



**TO:** Honorable Mayor & Members of the  
Fort Lauderdale City Commission

**FROM:** Lee R. Feldman, ICMA-CM, City Manager

**DATE:** May 6, 2014

**TITLE:** Motion to award a one year contract for Historic Tax Credit Consultant  
Services – Request for Qualifications (RFQ) 945-11372

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**Recommendation**

It is recommended that the City Commission award a one-year contract for Historic Tax Credit Consultant Services to the single, responsive and responsible proposer, Brian Wishneff & Associates. There will be no fiscal impact to the City of Fort Lauderdale. The Commission is requested to authorize the City Manager to approve three, one-year renewal option, contingent upon the needs of the City.

**Background**

The City of Fort Lauderdale desires to utilize federal historic tax credits to assist in funding a portion of the renovation costs for City property. The City solicited Statements of Qualifications from consulting firms to assist with evaluating the potential to use Historic Tax Credit programs in its current and future developments. The consultant will be responsible for assisting the City with the following:

1. Task Applicable for Each Tax Credit Program:
  - Evaluate and determine the optimum structure for implementing the tax credit programs
  - Credit tax credit-related entities and agreements
  - Prepare information packages for potential credit investors
  - Investor recruitment & evaluation
  - Incorporate existing project work and expenses
  - Coordinate with project accountants
  - Manage and coordinate the closing of tax credit program transactions on behalf of the City of Fort Lauderdale

## 2. Historic Tax Credit:

- Review of the Architect's work to increase qualified rehabilitation expenses (QRE)
- Review of General Contractor's work to increase QRE
- Evaluate hard and soft costs for QRE
- Create and collect information need by the investor for closing
- Work with selected accounting firm to complete the cost certification
- Serve as primary contact with the accounting firm hired by the City of Fort Lauderdale to perform a cost-certification-audit (Audit) at the end of construction

On January 31, 2014 the Procurement Services Division released a RFQ in BidSync and received a single response. The evaluation committee determined that Brian Wishneff & Associates is the lowest cost, responsive and responsible proposer for this project.

The evaluation committee included Emilie Smith, Budget Manager, Linda Logan-Short, Deputy Director Finance, and Jenni Morejon, Deputy Director Sustainable Development.

### **Resource Impact**

There is no fiscal impact to the City. When a project is identified, the Consultant will use state and/or federal tax credit programs. The Consultant fees are paid from tax credit programs rather than the City of Fort Lauderdale. Actual work is subject to appropriation of revenue and expenses.

### **Strategic Connections:**

This item is a *Press Play Fort Lauderdale Strategic Plan 2018* initiative, included within the Internal Support Cylinder of Excellence, specifically advancing:

- Goal 12: Be a leading government organization, managing resources wisely and sustainably.
- Objective 1: Ensure sound fiscal management.

This item also furthers the *Fast Forward Fort Lauderdale 2035 Vision Plan: We are Community.*

### **Attachments**

Exhibit 1 – Brian Wishneff & Associates proposal

Exhibit 2 - Agreement

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