyer outreach
  - Design and permitting of infrastructure
  - Subdivision platting/re-platting

At completion of infrastructure permitting, and once a pool of potential homebuyers is assembled, the next stage of the project will commence
- Months 7-10
  - Infrastructure Construction
  - Homebuyer qualification and counseling
  - Final design and permitting of homes

At completion of infrastructure construction and homebuyer qualification and counseling, buyers will be required to sign contracts for specific homes, and construction financing will be secured

  - If permitted by the City, models would be construction concurrent with the infrastructure for marketing purposes
- Months 10-18
  - Homebuilding will be completed in phases with approximately 3-4 homes being built at a time
  - Upon completion of construction and issuance of Certificate of Occupancies by the City, home will close and transfer to the income-qualified and/or first-time homebuyer

**SECTION 12**

**W/MBE PARTICIPATION**

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## SECTION 12. M/WBE PARTICIPATION

Stuart & Shelby Development selects subconsultants and subcontractors based on qualifications and pricing of the respective firms and does not discriminate in any way. Emphasis is on quality of subcontractors work to ensure quality construction. Stuart & Shelby Development also makes it a practice of reaching out to local vendors and has a history of hiring minority and women owned business enterprises as well as small business enterprises. In addition, the team has experience complying with local preferences, and goals for minority and women owned businesses.

In the Lake Worth NSP 2 project, Stuart & Shelby Development implemented a local outreach program to comply with HUD Section 3 requirements. In Hallandale Beach, Stuart & Shelby Development implemented a community benefit / local vendor preference program. In both cases, a list of licensed local contractors was obtained and all local vendors were asked to provide a bid. In Hallandale Beach, local vendor workshops were held and bids requested from that list of vendors. Also, any qualified local contractor whose bid was within a percentage threshold of the low-bid was offered the work. Stuart & Shelby mentored several local subcontractors in Hallandale Beach to enable them to obtain insurance and proper licensing. Paul A. Jackson Plumbing in Hallandale Beach is one of the local firms used on that project and is provided as a reference for Stuart & Shelby, at 954-456-0851.

In Fort Pierce, Stuart & Shelby will obtain the list of licensed local vendors, will hold vendor workshops and mentor subcontractors as needed and appropriate. We will also agree to accept a local and/or W/MBE firm whose bid is within 3% of the low bid for that particular trade. If CDBG funds are used for this project, we will also counsel local, small business and W/MBE firms to ensure that they can comply with the hiring and administrative requirements assuming Davis-Bacon requirements must be met. Also, if Davis-Bacon wages rates must be complied with, the total project cost may increase.

**SECTION 13**

**BUSINESS TAX RECEIPTS**

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STATE OF FLORIDA  
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION  
CONSTRUCTION INDUSTRY LICENSING BOARD



<b>LICENSE NUMBER</b>	
CGC35842	

The GENERAL CONTRACTOR  
Named below IS CERTIFIED  
Under the provisions of Chapter 489 FS.  
Expiration date: AUG 31, 2016

HALBERG, CHARLES GORDON  
STUART & SHELBY DEVELOPMENT INC  
205 GEORGE BUSH BLVD  
DELRAY BEACH FL 33444



**CITY OF DELRAY BEACH**

62206

**BUSINESS TAX RECEIPT  
& CONTRACTOR REGISTRATION**

**RESTRICTION:**

OWNER/QUALIFIER: HALBERG, CHARLES GORDON  
BUSINESS NAME: STUART & SHELBY DEVELOPMENT  
LOCATION: 205 GEORGE BUSH BLVD  
CLASSIFICATION: CONTRACTOR-GENERAL

RECEIPT NO 15 00045453  
CONTROL NO 131904  
DATE ISSUED: 8/26/14  
BUSINESS TAX FEE: 172.61  
DELINQUENT FEE: .00  
TRANSFER FEE: .00

**TOTAL AMOUNT PAID: 172.61**

STUART & SHELBY DEVELOPMENT  
INC  
205 GEORGE BUSH BLVD  
DELRAY BEACH FL 33444

BUSINESS TAX RECEIPT ISSUED FOR THE PERIOD  
OCTOBER 1 2014 TO SEPTEMBER 30 2015

**BUSINESS TAX RECEIPT MUST BE  
CONSPICUOUSLY DISPLAYED TO  
PUBLIC VIEW AT BUSINESS LOCATION**

*Notice: This business tax receipt becomes NULL and VOID if ownership, business name, or address is changed. Applicant must apply for Transfer.*



**ANNE M. GANNON**  
CONSTITUTIONAL TAX COLLECTOR  
Serving Palm Beach County

P.O. Box 3353, West Palm Beach, FL 33402-3353  
www.pbctax.com Tel: (561) 355-2264

**\*\*LOCATED AT\*\***

205 GEORGE BUSH BLVD  
DELRAY BEACH, FL 33444-4034

*Serving you.*

TYPE OF BUSINESS	OWNER	CERTIFICATION #	RECEIPT #/DATE PAID	AMT PAID	BILL #
23-0051 GENERAL CONTRACTOR	HALBERG CHARLES	CGC35842	U14.692271 - 08/20/14	\$27.60	B40168847

This document is valid only when received by the Tax Collector's Office.

B1 - 533

STUART & SHELBY DEVELOPMENT INC  
STUART & SHELBY DEVELOPMENT INC  
205 GEORGE BUSH BLVD  
DELRAY BEACH, FL 33444-4034



STATE OF FLORIDA  
PALM BEACH COUNTY  
2014/2015 LOCAL BUSINESS TAX RECEIPT

**LBTR Number: 201007457  
EXPIRES: SEPTEMBER 30, 2015**

This receipt grants the privilege of engaging in or managing any business profession or occupation within its jurisdiction and MUST be conspicuously displayed at the place of business and in such a manner as to be open to the view of the public.

FLORIDA DEPARTMENT OF STATE  
DIVISION OF CORPORATIONS



## Detail by Entity Name

### Florida Profit Corporation

STUART & SHELBY DEVELOPMENT, INC.

### Filing Information

<b>Document Number</b>	P06000127551
<b>FEI/EIN Number</b>	205645224
<b>Date Filed</b>	10/03/2006
<b>State</b>	FL
<b>Status</b>	ACTIVE
<b>Effective Date</b>	10/03/2006

### Principal Address

205 GEORGE BUSH BLVD  
DELRAY BEACH, FL 33444

Changed: 02/01/2010

### Mailing Address

205 GEORGE BUSH BLVD  
DELRAY BEACH, FL 33444

Changed: 02/01/2010

### Registered Agent Name & Address

HALBERG, CHARLES G  
4870 S. CLASSICAL BLVD.  
DELRAY BEACH, FL 33445

Name Changed: 02/11/2007

### Officer/Director Detail

#### **Name & Address**

Title P

HALBERG, CHARLES G  
4870 S. CLASSICAL BLVD.  
DELRAY BEACH, FL 33445

Title V

NEVILLE, WILLIAM

509ANCHORAGE DRIVE  
 N. PALM BEACH, FL 33408

Title S

MC GOVERN, CHARLES  
 68 LEGACY COURT  
 DELRAY BEACH, FL 33445

**Annual Reports**

Report Year	Filed Date
2012	04/02/2012
2013	04/13/2013
2014	03/01/2014

**Document Images**

<a href="#">03/01/2014 -ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">04/13/2013 -ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
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State of Florida, Department of State

**SECTION 14**

**PURCHASING CARD PROGRAM**

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# STUART & SHELBY DEVELOPMENT- GENERAL CONTRACTORS

## SECTION 14. PURCHASING CARD PROGRAM

Stuart & Shelby Development will accept the policy of Net 30 Days After Receipt of Invoice (ARI).

**SECTION 15**  
**REQUIRED FORMS**

<b>DELIVER TO:</b> City of Fort Pierce 100 North U.S. #1 Fort Pierce, FL 34950  <b>MAIL TO:</b> City of Fort Pierce Procurement Dept. P.O. Box 1480 Fort Pierce, FL 34954-1480	<b>REQUEST FOR PROPOSALS</b>  <b>And</b>  <b>PROPOSAL ACKNOWLEDGMENT</b>
<b>Contact:</b> Gelencia Carter, 772-467-3749	<b>RFP No:</b> 2015-027
<b>Pre-Proposal Conference Date:</b> N/A	<b>RFP Title:</b> OAKS AT MOORE'S CREEK REDEVELOPMENT ~ PHASE II
<b>Pre-Proposal Location:</b> N/A	<b>RFP Opening Location:</b> City of Ft. Pierce Procurement Dept. 100 North U.S. #1, 1st Floor Ft. Pierce, Florida 34950
<b>RFP Due Date &amp; Time:</b> 3:00PM, THURSDAY, JANUARY 22, 2015	If you need any reasonable accommodation for any type of disability in order to participate in this procurement, please contact this department as soon as possible.
<b>Proposer Name:</b> Stuart & Shelby Development, Inc. -----  <b>Mailing Address:</b> 205 George Bush Boulevard ----- ----- -----	<i>I hereby certify that this proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a bid for the same materials, supplies or equipment, and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this bid and certify that I am authorized to sign this proposal for the proposer.</i>  X  Authorized Signature (Manual)
<b>City, State, Zip Code:</b> Delray Beach, FL 33444	<b>Typed or Printed Name:</b> Charles G. Halberg
<b>Type of Entity (Circle One):</b> <input checked="" type="radio"/> Corporation <input type="radio"/> Partnership <input type="radio"/> Proprietorship	<b>Title:</b> President
<b>Incorporated in the State of:</b> Florida <b>Year:</b> 2006	<b>Delivery in _____ days, ARO</b> N/A
<b>Phone Number:</b> 561-637-7902	<b>Payment Terms:</b> Net 30 Days
<b>Fax Number:</b> 561-637-7904	<b>FEIN or SS Number:</b>
<b>E-Mail Address:</b> chuckh@stuartandshelby.com	<b>Local Business:</b> ___Y <input checked="" type="checkbox"/> ___N <b>MWBE:</b> ___Y <input checked="" type="checkbox"/> ___N
<b>Bid Security is attached, when required, in the amount of \$</b> _____ Not applicable <b>F.O.B. DESTINATION</b>	<b>If returning as a "No Bid" state reason:</b>
<b>THIS PAGE MUST BE COMPLETED AND RETURNED WITH YOUR BID</b>	

V. DECLARATION OF INTEREST

Each respondent shall execute a Declaration of Interest in substantially the following form:

The undersigned, as Respondent, declares that the only persons interested in this Proposal submitted in response to this Request for Proposals are named herein, that no other person or entity has any interest in this Proposal, it is submitted without connection or arrangement with any other person and that this Proposal is true and correct and is in every respect fair, in good faith, and without collusion or fraud.

The Respondent further declares that he/she/it has complied in every respect with all of the instructions to respondents, that he/she/it has read the Request for Proposals and any addenda [which addenda shall be listed in the declaration] which may be issued and that he/she/it has satisfied himself/herself fully with regard to all matters and conditions with respect to the Proposal.

Stuart & Shelby Development, Inc.

Name of Firm, Individual or Corporation



Signature

Charles G. Halberg, President

(Title)

Signature

(Title)

Signature

(Title)

Signature

(Title)

**DRUG-FREE WORK PLACE FORM**

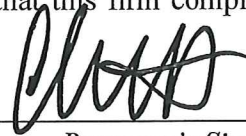
The undersigned vendor in accordance with Florida Statute 287.087 hereby certified that  
Stuart & Shelby Development, Inc.

does:

*(Name of Business)*

1. 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.
2. 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 drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are proposed a copy of the statement specified in subsection (1).
4. 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.
5. 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.
6. 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 firm complies fully with the above requirements.



*Proposer's Signature*

1/19/15

*Date*

**Request for Taxpayer  
 Identification Number and Certification**

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

Name (as shown on your income tax return)  
**STUART & SHELBY DEVELOPMENT, INC**

Business name, if different from above

Check appropriate box:  Individual/sole proprietor  Corporation  Partnership  
 Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶ .....  Exempt payee  
 Other (see instructions) ▶

Address (number, street, and apt. or suite no.)  
**205 GEORGE BUSH BLVD**

City, state, and ZIP code  
**DELCRAY BEACH, FL 33444**

Requester's name and address (optional)

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 your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note, if the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Social security number

or


Employer identification number  
**205615224**

**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).

**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 on page 4.

Sign Here Signature of U.S. person ▶  Date ▶ **1/19/15**

**General Instructions**

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

**Purpose of Form**

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

**Note.** If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,



# CITY OF FORT PIERCE PROPOSER'S CHECKLIST



This checklist is provided to assist each Proposer in the preparation of their proposal response. Included in this checklist are important requirements, which is the responsibility of each Proposer to submit with their response in order to make their response fully compliant. This checklist is only a guideline~ it is the responsibility of each Proposer to read and comply with the Request for Proposals in its entirety.

**Check "Yes" or "No" to each of the following:**

	YES	NO
Is Request for Proposals cover page (page 1) completed, signed and attached?	x _____	_____
Include proof of proper licensing as stated in proposal documents.	x _____	_____
Proposals envelope is marked accordingly.	x _____	_____
Is Drug-Free Workplace form signed and enclosed (if applicable)	x _____	_____
Is Declaration of Interest form signed and enclosed	x _____	_____
Are six (6) complete proposal packages included (one original and five copies) ?	x _____	_____
Is each Addendum (when issued) signed and included?	x _____	_____

**PLEASE SIGN AND RETURN WITH PROPOSAL**

  
 \_\_\_\_\_  
 Charles G. Halberg, President