



Facilities Management Division  
Real Property Management

3335 Tamiami Trail E, Suite 101, Naples, Florida 34112  
Fax: 239-252-8876 • Email: RPM@CollierCountyFL.gov

**WORKFORCE HOUSING LAND ACQUISITION POLICY SURTAX FUNDING EVALUATION CRITERIA**  
Approved by Board of County Commissioners 3/28/2023, Item 11

**SURTAX FUNDING REVIEW AND APPROVAL PROCESS**

Applicants may complete steps A and B simultaneously.

**A. Complete and Submit Workforce Housing Land Acquisition Surtax Funding Application**

- Review will include:
  - Business Plan
  - Project Financing & Value to County
  - Experience and Capacity of Firm

**B. Apply for a Conceptual Site Plan (CSP)**

- After payment of the \$500 CSP Pre-Application meeting fee, review will include:
  - Permitted density and the number of units provided
  - Required and provided setbacks and separation of structures
  - Compliance with site geometry, parking, setbacks, landscape buffers, open space, environmental, stormwater, utilities, transportation, zoning, and the comprehensive plan

After review of Surtax Funding Application and CSP:

**Track 1-** If review is satisfactory, the applicant will be scheduled to make a presentation of their plan and request directly to the County Manager followed by the Board of County Commissioners.

**Track 2-** If review requires additional information or changes, the applicant will be directed to refine the project and make presentations to seek recommendations from the Affordable Housing Advisory Committee and the Citizens Surtax Review Committee, prior to meetings with the County Manger and Board of County Commissioners.

**APPLICANT CONTACT INFORMATION**

Name of Property Owner(s): \_\_\_\_\_

Name of Applicant (if different than owner): \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_ Cell: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Name of Agent: \_\_\_\_\_ Firm: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_ Cell: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

**PROPERTY INFORMATION**

Address of Subject Property: \_\_\_\_\_

Section/Township/Range: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ Property I.D. #: \_\_\_\_\_

Subdivision: \_\_\_\_\_ Unit(s): \_\_\_\_\_ Lot(s): \_\_\_\_\_ Block(s): \_\_\_\_\_

Current Zoning and Land use of Subject Property: \_\_\_\_\_

On November 6, 2018, the voters of Collier County approved a one percent (1%) local government infrastructure surtax upon all taxable transactions occurring within the County. Twenty million dollars (\$20,000,000) of this surtax is earmarked to be used for land acquisition in accordance with Section 212.055(2), Florida Statutes.

On March 28, 2023, the Collier County Board of County Commissioners approved the below to guide future land acquisitions using these funds for the development of future workforce housing projects.

**SURTAX FUNDING EVALUATION CRITERIA**

For the development of a shortlist, this evaluation criterion will be utilized by a COUNTY Selection Committee to score each proposal. Proposers are encouraged to keep their submittals concise and to include a minimum of marketing materials. Proposals must address the following criteria:

| <b>Evaluation Criteria</b>                    | <b>Maximum Points</b> | <b>(point allocations subject to change)</b> |
|---|-----------------------|--|
| 1. Cover Letter / Management Summary          | 0                     | Points                                       |
| 2. Property and Business Plan                 | 45                    | Points                                       |
| 3. Financing & Cost of Services to the County | 20                    | Points                                       |
| 4. Experience and Capacity of the Firm        | 15                    | Points                                       |
| 5. Specialized Expertise of Team Members      | 10                    | Points                                       |
| 6. Certified Minority Business Enterprise     | 5                     | Points                                       |
| 7. Local Vendor Preference                    | 5                     | Points                                       |
| <b>TOTAL POSSIBLE POINTS</b>                  | <b>100</b>            | <b>Points</b>                                |

**Each criterion and methodology for scoring is further described below:**



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**EVALUATION CRITERIA NO. 1: COVER LETTER/MANAGEMENT SUMMARY (0 Total Points)**

- Provide a cover letter, signed by an authorized officer of the firm, indicating the underlying philosophy of the firm in providing the services stated herein. Include the name(s), telephone number(s), and email(s) of the authorized contact person(s) concerning the proposal.

**EVALUATION CRITERIA NO. 2: PROPERTY AND BUSINESS PLAN (45 Total Points)**

In this tab, including but not limited to:

1. Project Scope  
The proposal should provide a written description of the project, accompanied by a conceptual site plan showing proposed building(s), parking areas, and how the development will interface with the surrounding areas. In addition, the proposed unit type (single family, multi-family, rental, or for purchase) and dwelling size (1, 2, 3, or more bedrooms) should be provided along with any planned amenities.
2. Community Impact  
The proposal must describe how the proposed project fits with the adjacent parcels, meets the intent of the Board of County Commissioners expectations, as detailed in this ITN, and would generally benefit the community, surrounding areas, and the County as a whole. Include as many conceptual visuals as possible such as site plans, renderings, and elevations, as applicable. In addition, please provide a description of how the proposed project meets the housing affordability needs per the Collier County Community Housing Plan.
3. Zoning  
The proposal must identify if the property's zoning or a specific rezoning will be required to assist in the development of the proposal. If applicable, identify if the rezoning will require a comprehensive plan amendment or other special zoning relief. Be as specific as possible and provide documentation as needed to substantiate the request. Identify the timing of zoning and if the property should be zoned prior to the project.
4. Timeline  
The proposal must clearly identify approximate milestones that will be included in the land acquisition and development agreement such as the due diligence period, zoning process, if required, site development, building permits, construction, and through to the Certificate of Occupancy.
5. Site-Specific Criteria  
Upon approval of moving forward with this ITN the Board of County Commissioners agreed the following criteria should be mandated in the development of the property. In preparation of this proposal, it is important the following criteria are included for consideration:
- Quantify desired density. The BCC is seeking proposals that will provide a moderate to high density of units.
  - Identify all dwelling types and if more than one type is proposed provide unit type ratios.
  - Define project set-asides of more than 10% for seniors, veterans, and/or special needs populations.
  - Define the targeted income mix proposed and how it correlates with the Community Housing Plan.
  - A preference that 100% of the units built be affordable and not at market rate (subject to change based on Board approval).



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- Target greatest units and income needs (currently rental housing at the lower income levels).
- Cost of Property: Must not exceed the appraised value.
- Disaster Evacuation Zone: Greater Consideration if NOT in Zone A, lesser consideration if in Zone A.
- Utilities: Greater Consideration if utilities are available, lesser consideration if not available.
- Wetlands: Must be less than 20% wetlands, with greater consideration for lower percentages.
- Environmental: Must pass Phase I Standards, with greater consideration if passes Phase II standards as well.
- Transportation: Greater Consideration if on an Arterial Road, lesser consideration on a Collector Road.
- Shovel Ready: Greater consideration for fully zoned properties.
- Density: Greater consideration for higher densities, lesser consideration for lower densities.
- Proximity/Locational: Greater consideration closer to schools, Transit Stops, and Activity Centers.
- Topography: Greater consideration for flood zones (AH and X). Lower consideration will be given to AE Zone properties (an area inundated by 1% annual chance flooding with velocity hazard (wave action) for which the Base Flood Elevation (BFE) has been determined) and properties in a VE Zone (where wave heights are expected to be 3 feet or more for which the BFE has been determined) will be eliminated from any consideration.

6. Any Additional Information

Include other relevant information about the project that has not been addressed in the previous questions that the proposer would like to present to the Board in support of the proposal. The intent of this phase of the screening process is to identify a project that a majority of the Board can support moving forward to a detailed purchase and development agreement. Should your proposal be selected, the purchase and development agreement will incorporate specific milestones in the development process. The Board's acceptance of a proposal shall not constitute approval of future zoning if needed for the project to be developed.

**EVALUATION CRITERIA NO. 3: FINANCING & COST OF SERVICES TO THE COUNTY (20 Total Points)**

In this tab, including but not limited to:

1. Financing

The proposal must provide a general financing plan. The proposal must identify if the project will be a straight purchase (if so, what is the purchase price?), partial purchase, require financing (if so, is the expectation that the County defer the purchase price until the completion of construction and/or contribute to the financing package?), or any other potential financing configuration needed for the project. In addition, the Financing information provided should include at the minimum the following:

- Per unit construction costs
- Proformas for rental and proposed rates (if applicable)
- Per unit market costs and sales price (if applicable)
- Detailed soft funding incentives required from the County
- Proposed funding sources with contingencies
- Address any potential Land Trust contribution (if applicable)
- Detailed affordability restrictions

The proposer should submit a financing plan that demonstrates the proposer's financial ability to successfully purchase and complete the development of the parcel. Limited pro-forma would be acceptable based on the conceptual plan submitted for review.



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**2. Total Project Value**

Include an approximate construction value and ending taxable value. Please state if your entity holds tax-exempt status or if the project is eligible for tax exemption. Also, include a detailed description of how the project is committed long-term to address housing affordability in Collier County.

**EVALUATION CRITERIA NO. 4: EXPERIENCE AND CAPACITY OF THE TEAM (15 Total Points)**

In this tab, including but not limited to:

- Provide information that documents your firm's qualifications to produce the required deliverables, including abilities, capacity, skill, financial strength, and the number of years of experience in providing the required services.
- Describe the various team members' successful experience in working with one another on previous projects.
- Teams including a not-for-profit partner will be given greater consideration.

**The County requires that the vendor submits no fewer than five (5) completed reference forms from clients from the past ten (10) years whose projects are of a similar nature to this solicitation as a part of their proposal.**

Provide information on the projects completed by the vendor that best represent projects of similar size, scope, and complexity of this project using the Reference Form provided. Vendors may include two (2) additional pages for each project to illustrate aspects of the completed project that provides the information to assess the experience of the Proposer on relevant project work.

**EVALUATION CRITERIA NO. 5: SPECIALIZED EXPERTISE OF TEAM MEMBERS (10 Total Points)**

The proposal must include a description of the firm/team, including locations of offices, the person responsible for contracting services, and the location of the contracting authority. Include a list of the qualified professional team members and qualifications of associates proposed to perform and/or assist with the work to oversee the project. Identify the names and provide resumes of proposed management members that will supervise the project, including an organizational flow chart, if available, showing the working relationship of the management structure. The proposal shall submit a portfolio of projects of similar size and scope completed and or managed by the firm or team.

**EVALUATION CRITERIA NO. 6: CERTIFIED MINORITY BUSINESS ENTERPRISE (5 Total Points)**

Submit certification with the Florida Department of Management Service, Office of Supplier Diversity as a Certified Minority Business Enterprise.

**EVALUATION CRITERIA NO. 7: LOCAL VENDOR PREFERENCE (5 Total Points)**

Local business is defined as the vendor having a current Business Tax Receipt issued by the Collier or Lee County Tax Collector prior to proposal submission to do business within Collier County, and that identifies the business with a permanent physical business address located within the limits of Collier or Lee County from which the vendor's staff operates and performs business in an area zoned for the conduct of such business.

The Board may waive, in whole or in part, any portion of this policy when reviewing a proposed acquisition of land for affordable housing.



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**The completed application, all required submittal materials, and questions shall be submitted to:**

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Signature of Applicant or Agent

\_\_\_\_\_  
Printed Name of Signing Party

\_\_\_\_\_  
Date