



THE SUNRISE CITY  
**FORT PIERCE**  
PURCHASING  
DEPARTMENT

Florida

TO: Audria Moore-Wells, Special Projects Coordinator

THROUGH: Gelencia Carter, Purchasing Manager

FROM: Georgia Montgomery, Purchasing Agent

SUBJECT: **RFP No. 2020-031 ~ Oaks at Moore's Creek Redevelopment-Phase II**

DATE: August 21, 2020

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Attached is the tabulation sheet for the above referenced proposal. Two submittals were received via email and will be sent via email. The file is available for review in the Purchasing Division.

**The invitation was sent to 650 vendors. Twenty- Four (24) vendors requested specifications with two (2) responding (8.33%) 0 "No Bid" (8.33% total response).**

The next step in this process is to meet with the Purchasing Manager to determine members of the Evaluation Committee, assign roles, and issue copies of all proposals. The following are roles that need to be assigned, if applicable to the project scope of work:

1. **Team Leader:** Sets up team, coordinates strategies, sets timetables, assigns roles.
2. **Project Manager:** Person or representative from department involved in service.
3. **Financial Analyst:** Price and Cost Analyst to compare proposals and check financial data.
4. **Technical Advisor(s):** References, licensing, background checks, local preference, etc.
5. **Committee Member:** Evaluates the solicitation and will cast a vote.

As the end user department for this proposal, you would assume or assign the role as Team Leader. A representative from Purchasing, will serve as the *Committee Liaison*, and should be present for the meetings, including the initial start-up meeting.

Please respond to the Purchasing Division (copy to Director of Finance) for recommendation of award **prior** to the Agenda Quick phase.

Expiration date is **October 16, 2020** and Commission approval must be completed by this date.

/gm

Attachment

cc: Johnna Morris, Director of Finance (Memo only)  
File



**CITY OF FORT PIERCE  
 TABULATION OF BIDS**

"Offers from the vendors listed herein are the only offers received timely as of the above opening date and time. All other offers submitted in response to this solicitation, if any, are hereby rejected as late."

<b>RFP ON:</b>	<b>Oaks at Moore's Creek Redevelopment - Phase II</b>
<b>RFP NUMBER:</b>	<b>2020-031</b>
<b>DATE:</b>	08/18/20
<b>RECOMMENDED AWARD:</b>	Pending

<b>RESPONSE</b>
2 of 24 = 8.33 %
0 "No Bids"
Total = 8.33 %

<b>PROPOSER</b>
Coastal Waste & Recycling, Inc. <i>Stuart, FL</i>
Stuart & Shelby Development & East to West Development <i>Delray, FL</i>

**PLEASE NOTE: COMMISSION MEETINGS ARE HELD THE FIRST AND THIRD MONDAY OF EVERY MONTH. CALL THE PURCHASING DEPARTMENT WEDNESDAY PRIOR TO THE MEETINGS FOR RECOMMENDATION OF AWARD.**



## Proposal for Business

August 4, 2020

### **Jobsite: Oaks at Moores Creek Redevelopment Phase II**

Coastal Waste & Recycling is South Florida's largest privately owned, locally operated solid waste disposal and recycling company. Coastal prides itself on quick service ensuring your site never goes idle because of waste removal not being handled in a timely fashion. We understand the need to know how much you are really paying for these types of services, we approach billing with the simple to read invoice – no delivery fees, fuel surcharges, administrative fees, or environmental fees; you pay one dump fee. We offer local operations support based out of one of our eight local offices and hands on account personnel who can discuss what will add the most value to your service.

### **Pricing**

#### **C&D Dumpster**

- 10 yd roll off \$275.00
  - 2 ton cap, \$50/additional tons
- 20 yd roll off \$375.00
  - 4 ton cap, \$50/additional tons
- 30 yd roll off \$475.00
  - 6 ton cap, \$50/additional tons
- 40 yd roll off \$575.00
  - 8 ton cap, \$50/additional tons

#### **Clean Concrete**

- 20 yd roll off \$350.00
  - No weight cap  $\frac{3}{4}$  Fill Cap
  - If concrete container is contaminated (contains anything else besides concrete) costing defaults to mixed debris pricing

### **Job Notes**

- Typically, 24-Hour Windows/ or Next Day Service.
- No Delivery Charges
- No Energy/Fuel Surcharges - NO ADDED FEES
- Direct Access to Operations and Sales
- You May Customize Your Weight/Pricing Based on Your Needs
- \$150 Relocation Fees

We are accustomed to serving large builds, working with current clients such as D.R. Horton, Stiles Construction, Mattamy Homes, Miller Construction, and Synergy Homes. We offer grapple services, and portable toilet routes coming soon into Martin/St. Lucie counties. If you have any questions or comments, please reach out to me anytime.

Thank you,

Max Lally  
772-341-9994

**STUART & SHELBY DEVELOPMENT  
&  
EAST TO WEST DEVELOPMENT**

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**City of Fort Pierce  
Redevelopment Agency**



**Request for Proposal  
No. 2020-031  
Oaks at Moore's Creek  
Redevelopment  
Phase II**

**Proposal Date: Tuesday, August 18, 2020  
3:00 PM**

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## NOTICE TO REVIEWER

This Proposal follows the format reflected on pages 21-23 (Section IV: E - Proposal Format) of the Request for Proposal (RFP). It is noted however, that on page 17 of the RFP (Section IV: 1 – Proposal Format and Submission) a different proposal format is outlined.

To address the apparent contradiction in the instructions for preparing proposals, our team's Proposal follows the format found in Section IV: E – Proposal Format, and incorporates the information outlined on page 17 as part of Section 7: Additional Information (Including Any Addenda).

# STUART & SHELBY DEVELOPMENT- GENERAL CONTRACTORS

## SECTION 1: LETTER OF TRANSMITTAL

Fort Pierce Redevelopment Agency RFP

No. 2020-031

Dear Ft. Pierce Redevelopment Agency:

We are pleased to submit this formal statement of interest in performing the project outlined in your solicitation document. This Proposal is a "re-boot" of our 2015 submission. We were interested then, and we remain interested now. Our team composition, however, has been enhanced to more effectively meet the objectives of the FPRA.

Our team is a collaboration between Stuart & Shelby Development (General Contractor) and its non-profit partner, East to West Development Corporation. This collaboration brings over 75 years of experience in home building/affordable housing development.

Stuart & Shelby Development is an experienced homebuilder and developer whose staff have developed and built over 5,000 single-family homes in Florida 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.

East to West Development Corporation is a 501(c)(3) whose mission is to tackle the Affordable Housing Crisis by building opportunities one house at a time. The Founder and CEO is a former City Manager and CRA Executive Director that has been involved in the development of approximately 10,000 units of affordable housing in his public administration career.

This team has successfully worked together on a previous redevelopment agency project and possesses the skill sets to effectively and efficiently develop phase II of the Oaks at Moore's Creek. For purposes of this RFP, the point of contact will be:

Corey O'Gorman, Director of Development  
East to West Development Corporation  
700 US Highway One, Suite C  
N. Palm Beach, FL 33408  
(561) 801-2461 E-Mail: [corey@etwdc.org](mailto:corey@etwdc.org)

We look forward to the opportunity to partnering with the Ft. Pierce Redevelopment Agency in advancing its affordable housing goals.

Sincerely,



Chuck Halbert, President  
Stuart & Shelby Development

217 NE 4<sup>th</sup> Street, Delray Beach, FL 33444

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

## SECTION 2: COMPANY BACKGROUND & TEAM ARRANGEMENT

### **Company Name & Address:**

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

East to West Development Corporation  
700 US One, Suite C  
North Palm Beach, FL 33408

### **Year Established:**

Stuart & Shelby: 2006

East to West: 2018

### **Type Ownership & Parent Company:**

Stuart & Shelby: Privately Held

East to West: Non-Profit – 501 (c) 3

### **Manager Responsible:**

Stuart & Shelby: Chuck Halberg, President

East to West: Daniel Rosemond, CEO

### **Proof of Financial Solvency:**

Stuart & Shelby is financially solvent and is hereby providing a letter showing its bonding capacity (see below). As a result of Proposals for public entities being subject to public records requests, we can provide commitment letters from our lender during the contract negotiation stage.



**NHC** NIELSON, MOSHOLDER & ASSOCIATES

August 13, 2020

City of Fort Pierce  
Purchasing Division – Rm 101  
100 North U.S. #1  
Fort Pierce, FL 34950

Re: Stuart & Shelby Development, Inc.

To Whom it May Concern;

This letter is to serve as a general Statement of Bondability for **Stuart & Shelby Development, Inc.** Based upon normal and standard underwriting criteria at the time of the request, we should be in a position to provide Performance and Payment bonds on this account up to **\$5,000,000.00** single with a total aggregate program of **\$8,000,000.00**.

They are currently bonded through Merchants National Bonding, Inc. The Surety Company has an AM Best Rating of A VIII.

**Stuart & Shelby Development, Inc.** is an excellent contractor and we hold them in the highest regard. Obviously, we feel extremely confident in our contractor and encourage you to offer them an opportunity to show the quality and professionalism they possess.

This letter is not an assumption of liability, nor is it a bid or performance & payment bond. It is issued only as a bonding reference requested by our respected client. If you should have any questions, please do not hesitate to give me a call

Sincerely,  
  
Don Bramlage  
Surety Bond Specialist

SMART, UNCOMPROMISING, TIMELY, EFFECTIVE. NIELSON, MOSHOLDER & COMPANY, INC. SURETY SOLUTIONS THAT MAKE A DIFFERENCE.

4380 St. Johns Parkway  
Suite 110  
Sanford, FL 32771  
P: 407.330.3990  
F: 407.330.3147  
[www.nielsonbonds.com](http://www.nielsonbonds.com)

Core Competencies of the Company:

Stuart & Shelby's core competency is residential construction. East to West Development Corporation's core competency is affordable housing development.

A joint venture is not necessarily contemplated for this project. Stuart & Shelby will serve as the Prime Contractor and assume all responsibility for the entire project. Stuart & Shelby will engage subcontractors for the various trades.

Should there be an advantage to the FPRA to enter into agreement with a non-profit developer (instead of a for profit builder), the principals of both Stuart & Shelby and East to West Development Corporation have agreed that in that instance, ETWDC will function as Prime Contractor.

## SECTION 3: REFERENCE REVIEWS



August 7, 2020

To Whom It May Concern:

Adopt-A-Family of the Palm Beaches, Inc. has been fortunate to have a long-term relationship with Stuart & Shelby Development and have collaborated with them on three projects to develop affordable housing for homeless and low-income families.

In 2008, Stuart & Shelby constructed nine two- and three-bedroom townhouses dedicated to homeless families. The Florida Redevelopment Association awarded this development the "Best Affordable Housing Project" in 2009. Again, we collaborated with Stuart and Shelby to develop forty-one units of affordable housing dedicated to serving low-income families in Lake Worth. The work involved in this project included a variety of development scenarios – new construction, significant rehab, and moderate rehabs. To this day, these units continue to house low-income families in our community.

We teamed up with Stuart & Shelby for the development of our Third Avenue Homes program. This project, completed in June 2020, consists of fourteen two-, three- and four- bedroom townhomes. The families for this program will be referred by our sister elementary school, Highland Elementary. Highland has the highest rate of homeless children in Palm Beach County. This innovative program will follow the children throughout their education and monitor the correlation between housing stability and education.

Stuart & Shelby not only take pride in their development endeavors, they support our agency's mission and are committed to helping homeless and low-income families.

It is without reservation that I highly recommend Stuart and Shelby for any housing development opportunities. Please do not hesitate to contact me if you would like additional information.

Sincerely,

A handwritten signature in blue ink that reads "Matthew Constantine".

Matthew Constantine  
Chief Executive Officer



*Leaders in helping families help themselves.*

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





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**Chuck West**

**Executive Director**  
**Evelyn S. Dobson**

**Liaison**  
**City Commissioner**  
**Shelly Petrolia**

July 8, 2014

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



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**Derrick Penn**  
CLT Lessee Member

**Randy J. Metzger,**  
P.E.  
Engineer and  
Associate

**Sandra Young**  
CLT Lessee Member

August 6, 2020

To whom it may concern,

Over the last several years, the Community Land Trust of Palm Beach County has had the pleasure of working with Stuart and Shelby to complete various housing development projects over the last several years. These projects include Davis Landings West, a 24 unit single family and townhome community and Kirk Road CLT homes which is comprised of four single family homes and a duplex. We have yet again engaged Stuart and Shelby to complete Phase II of the Kirk Road CLT Homes project and a single family home to be constructed in Lake Worth.

We highly recommend Stuart and Shelby. Their commitment to quality, integrity, work ethic, and enthusiasm are cornerstones of the work they do.

Please feel free to reach out to me directly by phone at 561.318.8430 or e-mail at [clacourse-blum@cltofabc.org](mailto:clacourse-blum@cltofabc.org) if further information is needed.

Sincerely,

A handwritten signature in blue ink, appearing to read "Cindee", written over a light blue horizontal line.

**Cindee LaCourse-Blum**  
Executive Director

4938 LAWS ROAD • LAKE WORTH, FLORIDA 33461  
Phone: (561) 318-8842  
<http://cltofabc.org>



HATCH 1 1 2 1 Lucerne Ave. | Lake Worth, FL 33460

LakeWorthCRA.org

August 7, 2020

Re: Letter of Recommendation: Stuart & Shelby Development

To Whom It May Concern:

The Lake Worth Beach Community Redevelopment Agency (CRA) has proudly contracted with Stuart & Shelby Development since 2009. Since that time, Stuart & Shelby has been a strong partner in helping the CRA meet all of our development and construction service's needs. Stuart & Shelby has constructed numerous single-family homes and multi-family developments for the CRA.

It has been a true pleasure working with Chuck Halberg and his entire staff and I have nothing but high praise for their work ethic, enthusiasm and dedication to providing quality construction on all of their projects. They are very familiar with the requirements and regulations related to development in our County and with all procedures in City and State government.

I would recommend Stuart & Shelby to both public and private sector clients seeking construction services. If you would like further information regarding the firms' work with our agency please do not hesitate to contact me at (561) 493-2550 or [joliva@lakeworthbeachfl.gov](mailto:joliva@lakeworthbeachfl.gov).

Sincerely,



Joan Oliva  
Executive Director  
Lake Worth Beach CRA



August 12, 2020

To whom it May Concern:

The Hallandale Beach Community Redevelopment Agency (HBCRA) is fortunate to have had the opportunity to partner with the 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.

HBCRA, under the second phase of the infill housing project, awarded an additional six homes to Stuart and Shelby in 2015. Stuart and Shelby delivered the units, both times, on time and according to budget.

The HBCRA experience with Stuart and Shelby has been a very positive one. Chuck Halberg and his team handled the construction of all fourteen homes with a high level of professionalism. Stuart and Shelby's team were very responsive to needs of the Agency and genuinely cared about the end users of the housing program. Chuck Halberg and his team don't just say they "build with integrity and pride", they put it into action.

The HBCRA highly recommends Stuart and Shelby Development for any housing development opportunities and would be happy to provide additional information if required.

Sincerely,

A handwritten signature in blue ink, appearing to read "Lovern Parks", is written over the word "Sincerely,".

Lovern Parks  
CRA Residential Program & Real Estate Manager  
[Lparks@hallandalebeachfl.gov](mailto:Lparks@hallandalebeachfl.gov)



August 5, 2020

**TO WHOM IT MAY CONCERN:**

The Delray Beach Community Redevelopment Agency (CRA) has worked with Stuart and Shelby Development on several construction projects over the years to aid us in our mission of eliminating slum and blight. 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
- Construction of 10 single family workforce housing homes (In progress)

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 (561) 276-8640.

Sincerely,

A handwritten signature in black ink, appearing to read "Renée A. Jadus Singh".

Renée A. Jadus Singh, Esq.

20 North Swinton Ave  
Delray Beach, FL 33444

561-276-8640

[info@cra@mydelraybeach.com](mailto:info@cra@mydelraybeach.com)

[delraycra.org](http://delraycra.org)

## SECTION 4: VENDOR HISTORY

Stuart & Shelby has been in business since 2006 and has not experienced any terminations for default.

ETWDC has been in business since 2018 and is a registered charitable organization with the Federal Internal Revenue Service. They have not experienced any terminations for default.

## SECTION 5: METHODOLOGY

Our team has read the RFP and has a firm understanding of the Scope of Services desired by FPRA. Moreover, we have read the addendum responding to our submitted questions.

The Ft. Pierce Redevelopment Agency seeks a Developer to build and sell affordable housing units on Agency owned land known as the Oaks at Moore's Creek. This (phase II) project follows the first phase of the development, where 12-single family homes were built and sold to income eligible, first-time homebuyers. The FPRA has not yet determined if it will convey/sell the land to the successful Proposer, or if it plans to retain ownership of the land and enter into a Development Agreement (DA) with the successful Proposer.

Notwithstanding the factors to be determined, the general implementation process being proposed is as follows:

- Secure bid award and execute Development Agreement
- Conduct pre-development activities (platting, site plan approvals, utilities service, etc.)
- Construct 2 homes to serve as models and begin pre-construction screening/sales & marketing
- Once commitments for 60% (or 9 housing units) are obtained, commence construction on those units and continue screening/sales & marketing process for the remaining 6 units
- Complete construction, close on units, and provide affordability report to FPRA

It should be noted that this implementation process is general and will be updated based on negotiated deal points.

The Stuart & Shelby/ETWDC team understands that the main services to be completed include, but are not limited to the following:

1. Planning/Site Development
2. Residential Construction
3. Affordable Housing Screening and Eligibility Determination
4. Buyer Financing and Subsidy Layering

As mentioned in the transmittal letter, our team possesses the knowledge, skills, and experience in each of these main areas to ensure the completion of a successful project.

Our team's strategy is to work collaboratively with the City of Ft. Pierce and the FPRA to ensure that Phase II of the Oaks at Moore's Creek satisfies all city site and neighborhood development requirements.

Moreover, should there be an opportunity to garner county, state, or federal grant funds for items such as infrastructure, ETWDC's non-profit status can serve as a vehicle to aid the Redevelopment Agency in accessing CDBG or other funding types.

## SECTION 6 VENDOR IMPLEMENTATION

- **Major Tasks:**

The major tasks in this project have been outlined in section 5 of this proposal but are provided here as well. They are as follows:

1. Planning/Site Development
2. Residential Construction
3. Affordable Housing Screening and Eligibility Determination
4. Buyer Financing and Subsidy Layering

Our team has the capacity and capabilities in our project pipeline to handle this project. Initially (during the pre-development stage), Corey O'Gorman will be the primary point of contact between our team and the FPRA. As the development progresses and there are multiple facets happening simultaneously, we will designate the appropriate personnel to handle the inquiries and advise the FPRA accordingly. With respect to the provision of an electronic copy of the implementation schedule, our team will fully comply with this request.

- **Risk Management Plan/Approach:**

The Stuart & Shelby Development Team's approach to risk management is fundamentally rooted in proper planning. Identifying and assessing pre-development as well as construction costs early are critical to a successful project. This also involves ensuring sources and uses of funds are secure before activity related to said funding sources is carried out.

- **Configuration Management & Data Management Plan/Approach:**

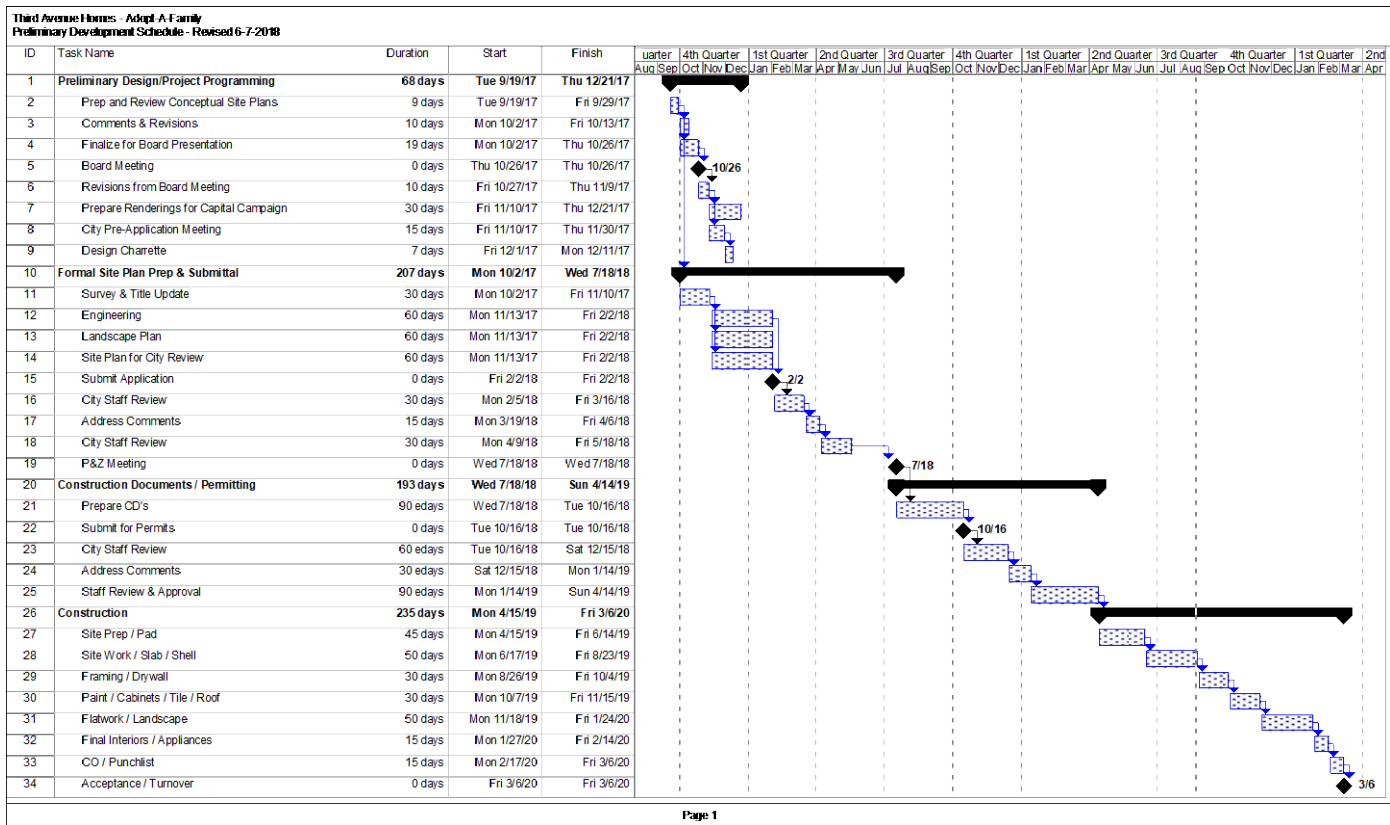
The sites currently owned by FPRA will require site plan approval by the City's planning department. This process will ensure that the proposed use of the site(s) is compliant to city codes and regulations. Once site plan approval is obtained, the next major phase in the development process is securing a Building Permit. Once a Building Permit is secured, construction may commence, and periodic inspections will ensure that proposed housing units are constructed in accordance with Florida Building Codes and local Ft. Pierce building codes.

- **Communications Plan/Approach:**

The Stuart & Shelby Development Team possesses first-hand knowledge of working in partnership with public agencies. Some of the members of our team have been on that side of the table, so we fully understand the importance of a sound communications plan/approach. To that end, we strongly recommend that FPRA identifies a primary point of contact with whom our staff will communicate. This ensures streamlined communication and promotes greater efficiency.

Additionally, our team proposes the use of a project management tool provided by Microsoft Project. Attached is a sample. But this is only a tool. We understand that effective communication involves setting and managing expectations, as well as identifying major project milestones early on. It is also critical to ensure that the project budget and project schedule are developed collaboratively (Stuart & Shelby and FPRA).

Through the project management tool, the Stuart & Shelby Development Team will monitor project progress, meeting notes, and any changes in scope or cost due to additional information or requirements found during the project period.



**Sample: Microsoft Project Worksheet**

- **Performance Monitoring Plan/Approach:**

As stated in the response to the preceding bullet, Microsoft Project will be the tool used to manage project progress, milestones, schedule, and communication. Our goal will be to establish collaborative performance benchmarks with the assigned FPRA staff person and create an effective reporting system that gives the FPRA/City an appropriate level of project information, while not overwhelming staff with details which may not alter major milestones. We would also add that the Development Agreement is anticipated to contain exhibits, one of which will be a project schedule and corresponding draw schedule. Having these elements incorporated in the DA will ensure performance measures are being satisfactorily met.

- **Plan/Approach for Vendor Cost for the Underground Locates “Mechanized Equipment” vs. “Non-Powered hand tools”:**

Upon being selected as the Successful Proposer, our team will negotiate/execute the Development Agreement corresponding to this project. In said agreement, the tasks required to complete the project will be outlined and the responsible party identified (Vendor, City, or Other). Notwithstanding, underground locates is typically performed ‘pre-construction’ and said cost/responsibility is born by the Contractor as part of the Development Agreement.

# SECTION 7: ADDITIONAL INFORMATION

## Drug Free Workplace Form



### DRUG~FREE WORKPLACE 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 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

8-11-2020

Date

**Form W-9**  
 (Rev. November 2017)  
 Department of the Treasury  
 Internal Revenue Service

**Request for Taxpayer Identification Number and Certification**

▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

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

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.  
**Stuart & Shelby Development, Inc.**

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

Individual/sole proprietor or single-member LLC  
 C Corporation  
 S Corporation  
 Partnership  
 Trust/estate  
 Limited liability company. Enter the tax classification (D=C corporation, S=S corporation, P=Partnership) ▶ \_\_\_\_\_

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):  
 Exempt payee code (if any) \_\_\_\_\_  
 Exemption from FATCA reporting code (if any) \_\_\_\_\_

5 Address (number, street, and apt. or suite no.) See instructions.  
**217 NE 4th Street**

6 City, state, and ZIP code  
**Delray Beach, FL 33444**

7 List account number(s) here (optional)

8 Requester's name and address (optional)

**Part I Taxpayer Identification Number (TIN)**

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

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

Social security number  
 \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_


or  
 Employer identification number  
 2 0 - 5 6 4 5 2 2 4

**Part II Certification**

Under penalties of perjury, I certify that:

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

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

Sign Here: Signature of U.S. person ▶  Date ▶ **8-11-2020**

**General Instructions**

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

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

**Purpose of Form**

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

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

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

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



STUAAND-02

CARDOSO

### CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
1/8/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

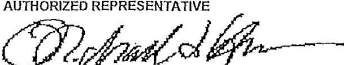
PRODUCER License # 0E67768 Insurance Office of America, Inc. Abacoa Town Center 1200 University Blvd, Suite 200 Jupiter, FL 33458	CONTACT NAME: <b>Ismary Cardoso</b>		
	PHONE (A/C, No, Ext): <b>(954) 556-2772 23927</b>	FAX (A/C, No):	
E-MAIL ADDRESS: <b>Ismary.Cardoso@ioausa.com</b>			
INSURED  <b>Stuart and Shelby Development Inc.</b> <b>217 NE 4th St</b> <b>Delray Beach, FL 33444</b>	INSURER(S) AFFORDING COVERAGE		NAIC #
	<b>INSURER A: American Builders Insurance Company</b>		<b>11240</b>
	<b>INSURER B: Old Dominion Insurance Company</b>		<b>40231</b>
	INSURER C:		
	INSURER D:		
	INSURER E:		

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR			GLP 0018738 13	1/9/2020	1/9/2021	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:						
B	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			B3T5513P	1/9/2020	1/9/2021	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB EXCESS LIAB DED RETENTION \$						
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	WCV 0106765 09	1/9/2020	1/9/2021	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 500,000 E.L. DISEASE - EA EMPLOYEE \$ 500,000 E.L. DISEASE - POLICY LIMIT \$ 500,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER	CANCELLATION  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 

Ron DeSantis, Governor



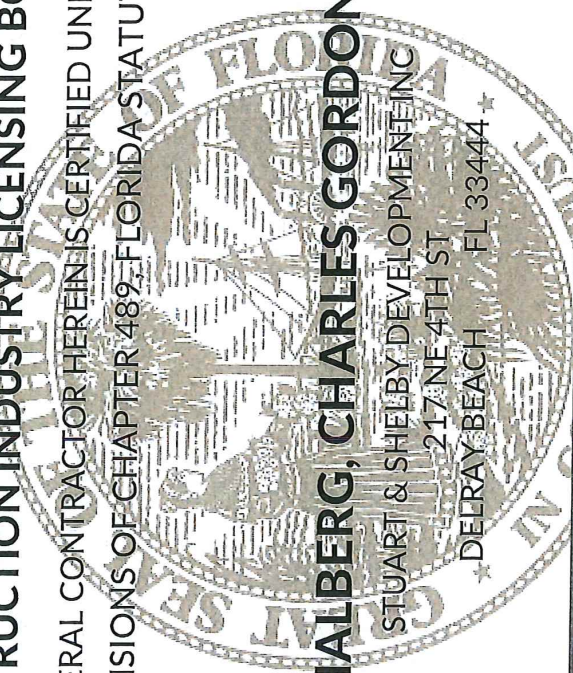
Halsey Beshears, Secretary



STATE OF FLORIDA  
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

CONSTRUCTION INDUSTRY LICENSING BOARD

THE GENERAL CONTRACTOR HEREIN IS CERTIFIED UNDER THE  
PROVISIONS OF CHAPTER 489, FLORIDA STATUTES



**HALBERG, CHARLES GORDON**

STUART & SHELBY DEVELOPMENT, INC  
217 NE 4TH ST  
DELRAY BEACH FL 33444

**LICENSE NUMBER: CGC35842**

**EXPIRATION DATE: AUGUST 31, 2022**

Always verify licenses online at [MyFloridaLicense.com](http://MyFloridaLicense.com)



Do not alter this document in any form.

This is your license. It is unlawful for anyone other than the licensee to use this document.

Business Tax Receipt

**CITY OF DELRAY BEACH**  
BUSINESS TAX RECEIPT  
& CONTRACTOR REGISTRATION

134276

**RESTRICTION:**  
OWNER/QUALIFIER: HALBERG, CHARLES GORDAN  
BUSINESS NAME: STUART & SHELBY DEVELOPMENT IN  
LOCATION: 217 NE 4TH ST  
CLASSIFICATION: CONTRACTOR - GENERAL

RECEIPT NO 21 00064964  
CONTROL NO 150328  
DATE ISSUED: 8/10/20  
BUSINESS TAX FEE: 190.30  
DELINQUENT FEE: .00  
TRANSFER FEE: .00

**TOTAL AMOUNT PAID: 190.30**

BUSINESS TAX RECEIPT ISSUED FOR THE PERIOD  
OCTOBER 1 2020 TO SEPTEMBER 30 2021

**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.

**CITY OF DELRAY BEACH**  
BUSINESS TAX RECEIPT INFORMATION

DATE ISSUED: 8/10/20

BUSINESS TAX RECEIPT ISSUED FOR THE PERIOD  
OCTOBER 1 2020 TO SEPTEMBER 30 2021

- Please conspicuously post this current business tax receipt so that it is able to be viewed by anyone upon entering your place of business.
- This business tax receipt represents proof of payment of your business tax fee for the period October 1 to September 30. Continuous licensure can be an important asset for certain business users; please exercise diligence in maintaining this business tax receipt.
- Once you have obtained a Delray Beach business tax receipt, you will be sent a renewal notice each year 30 to 60 days before expiration to the address indicated on the face of the receipt. Please check all business tax receipt information and if there is an error, report it to us immediately. The City may impose fines and penalties for failure to renew this business tax receipt.
- If you change your business name, ownership or location, you must make a new application for the change and pay a \$16.75 transfer fee. The business tax receipt must be surrendered prior to issuance of the new receipt. The back of the receipt must be signed and dated by the previous owner and indicated that all rights, interest, and title of the business is assigned to the new owner.
- If you have more than one business location, you must obtain a business tax receipt for each location.
- A separate business tax receipt is issued for each use performed within your business. Please check with us if you have any questions regarding the classification of your business by visiting us at 100 NW 1st Avenue, our website at MyDelrayBeach.com, or calling us at (561) 243-7203 ext.4.



Notice: The issuance of this business tax receipt is a result of a payment of the business tax and shall not be interpreted as: permitting the business to supersede the zoning code of the City, an endorsement by the City of a business, nor certification by the City of the competence of a business.

July 24, 2020



**CITY OF FORT PIERCE**

**OAKS AT MOORES CREEK REDEVELOPMENT – PHASE II**

**RFP NO. 2020-031**

**ADDENDUM NO. 1**

The purpose of this addendum is to clarify the **Pre- Bid Conference time** from 3:00 PM., **Wednesday July 29, 2020** which was stated incorrectly in the proposal document to:

**10:00 A.M., WEDNESDAY, JULY 29, 2020**

All other conditions of this bid remain the same.

Please acknowledge receipt of this addendum and include it with your submittal.

Signature:   
Manual

Signature: Charles G. Halberg  
Typed or Printed

Company Name: Stuart & Shelby Development, Inc.

Address: 217 NE 4th Street, Delray Beach, FL 33444

Date: August 11, 2020

/lh

July 27, 2020



CITY OF FORT PIERCE

OAKS AT MOORES CREEK REDEVELOPMENT – PHASE II

RFP NO. 2020-031

ADDENDUM NO. 2

The purpose of this addendum is to offer an audio conference call to developers who want to participate in the pre-bid conference being held 10:00AM, Wednesday, July 29, 2020. If you opt to attend via audio conference, please call the number below and use the access code provided below:

USA Toll Free:  
866-528-2256

Access Code:  
8337520

Calls must be made no later than 9:45AM, to participate in the meeting.

All other conditions of this bid remain the same.

Please acknowledge receipt of this addendum and include it with your submittal.

Signature:   
Manual

Signature: Charles G. Halberg  
Typed or Printed

Company Name: Stuart & Shelby Development, Inc.

Address: 217 NE 4th Street, Delray Beach, FL 33444

Date: August 11, 2020

/gsm

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Addendum No. 2 - RFP No. 2020-031

**August 5, 2020**



**CITY OF FORT PIERCE**

**OAKS AT MOORES CREEK REDEVELOPMENT – PHASE II**

**RFP NO. 2020-031**

**ADDENDUM NO. 3**

The purpose of this addendum is to clarify the proposal due date that is incorrectly stated on page 8, Section II, as 3:00 PM., Thursday August 20, 2020. Proposals are due on or before:

**3:00 P.M., TUESDAY, AUGUST 18, 2020**

All other conditions of this bid remain the same.

Please acknowledge receipt of this addendum and include it with your submittal.

Signature: \_\_\_\_\_

Manual

Charles G. Halberg

Signature: \_\_\_\_\_

Typed or Printed

Stuart & Shelby Development, Inc.

Company Name: \_\_\_\_\_

Address: 217 NE 4th Street, Delray Beach, FL 33444  
\_\_\_\_\_  
\_\_\_\_\_

Date: August 11, 2020  
\_\_\_\_\_

/lh

August 7, 2020



CITY OF FORT PIERCE

OAKS AT MOORES CREEK REDEVELOPMENT – PHASE II

RFP NO. 2020-031

ADDENDUM NO. 4

The purpose of this addendum is to respond to questions submitted by potential proposers for clarification of the proposal specifications:

1. **QUESTION:** Is there existing infrastructure (water, sewer, power) serving the subject property?

**ANSWER:** Water, sewer, gas, and power are available, but not extended to the individual lots.
2. **QUESTION:** Are the individual lots platted or is it currently one large parcel? (note: this will affect development schedule as well as development cost)

**ANSWER:** A preliminary plat was started during the development of Phase I. No final plat was ever completed or filed for the individual lots or street right-of-way. Currently Means Court is a 16' alleyway.
3. **QUESTION:** How were units in Phase I sold? (meaning, was the selected Developer responsible for selling the units or did FPRA handle buyer qualifications and closings?)

**ANSWER:** The CDBG/SHIP Program Manager assisted with the sale of the of the properties and buyer qualifications. The City of Fort Pierce will not be involved with that process for Phase II.
4. **QUESTION:** What were the price points for Phase I?

**ANSWER:** \$110,00 to \$130,00.
5. **QUESTION:** Is FPRA seeking to sell the site or does it intend to convey the site to the successful Proposer? Item 2 of evaluation criteria says, "Proposer must demonstrate capacity to acquire and finance development". We ask that this be clarified as it will significantly impact development approach

- ANSWER:** This decision has not been made yet.
6. **QUESTION:** Is a tree survey available showing existing oaks and slash pines?  
**ANSWER:** No.
7. **QUESTION:** Does FPRA have soil test of the site?  
**ANSWER:** No.
8. **QUESTION:** Can we include the empty lot (parcel # 2409-521-0007-0000) in our Proposal and use it as a site on which to build a model?  
**ANSWER:** No.

All other conditions of this bid remain the same.

Please acknowledge receipt of this addendum and include it with your submittal.

Signature:  \_\_\_\_\_  
**Manual**

Signature: Charles G. Halberg \_\_\_\_\_  
**Typed or Printed**

Company Name: Stuart & Shelby Development, Inc. \_\_\_\_\_

Address: 217 NE 4th Street, Delray Beach, FL 33444 \_\_\_\_\_

Date: August 11, 2020 \_\_\_\_\_

/h

August 11, 2020



CITY OF FORT PIERCE

OAKS AT MOORES CREEK REDEVELOPMENT – PHASE II

RFP NO. 2020-031

ADDENDUM NO. 5

The purpose of this addendum is to provide the correct General Conditions for this RFP. Please disregard the Section 1, page 1 thru 7, of the original document and replace with the attachments.

All other conditions of this bid remain the same.

Please acknowledge receipt of this addendum and include it with your submittal.

Signature: 

Manual

Signature: Charles G. Halberg

Typed or Printed

Company Name: Stuart & Shelby Development, Inc.

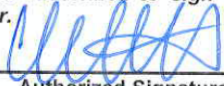
Address: 217 NE 4th Street, Delray Beach, FL 33444

August 11, 2020  
Date: \_\_\_\_\_

/lh

Attachments: General Conditions

Proposal Acknowledgement

<p><b>TO:</b> City of Fort Pierce, Purchasing Division, Room 101 100 North U.S. #1 Fort Pierce, FL 34950</p> <p><b>MAIL TO:</b> City of Fort Pierce Purchasing Division, Room 101 P.O. Box 1480 Fort Pierce, FL 34954-1480</p>	<p><b>REQUEST FOR PROPOSALS and PROPOSAL ACKNOWLEDGMENT</b></p>
<p>Contact: Latonya Hubbard, 772-467-3102</p>	<p>RFP No: 2020-031</p>
<p>Pre- Bid Conference Date:  3:00 PM, WEDNESDAY, JULY 29, 2020</p>	<p>RFP Title: OAKS AT MOORES CREEK REDEVELOPMENT – PHASE II</p>
<p>Pre-Bid Conference Location:  COMMISSION CHAMBERS, 1<sup>ST</sup> FLOOR, CITY HALL, 100 NORTH U.S. 1, FORT PIERCE, FL</p>	<p>Bid Opening Location: Purchasing Division, Room 101 100 North U.S. #1 Ft. Pierce, Florida 34950</p>
<p>Bid Due Date &amp; Time: 3:00 PM, TUESDAY, AUGUST 18, 2020</p>	<p>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.</p>
<p>Bidder Name: Stuart &amp; Shelby Development, Inc.</p> <p>Mailing Address: 217 NE 4th Street</p>	<p><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></p> <p>X  Authorized Signature (Manual)</p>
<p>City, State, Zip Code: Delray Beach, FL 33444</p>	<p>Typed or Printed Name: Charles G. Halberg</p>
<p>Type of Entity (Place a check or X): <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Proprietorship</p>	<p>Title: President</p>
<p>Incorporated in the State of: Florida Year: 2006</p>	<p>Delivery in _____ days, ARO NA</p>
<p>Phone Number: 561-637-7902</p>	<p>Payment Terms: Net 30 Days</p>
<p>Fax Number: 561-637-7904</p>	<p>FEIN or SS Number: 20-5645224</p>
<p>E-Mail Address: chuckh@stuartandshelby.com</p>	<p>Local Business: <input type="checkbox"/> Y <input checked="" type="checkbox"/> N MWBE: <input type="checkbox"/> Y <input checked="" type="checkbox"/> N</p>
<p>Bid Security is attached, when required, in the amount of \$ NA</p> <p style="text-align: center;">F.O.B. DESTINATION</p>	<p>If returning as a "No Bid" state reason:</p>
<p><b>THIS PAGE MUST BE COMPLETED AND RETURNED WITH YOUR BID</b></p>	



## Qualifications & Experience

The Stuart & Shelby Team is comprised of Stuart & Shelby Development (General Contractor) and East to West Development Corporation (non-profit affordable housing developer). This team has over 75 years of combined experience in residential construction, affordable housing development, planning and community redevelopment. Our team is also well versed in understanding and navigating the nuances of working with government entities in achieving redevelopment projects.

- Resumes of Key Personnel

### **STUART & SHELBY DEVELOPMENT TEAM**

#### **Chuck Halberg, President**

- 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
- Has overseen the construction of over 2500 residential single-family units, 2500 apartments, and 800,000 SF of commercial space since 1975
- Personal strengths in business relations, product development, budget management quality control, customer satisfaction
- Delray Beach Business of the Year 2013-2014
- Delray Beach Businessperson of the Year 2010-2011
- Ken Ellingsworth Community Service Award 2008, 2011, 2013,
- Community Service Commendation Delray Beach Police 2006
- Special Recognition Award City of Delray Beach 2006

#### **Dave Dedman, Director of Construction**

- In the construction industry in Florida since 1986
- Managed construction departments for organizations with annual construction budgets in excess of \$20,000,000 including two major Florida developers
- Bachelor of Science in Construction Management
- Personal strengths in budget management, value engineering, product development, quality control

**DANIEL A. ROSEMOND**  
**CEO/FOUNDER**  
**EAST TO WEST DEVELOPMENT CORPORATION**

**EDUCATION**

- |                        |                       |                       |
|------------------------|-----------------------|-----------------------|
| • Master of Science    | St. Thomas University | Public Administration |
| • Graduate Certificate | St. Thomas University | HR Management         |

**DISCIPLINE EXPERIENCE**

- Affordable & Workforce Housing Administration: 15 Years
- Community & Economic Development: 15 Years
- Budgeting, Finance, and Grants Administration: 20 Years
- Public Administration: 30 Years

**NOTABLE ACCOMPLISHMENTS & RELEVANT PROJECTS**

- ✓ Administrative level involvement of funding and oversight of more than 70 affordable housing projects yielding approximately 10,000 units of housing
- ✓ Championed the establishment of new HUD entitlement city, cultivating 10-fold annual funding increase and achieved national recognition from HUD Secretary Shawn Donovan
- ✓ Assumed oversight of an underperforming Redevelopment Agency, and successfully resolved issues stemming from OIG audit
- ✓ Budget preparation and oversight experience well north of \$120M

***ArtSquare, Hallandale Beach (private development)***

A mixed-use development consisting of 10,264 square feet of retail commercial use; 358 residential units, and a 2-story parking garage.

**Cost:** \$80M

**Role:** Negotiated (and administered) Development Agreement on behalf of City/CRA to garner redevelopment of 3 city blocks as part of this project.

***Diplomat, Hallandale Beach (private development)***

Mixed use development providing 938 hotel/condos, new clubhouse, and 30,000 restaurant and retail space on existing golf course.

**Cost:** \$650 M

**Role:** Negotiated (and executed) Development Agreement on behalf of City, generating \$6.5M in monetary contributions and in-kind services by Developer.

***Neighborhood Stabilization Program (NSP), City of Miami Gardens***

Established by Congress, the objective of the NSP was to stabilize communities impacted by foreclosures through the purchase and redevelopment of these residential properties.

**Cost:** \$6.8M

# COREY W. O'GORMAN, AICP

700 US-1, Ste C, North Palm Beach, FL 33408  
(561) 863-2722 □ corey@placepnd.com

---

## **Education**

### **Rollins College**

*Bachelor of Arts, Environmental Studies 1983*

### **American Institute of Certified Planners (AICP)**

*Certification - 1991*

## **Affiliations**

*Palm Beach County Commission on Affordable Housing, July 2018 to present*

*Planning Commission, Village of North Palm Beach, 2012 to 2016*

*Florida Planning Association member, current*

*Florida Housing Coalition member, current*

*Florida Redevelopment Association member, current*

*Florida Trust for Historic Preservation member, current*

*PB County League of Cities associate member, current*

*North Palm Beach County Chamber of Commerce member, current*

## **WORK EXPERIENCE & QUALIFICATIONS**

### **PLACE Planning & Design, Inc.**

*President*

**North Palm Beach, Florida**

**2006-present**

Responsible for all aspects of company activities including client relations, business development, contracting and invoicing, and completing all company projects which include:

- Due diligence feasibility studies to evaluate development potential, how to proceed with the development process, and/or for possible investment.
- Applications for various governmental approvals for site plan, zoning, permitting, etc., on a wide range of projects including residential, commercial, industrial and institutional.
- Direct and oversee the design, permitting and construction for various projects as the Owners' Representative Project Management, serve as owners point of contact.
- Provide zoning consulting services and code amendment services to public and private agencies and companies.
- Community Redevelopment Agency (CRA) consulting including preparation of findings of necessity, redevelopment planning and project implementation.

### **Toll Brothers, Inc.**

*Project Manager*

**Jupiter, Florida**

**2005-2006**

Responsible for the management and coordination of various design and regulatory activities related to the development of a large residential community in Jupiter, Florida, including all necessary on-site and off-site infrastructure and lots for construction of homes. Project included single-family homes townhomes, golf course and clubhouse.

## Representative Projects



**Hallandale Beach CRA (2013-2014, Completed)**

In-Fill Housing Project, Phase 1. General Contractor for the construction 8 new single-family homes. Project cost \$1,500,000. Commenced Phase 2, 2015.

## REPRESENTATIVE PROJECTS (CONT.)



### **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 +/-

## REPRESENTATIVE PROJECTS (CONT.)



**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 +/-)

## REPRESENTATIVE PROJECTS (CONT.)



### **Community Land Trust of PB County (2016-2020) – Kirk Road Homes**

General Contractor on the 8 affordable homes. Site development and full construction. Project cost (\$2,100,000 +/-)

## REPRESENTATIVE PROJECTS (CONT.)



### **Delray Beach Community Land Trust (2009-2020)**

General Contractor for the construction 35+ new single-family homes. Project cost \$6,000,000+/-

## REPRESENTATIVE PROJECTS (CONT.)



**Adopt A Family of the Palm Beaches (2019-2020 completed)**

General Contractor on the 14-unit affordable housing project with community center. Site development and full construction. Project cost (\$3,500,000 +/-)

## REPRESENTATIVE PROJECTS (CONT.)



### **Neighborhood Renaissance (2017-2019 completed)**

General Contractor on the 8-unit affordable housing project with 2,000 SF commercial building. Site development and full construction. Project cost (\$3,500,000 +/-)

## REPRESENTATIVE PROJECTS (CONT.)



### **Delray Beach Community Land Trust (Proposed)**

General Contractor for the construction of 10 new single-family homes including lot development. Project cost (\$2,400,000 +/-)

## REPRESENTATIVE PROJECTS (CONT.)



### **Community Land Trust of PB County (2015 -2018)**

General Contractor on the 16 affordable SF homes, and 8  
Townhouse units. Site development and full construction.  
Project cost (\$4,800,000 +/-)

## Ability to Secure Funding

Project financing will be needed for the design, permitting, and construction of infrastructure and that of individual homes, and permanent mortgages (and subsidies) will be needed for the purchase of the homes by income-qualified buyers. 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 East to West Development Corporation. 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/CRA, and the City’s Grant Administration Manager to formulate a strategy for funding the cost to design, permit and construct the required infrastructure.

## **Homebuilding**

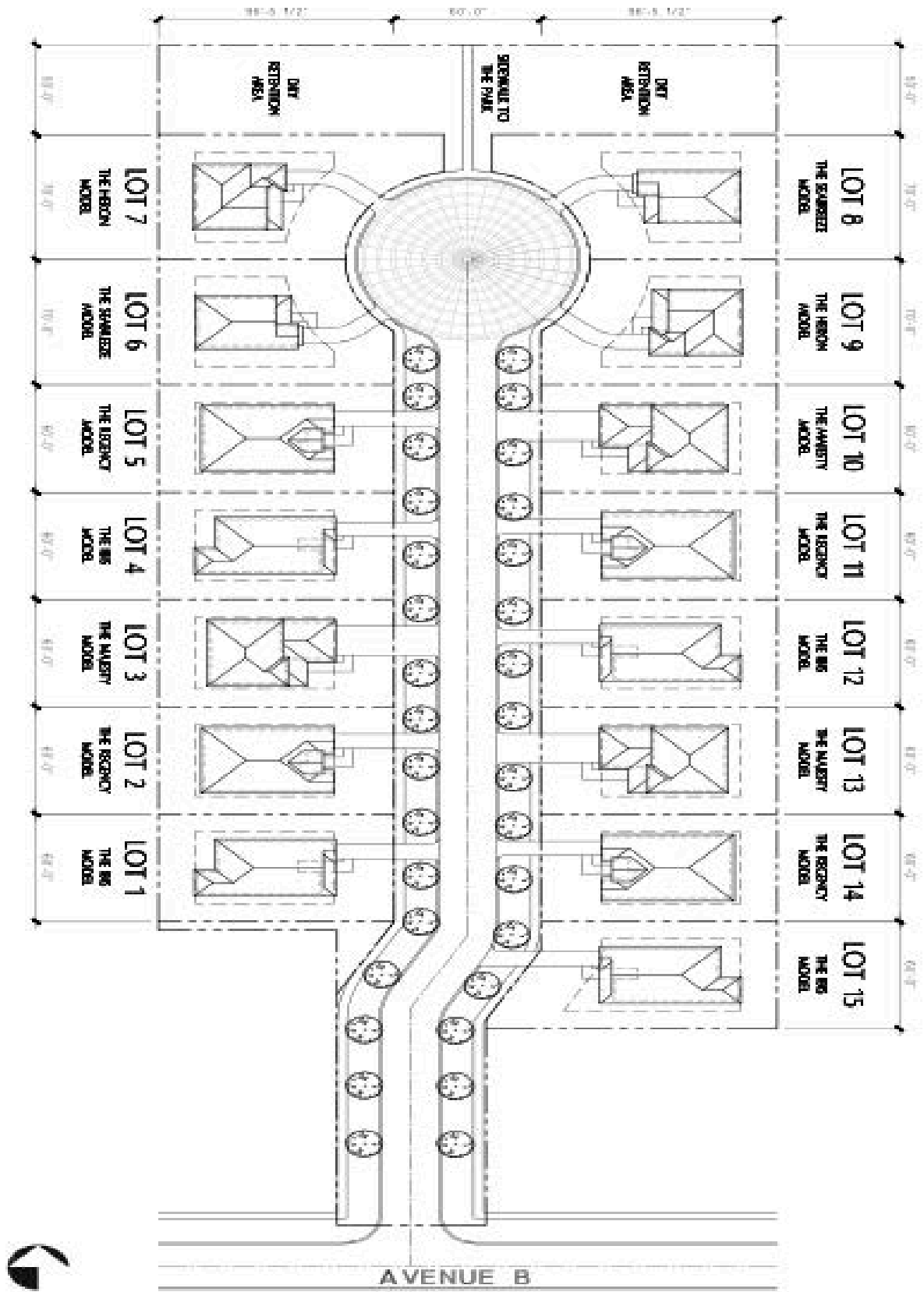
Stuart & Shelby Development will work with the City and CRA to formulate the right strategy for funding construction of the homes. This could include short-term construction financing obtained by either the City or Stuart & Shelby, although the interest would add cost to the project. If funds are available 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**

ETWDC will also take the lead in identifying a pool lending partners that can provide first mortgages to the buyers of the housing units being built in phase II. Daniel Rosemond is well versed in this task as a former CRA Director and will collaborate with FPRA staff to begin this process early on. Unlike traditional residential home buying, affordable housing requires several steps and often includes homebuyer counseling and credit repair.

The actual sale price of the homes will depend on the appraised value and lender underwriting criteria. 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 total development cost of the unit is \$250,000, there is a gap of \$130,000 that will need to be subsidized. Additionally, the buyers may need down payment assistance even if qualifying for a first mortgage. Strategy 3 of the City’s SHIP LHAP allows up to \$50,000 award subject to an affordability restriction, and thus this could be a source of funding to assist with the sale of homes to income-qualified buyers.

Preliminary Development Plan



# The Ibis

Three Bedrooms, Two Baths, One Car Garage

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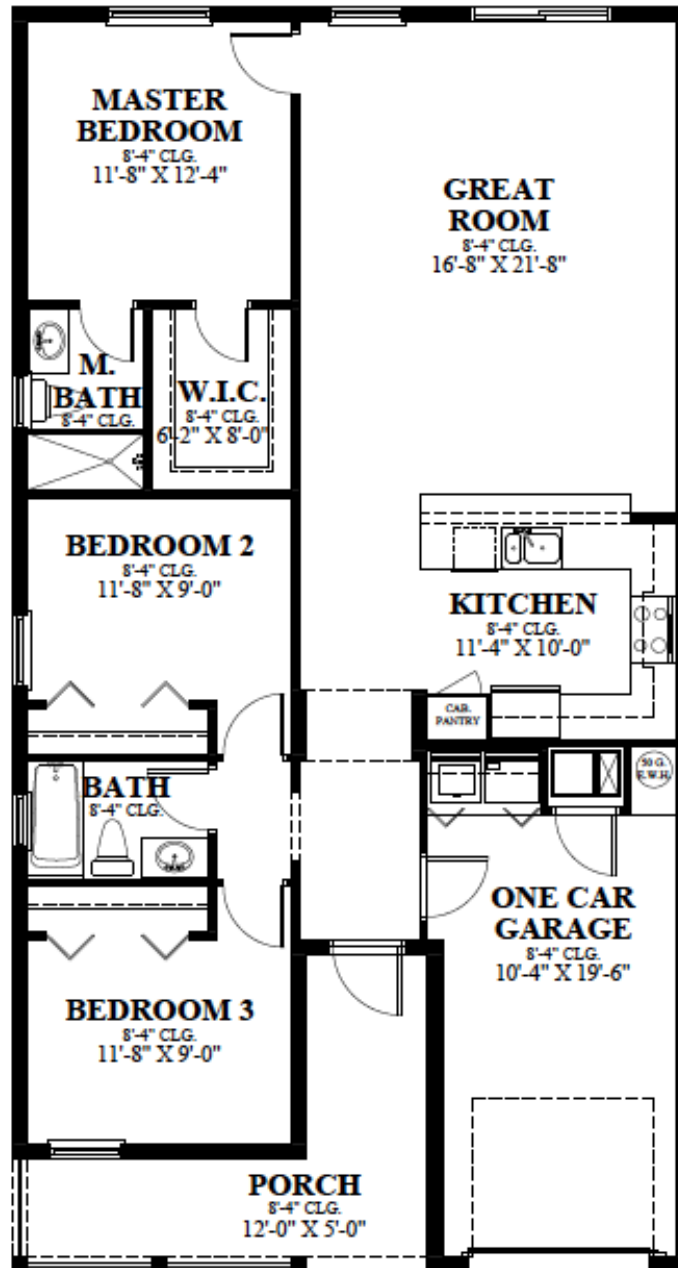
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# The Ibis

Three Bedrooms, Two Baths, One Car Garage

## AREA CALCULATIONS:

A/C LIVING AREA:	1,269 SQ. FT.
GARAGE:	267 SQ. FT.
PORCH:	140 SQ. FT.
<b>TOTAL:</b>	<b>1,676 SQ. FT.</b>



THIS MODEL FITS ON LOTS 1-5 & 10-15.

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# The Regency

Three Bedrooms, Two Baths, One Car Garage

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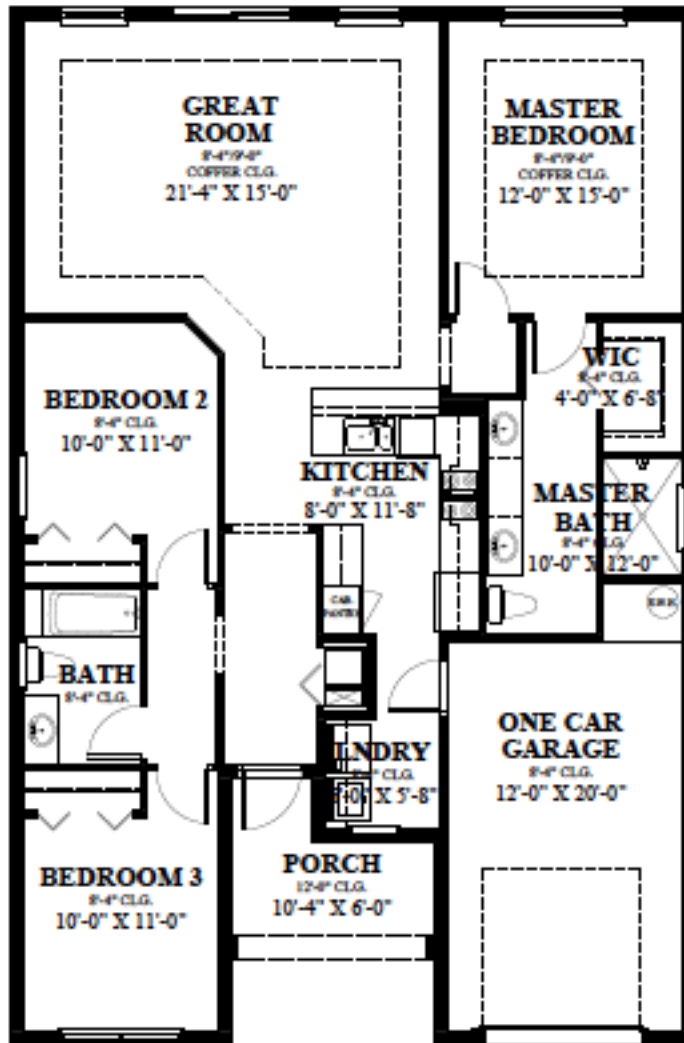
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# The Regency

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>



THIS MODEL FITS ON LOTS 1-5 & 10-15.

ALL DIMENSIONS ARE APPROXIMATE AND SHALL BE USED AS A GUIDE ONLY. THE EXACT DIMENSIONS OF THIS PROPERTY, OF THIS OFFICE AND WHEN CREATED, APPLIED AND DEVELOPED FOR THE USE, AND IN CONNECTION WITH, THE PRESENT PROJECT, SHALL BE DETERMINED BY THE SURVEYOR'S RECORDS AND SHALL BE SHOWN ON THE PLANS. THE EXACT DIMENSIONS OF THIS MODEL, LAYOUT, ARRANGEMENTS OR PLANS SHALL BE DETERMINED BY THE ARCHITECT'S DRAWINGS AND SHALL BE SHOWN ON THE PLANS. THE EXACT DIMENSIONS OF THIS MODEL, LAYOUT, ARRANGEMENTS OR PLANS SHALL BE DETERMINED BY THE ARCHITECT'S DRAWINGS AND SHALL BE SHOWN ON THE PLANS.

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# The Seabreeze

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

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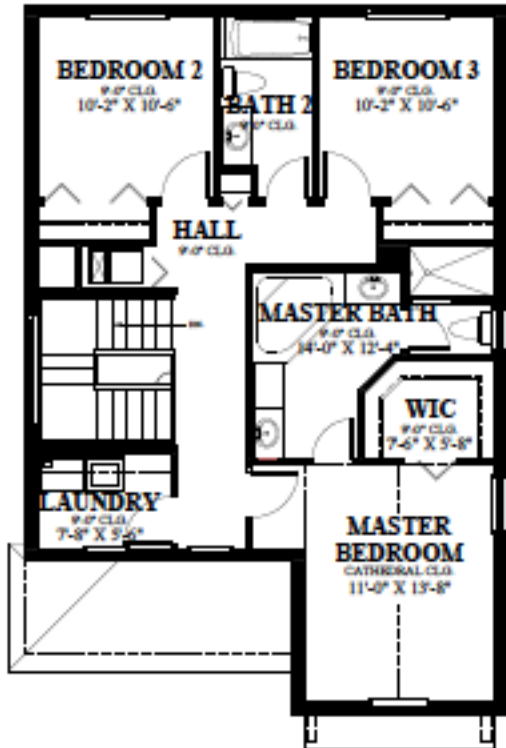
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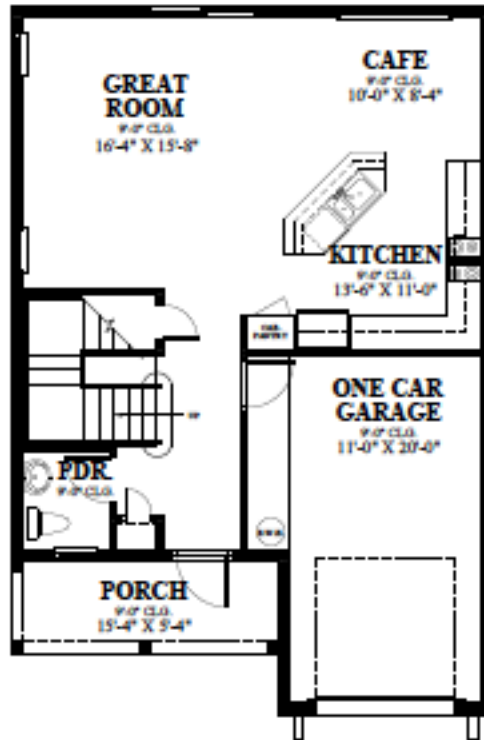
# The Seabreeze

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

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.



SECOND FLOOR PLAN



FIRST FLOOR PLAN

THIS MODEL FITS ON LOTS 6-9.

ALL ROOM DIMENSIONS, ASSIGNMENTS AND PLANS INDICATED OR REPRESENTED BY THIS DRAWING ARE PROVIDED BY AND THE PROPERTY OF THE OFFICE AND SHALL BE USED AS A GUIDE ONLY. ALL DIMENSIONS SHALL BE TAKEN TO THE CENTERLINE UNLESS OTHERWISE NOTED. ALL DIMENSIONS SHALL BE TAKEN TO THE CENTERLINE UNLESS OTHERWISE NOTED. ALL DIMENSIONS SHALL BE TAKEN TO THE CENTERLINE UNLESS OTHERWISE NOTED. ALL DIMENSIONS SHALL BE TAKEN TO THE CENTERLINE UNLESS OTHERWISE NOTED.

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# The Heron

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

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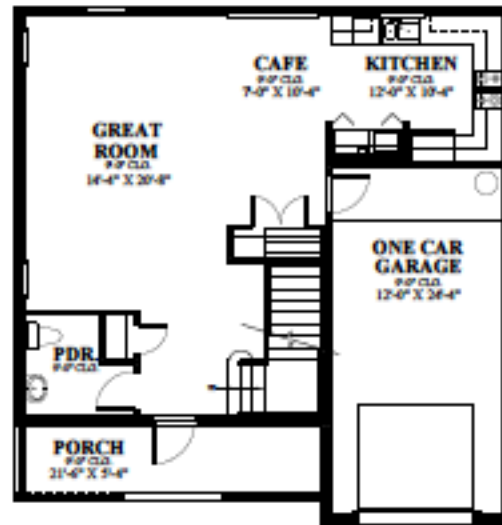
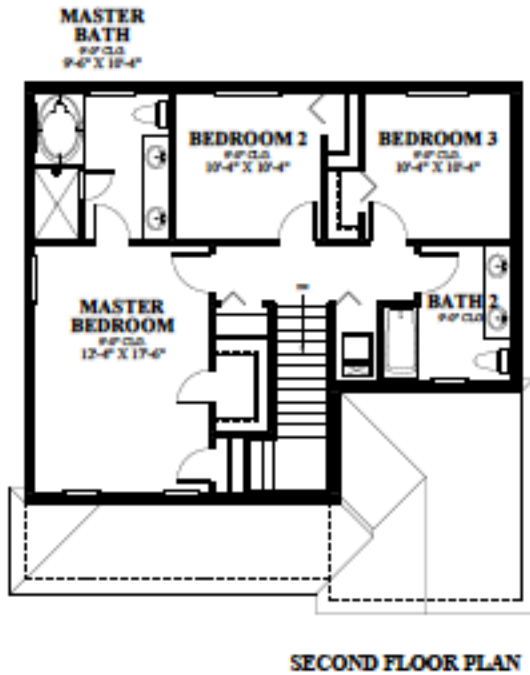
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# The Heron

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

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



THIS MODEL FITS ON LOTS 6-9.

ALL DIMENSIONS, APPOINTMENTS AND PLANS INDICATED OR REFERENCED BY THIS DRAWING ARE CHECKED BY AND THE PROPERTY OF THIS OFFICE AND WERE PREPARED, APPROVED AND DEVELOPED FOR THE USE, AND IN CONNECTION WITH, THE PROJECTED PROJECT. NONE OF SUCH DIMENSIONS, APPOINTMENTS OR PLANS SHALL BE USED BY OR INCORPORATED IN ANY PROJECT, HOME OR CONSTRUCTION FOR THE SAID PROJECT WITHOUT THE WRITTEN PERMISSION OF STUART & SHELBY, ARCHITECTS.

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# The Majesty

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

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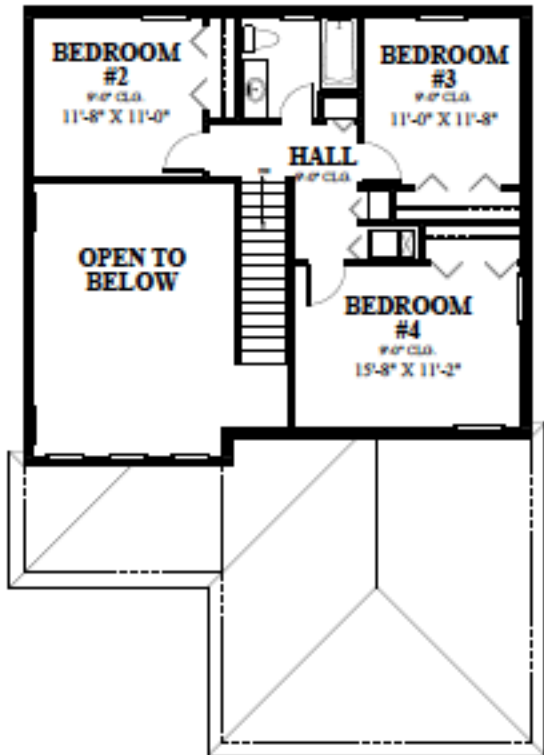
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# The Majesty

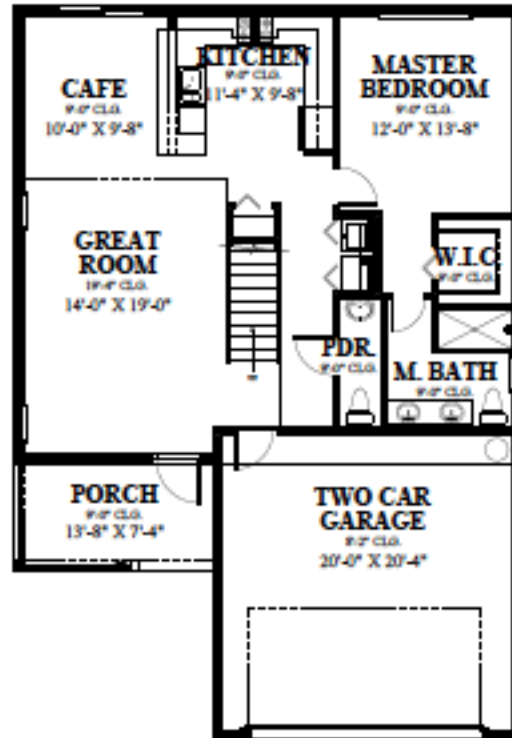
Four Bedrooms, 2 1/2 Baths, Two Car Garage

## AREA CALCULATIONS:

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



SECOND FLOOR PLAN



FIRST FLOOR PLAN

THIS MODEL FITS ON LOTS 1-5 & 10-15.

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# Housing Specifications for Oaks at Moore's Creek

## Inspiring Architecture and Design Features

- Monolithic Slab and CBS exterior walls with bond beams (rake beams where needed)
- Prefabricated engineered wood truss system for roof and floors if two story home with  $\frac{3}{4}$ " T&G plywood sheathing
- Dimensional shingle roofs in standard colors (GAF or equal)
- 6" seamless gutters and downspouts on hip elevations
- Stucco light texture finish on exterior walls and overhangs with smooth finish on any horizontal or vertical stucco siding look
- Decorative stucco bands per plan
- Designer exterior paint schemes- 3 colors on house- body, fascia/ trim, doors
- Broom swept concrete driveway & city walk along street front
- Hurricane impact rated single hung windows and doors (insulated impact may be used to meet code)
- Hurricane impact rated metal embossed garage door with opener
- Hurricane impact rated fiberglass two panel entry door
- Exterior hose connection (minimum two per home)
- Exterior GFI receptacle (minimum two per home )
- Coach light on one side of garage door
- Minimum 16 SEER air conditioning system with digital thermostat (Carrier or equal)
- Fully irrigated (off city water) and landscaped site to code

## Custom Interior

- 5/8" drywall on ceilings, 1/2" drywall on walls, dense shield in bathroom wet areas around tub and/or shower. Knockdown drywall finish on ceilings and knockdown or orange peels finish on walls (except bathroom ceilings and walls are always 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
  - R20 foam insulation to underside of roof deck, R4.1 foil on exterior masonry walls which have 1x2 fir strips
  - Hollow core 2 panel interior doors
  - Decorative 2-1/4" casing on all swing doors and 5-1/4" baseboards in all rooms except bath rooms.
  - Lever door hardware on all interior doors (brushed chrome finish)
  - Wood look 6 x 36 tile (or similar) on all main floors including bedrooms on one story homes (does not include stairs or any flooring upstairs)- 4 color options
  - FHA carpet on stairs, hallway and bedrooms of two story units (gypcrete and tile option can be priced on request)
  - Carrera white/ gray marble window sills
  - Ventilated "free glide" vinyl coated metal closet shelving
  - Minimum 50 gallon electric water heater
  - Minimum 150 amp electric service
  - "Decora" rocker light switches through out home with standard receptacle in white
  - Smoke/ carbon detectors per code
-

- RG6 & Cat 6 data/ cable in all bedrooms and family room or living room
- 1 phone CAT 6 at kitchen or master bedroom
- Structure wiring to On-Q panel for TV, Telephone and alarm.
- Wired alarm with contact only on entry door, any sliders or exterior doors and house to garage door. One keypad at entry door and wiring only for keypad at master bedroom. No contacts on impact windows. 2 Motion detectors in house in view of front and rear door
- Deluxe energy rated lighting fixture package for bathrooms, foyer, dining room, hallway and walk in closets, 52" white ceiling fans with light kit in all bedrooms, (allowance \$900 includes fans)

### Gourmet Kitchen

- Aristokraft Brellin shaker style cabinets with soft close doors and drawers- 3 color options- white, light gray and dark gray
- 3 CM level A granite with eased edge and 4" backsplash- 4 color options
- Single bowl stainless steel under-mount sink
- Moen single lever faucet with pull out spray
- Appliances in stainless steel
- Energy Star Refrigerator 25 cf side x side with ice and water in door
- Energy Star Dishwasher
- Electric 30" range self-clean Ceran top
- Over the range non-vented microwave
- 1/2HP garbage disposal
- Full size Energy Star Washer and Full-size Dryer- white

### Luxurious Baths

- Aristokraft Brellin shaker style cabinets with soft close doors and drawers- 3 color options- white, light gray and dark gray
- 3 CM level A granite with eased edge and 4" backsplash- 4 color options
- Cannes equal bath tile- 12 x 12 on floor and walls but shower floor has 2 x 2- 3 color options
- Proflo or equal steel or vikryl bathtub in bath(s) per plan- white
- 1/4" polished edge mirror over vanity - 48" high x width of vanity
- Chrome bath accessories include towel bar and paper holder in each bath
- Recessed medicine cabinet in all baths
- Moen 2 handle 8" center chrome faucet in all baths
- Proflo or equal under mount rectangle vanity sinks in white
- Proflo or equal elongated comfort height commodes in white
- 3/8" frameless shower door at showers only (no tubs)

No window treatments or furnishings are included.

**Homes will achieve a minimum NGBS Bronze green certification**

## How Stuart & Shelby's Plan for Phase II at the Oaks at Moore's Creek achieves the goals established in the FPRA Plan

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

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.

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

## Traffic Impacts (Preliminary)

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 generation rates, 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 an 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

## 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 \$39,667 per lot and a total of \$595,000. 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 \$125 per gross square foot. This estimate includes all hard and soft costs but does not include permit fees, impact fees and utility connection fees.

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 comparable 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 down payment assistance so that they are affordable to low- and moderate-income buyers. Consequently, the sales prices can only be estimated at this time.

Below is a simple breakdown of the total development costs, projected revenue, and subsidy (gap) needed to complete this project:

### Costs

Average Construction Cost:	\$3,862,500*
Soft Costs (5%):	\$193,125
Infrastructure Connection:	\$595,000
Gov. Fees/Impact Fees:	not included
Developer Fees (10%):	\$386,250

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Total Development Cost: \$5,036,875

### Revenue

Projected revenue from sales: \$2,250,000 (based on \$150,000 per unit)

Subsidy needed for gap: (\$2,278,875)

\*Amount subject to variation based on models selected for development

## Proposed Financing Plan

Stuart & Shelby Development Team 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:

- *Land Acquisition Costs*
  - This proposal is for the Redevelopment Agency to retain ownership of the land until the point of sale, thus reducing the project cost. However, the FPRA has not indicated if they would like to sell, convey, or retain ownership of the land.
- *Infrastructure Costs*
  - to construct the infrastructure and develop the subdivision in preparation for home building and is estimated at approximately \$595,000. 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.
- *Construction Costs*
  - The total hard and soft costs is estimated at \$4,055,625. This estimate does not include Davis-Bacon wage rates, which would increase cost by approximately 7-8% if required.
- *Closing Costs*
  - Given recent home sales in the area, a gap between total development costs and appraised value is anticipated. This gap is estimated at \$2.28M

This project 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 down payment 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 required infrastructure and homebuilding. 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.

## Proposed Acquisition Terms

Stuart & Shelby Development Team proposes that the FPRA retain ownership of the land and enter into a public private partnership for its development. Should this structure not be feasible, the alternative proposed acquisition term would be a conveyance of the land with applicable deed restrictions (designating its use for affordable housing and with a reverter clause if any violations in the Development Agreement are violated).

A straight-line purchase of the land by the Stuart & Shelby Team is not desirable. This would add considerable development cost and does not accelerate the FPRA's objective for Phase II.

## Project Implementation Schedule

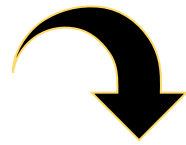
- Months 1-6
  - Negotiate and execute Development Agreement
  - Finalize project financing strategy, and seek other sources of funds for infrastructure construction
  - Homebuyer outreach
  - Design and permitting of infrastructure
  - Subdivision platting/re-platting

At completion of infrastructure permitting, and once a pool of potential homebuyers are 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

**STUART & SHELBY DEVELOPMENT  
&  
EAST TO WEST DEVELOPMENT**



**END  
OF  
PROPOSAL**