



## **REQUEST FOR INFORMATION (RFI) - 163-06252025TB Nonprofit Housing Project Manager**

Thank you for your interest in Charlotte-Mecklenburg Schools. Please review the following instructions prior to submitting your information.

- This RFI ***does not*** obligate CMS to any purchase or to any action as a result of the information received.
- Vendors are cautioned that this is a request for information, not a request to contract, and Charlotte- Mecklenburg Schools reserves the unqualified right to reject any and all offers when such rejection is deemed to be in the best interest of Charlotte-Mecklenburg Schools.
- In submitting a response, the Offeror agrees not to use the results there from as part of any news release or commercial advertising.
- During the evaluation period—from the date of submissions are opened through the date the vendors are chosen—each Vendor submitting (including its representatives, sub-contractors and/or suppliers) is prohibited from having any communications with any person inside or outside of Charlotte-Mecklenburg Schools regarding this solicitation.

Each vendor must answer all questions and provide all requested information, where applicable. If the answer to any questions is “none” or if the question is not applicable, please state in writing. Any response failing to do so may be deemed to be nonresponsive with respect to this qualification at the sole discretion of CMS.

All qualified submittals will be evaluated. Vendors SHALL not be considered who are not approved or authorized by The State of North Carolina to do business with The State of North Carolina. Charlotte-Mecklenburg Schools reserves the right to waive any minor informality or technicality in submissions received

### **A. INTRODUCTION**

Charlotte-Mecklenburg Schools (CMS) is seeking information from potential nonprofit vendors that can serve as an end-to-end project manager for CMS’s Educator Community and follow-on projects. CMS is searching for a nonprofit entity with experience working with municipalities and/or public entities in developing residential sites and whose proposed project would meet the goals of CMS’s housing strategy, At Home in CMS, and have a positive impact on the neighboring community. Respondents are encouraged to seek and present creative legal and financial options that would benefit CMS, the respondent, and the future tenants of the development.

### **B. BACKGROUND**

In 2024, CMS launched its At Home in CMS strategy as a part of CMS’s total rewards compensation campaign to provide educators with a comprehensive rewards package and to support our educators to live in the community where they work. With increasing costs of living and housing costs that outpace state raises for teachers, CMS is expanding the benefits we provide to staff - mainly by leveraging Charlotte-area partners - to help make housing more affordable and attainable to our educators. At Home in CMS is a multi-phase community effort, therefore, that offers rental opportunities, homeownership, and financial literacy to support educators in acquiring the homes that they desire and deserve. In so doing, CMS is increasing its ability to recruit and retain the strongest educators on behalf of our students.

To date, the rental opportunities CMS has provided are offered through partnership from rental companies. These partners offer CMS teachers and staff discounts and access to high-quality available inventory at their properties.

Looking ahead, CMS aims to engage a vendor to create brand new, state-of-the-art, purpose-built housing to rent to teachers. CMS's role will be limited to two contributions: (1) guided by state statute and Charlotte-Mecklenburg Board of Education (CMBE) policy, CMS will provide land to be developed; and (2) CMS will identify, contract with, and monitor a nonprofit organization that will project manage the development, construction, leasing, operations and maintenance, and renovation of the property. The Project will consist of aspects inherent in a below-market rate housing development, with the recognition of the project as specifically providing rental units below 100% Area Median Income for rental to CMS teachers.

The nonprofit will be responsible for ensuring that the site is appropriately zoned and that all studies, reports, permits, approvals, and written agreements are satisfactory to CMS, including, but not limited to, conditional use permits as may be required, site plan approvals, plat/parcel map approvals, boundary/lot line adjustments, demolition, building and use permits, architectural approvals, environmental reports and permits, traffic studies and so forth, as required by the appropriate public or governmental authorities, have been finally adopted and/or obtained to permit the commencement and completion of construction and the ongoing operation of the Project, all in accordance with applicable law and said government permits and approvals.

The nonprofit will finance the design and construction of the project and be responsible for the construction of housing units on the site under a long-term ground/building lease arrangement, with CMS as the ground/building lessor. The final form of the lease will be negotiated with CMS, with the below market rate housing units ready to be rented by the nonprofit to CMS's eligible educators, in turn-key condition, subject to any recorded conditions, covenants and restrictions, as may be agreed upon by CMS and the nonprofit prior to commencement of rentals to CMS educators, including but not limited to maximum lease terms. CMS reserves the right to set eligibility and priority requirements of CMS teacher and employee rentals. The site shall be used only for the permitted use, unless, in reaction to changing needs, economies, markets and other factors, changes and amendments are agreed to by the parties.

### **C. SCOPE OF WORK**

The general scope of the Respondent's responsibilities under the Agreement will be as follows:

- A. **Design:** Working with CMS, the Respondent will be responsible for the design of the entire Project with CMS's input and approval. The design will address unit size, design and materials used. The design must comply with all applicable codes and regulations.
- B. **Professional Services:** The Respondent will provide (or contract to provide) all professional services necessary to the Project, to be more fully defined in the Agreement. Although not required, consideration will be given to Respondents who maintain professional licenses in one or more of the disciplines of real estate, architecture, construction or finance (in particular municipal finance, or public-private finance).
- C. **Construction:** The Respondent will be solely responsible for completion of the on-site construction of the Project, and all required (if any) off-site construction. CMS will require Performance and Payment bonding from the Respondent's construction firm. Bonding requirements are attached hereto.
- D. **Finance:** The Respondent will be responsible for the complete financing of the project.
- E. **Operation:** The Respondent will be solely responsible for the operation of the Project, with a negotiated, contractual agreement of how the finished property will be managed.
- F. **Maintenance:** The Respondent will be solely responsible for the maintenance of the Project, and for completion of the below market rate housing units' interior and tenant improvements, to be specified with particularity in the Agreement.

- G. **Environmental Documentation:** The Respondent will be responsible for all aspects of the required Environmental Documentation to satisfy any federal requirements for the proposed Site. Copies of all Environmental Documentation received by the Respondent will be provided to CMS.
- H. **Appraisal:** The Respondent will be responsible for all aspects of any required Appraisal and any Appraisal Review process and receiving any required governmental concurrence for the Appraisal. Copies of all Appraisals and Appraisal Review Documentation received by the Respondent will be provided to CMS.
- I. **Communication:** The Respondent will provide CMS with monthly reports on the status of the project through the design and planning stages of the project and will provide weekly status reports upon the Notice to Proceed with Construction through the completion of the work identified on the punch list following substantial completion. The Respondent may be asked to provide in-person status reports to CMS staff and/or the School Board upon request.
- J. **Annual Report:** The Respondent will provide CMS with an annual report, due upon a mutually agreed date as specified in the final contract documents, detailing the status of the development. Such report shall address but not be limited to: occupancy and retention rates, rental rate of all units as compared to the typical rental development in Mecklenburg County, and overall fiscal solvency of the project.
- K. **Protection and Risk Mitigation:** The Respondent will provide a demonstrated plan of how CMS's interests in the Project and ownership of the Site, will be protected with maximum risk mitigation.

CMS reserves the right to alter this scope of the nonprofit's responsibilities together with the right to negotiate the final respondent project team members.

Currently, CMS has immediate plans for one educator community to create proof of concept. This will be located on approximately 7 acres at PID 09304251 located at 1100 Eastway Drive, Charlotte, NC 28205. CMS anticipates using this first educator community as a blueprint for several additional projects to bring the strategy to scale, and, as such, seeks a nonprofit that has the capacity to project manage not only the first community but also - if successful in the first case – take on the same role for additional communities in the future.

This project directly supports the CMBE's Guardrail 4 High Quality Teachers: While ensuring all schools have teachers equipped to deliver high-quality instruction, the Superintendent shall neither neglect targeted nor comprehensive strategies for teacher recruitment, retention, and engagement.

**OBJECTIVES OF THIS RFI**

**Objective 1: Responding entity demonstrates shared commitment to CMS's project goals.**

For each criteria, describe, to what extent, your curriculum meets/does not meet the criteria.

<b>Criteria 1:</b> Commitment to the Charlotte community. Include relevant local experience and/or relationships.	
<b>Justification/Comments with Examples (include Evaluation):</b>	<input type="checkbox"/> Meets <input type="checkbox"/> Does Not Meet
<b>Criteria 2:</b> Commitment to expanding Charlotte's affordable housing inventory	
<b>Justification/Comments with Examples (include Evaluation):</b>	<input type="checkbox"/> Meets <input type="checkbox"/> Does Not Meet

**Objective 2: Responding entity demonstrates relevant expertise.**

For each criteria, describe, to what extent, your curriculum meets/does not meet the criteria.

<b>Criteria 1: Relevant expertise in constructing and executing complex project financing</b>	
<b>Justification/Comments with Examples (include Evaluation):</b>	<input type="checkbox"/> Meets <input type="checkbox"/> Does Not Meet
<b>Criteria 2: Relevant real estate expertise, including but not limited to: development, construction, and operations</b>	
<b>Justification/Comments with Examples:</b>	<input type="checkbox"/> Meets <input type="checkbox"/> Does Not Meet
<b>Criteria 3: Designing and implementing successful public-private partnerships</b>	
<b>Justification/Comments with Examples:</b>	<input type="checkbox"/> Meets <input type="checkbox"/> Does Not Meet

**Objective 3: Creative and feasible plan for financial structure.**

For each criteria, describe, to what extent, your curriculum meets/does not meet the criteria.

<b>Criteria 1: CMS anticipates negotiating a long-term lease with the selected nonprofit entity. Thus far, the County and City have committed \$1M each in funding. The remainder of the project investment will need to be organized and secured by the selected nonprofit. Describe one or more models for structuring the project financing (debt and equity), including long-term plans for exiting all investors apart from CMS.</b>	
<b>Justification/Comments with Examples (include Evaluation):</b>	<input type="checkbox"/> Meets <input type="checkbox"/> Does Not Meet

**Objective 4: Capacity to achieve the project goals, on schedule and on budget.**

For each criteria, describe, to what extent, your curriculum meets/does not meet the criteria.

<b>Criteria 1: Describe the anticipated timeline and any phasing for: design, development, construction, design and construction finance and first leases.</b>	
<b>Justification/Comments with Examples (include Evaluation):</b>	<input type="checkbox"/> Meets <input type="checkbox"/> Does Not Meet
<b>Criteria 2: Examples of similarly completed complex projects, including original budget and final cost and original timeline and actual timeline</b>	
<b>Justification/Comments with Examples:</b>	<input type="checkbox"/> Meets <input type="checkbox"/> Does Not Meet

**VENDOR REQUIREMENTS**

The following requirements shall be provided by the vendor in an organized and easily identifiable manner that allows for quick reference. For each criterion, describe, to what extent, your organization can provide:

<p><b>Criteria 1: Vendor Profile</b> Potential vendor shall provide company profile information (company background, number of employees, type of company, financial information, capacity for handling services, location of company). Include any school districts or public entities with whom you have worked.</p>
<p><b>Comments with Examples:</b></p>
<p><b>Criteria 2: Vendor Experience</b> Potential vendor shall demonstrate experience with public sector clients with similar or greater size and complexity to the Charlotte Mecklenburg School district. Potential vendor shall provide information as to the qualifications and experience of all executive, managerial, legal, and professional personnel to be assigned to this project, including resumes citing experience with similar projects and the responsibilities to be assigned to each person.</p>
<p><b>Comments with Examples:</b></p>
<p><b>Criteria 3: Vendor Compliance with Applicable Statutes</b> Potential vendor shall include personnel or contract with subcontractors who hold relevant licenses. Potential vendor shall describe ability to comply with all applicable statutes.</p>
<p><b>Comments with Examples:</b></p>
<p><b>Criteria 4: Vendor Financial Viability</b> Potential vendor shall provide evidence of financial stability and capability to fund and/or guarantee all costs associated with the proposal.</p>
<p><b>Comments with Examples:</b></p>

**D. RFI Process**

Potential vendors are requested through this RFI to provide information regarding creating and managing an educator community as listed under the “Objectives of this RFI” section above. Certain vendors will be requested as a result of this RFI to engage in discussion and demonstration of their responses. These discussions will be scheduled during Summer 2025 prior to anticipated contracting and negotiated lease of CMS land in Summer 2025. **This RFI does not obligate CMS to any purchase or to any action as a result of the information received.**

**E. Proposed Schedule**

The table below shows the *intended* schedule for this RFI. CMS will make every effort to adhere to this schedule. This schedule is subject to change based on the preferences and needs of the Charlotte Mecklenburg Board of Education (CMBE).

Event	Responsibility	Date
Issue RFI	CMS	June 25
Submit Questions	Responder	June 30
Question Response	CMS	July 3
Submit Information	Responder	July 8

## F. Cost for Proposal Preparation

**THIS IS A REQUEST FOR INFORMATION ONLY.** This RFI is issued solely for information and planning purposes – it does not constitute a Request for Proposal (RFP) or a promise to issue a RFP in the future. **This request for information does not commit Charlotte Mecklenburg Board of Education (CMBE) to contract for any service whatsoever.** Invitees are advised that CMBOE will not pay for any information or administrative costs incurred in response to this RFI; all costs associated with responding to this RFI will be solely at the interested party's expense.

## G. Reference to Other Data

Only information received, in response to this RFI, will be evaluated; reference to information previously submitted shall not be evaluated.

## H. CMS Facts

Charlotte Mecklenburg Schools (CMS) is the nation's eighteenth largest school district in the nation and the second largest district in the state of North Carolina, with 118 elementary schools, 49 middle schools, 33 high schools. CMS offers an extensive range of magnet programs in 37 of these schools to nurture the talents of students who have interest and ability in specific areas. CMS serves over 140,000 students throughout the cities and towns of Mecklenburg County.

CMS is proud of its diverse mix of students who represent 187 different countries and various cultural and ethnic backgrounds. Of these 150,000+ students, 37% identify as African American, 27% identify as white, 25% identify as Hispanic, 7% identify as Asian. Of these students, 29% are identified as English Learners, 9% are identified as Students with Disabilities and 10% are identified as Academically Gifted.

## I. Proposal Questions

Upon review of the RFI documents, potential vendors may have questions to clarify or interpret the RFI in order to submit the best information possible.

Emailed questions shall not in the subject line using "Nonprofit Housing Project Manager Question from <Potential Vendor name>" and directed to: [anthonya.becker@cms.k12.nc.us](mailto:anthonya.becker@cms.k12.nc.us). **Only emailed correspondence is allowed so that a written record of communication is created and shared openly. No phone communication. All additional communications or addenda will be posted on the eVP portal ( <https://eprocurement.nc.gov/> ).**

# EXECUTION OF RFI 163-06252025TB

## INSTRUCTIONS TO RESPONDERS

1. RFI Submission deadline is 3:00pm **Eastern Standard Time** on **July 8, 2025** for furnishing services described herein.  
Electronic versions **ONLY** should be emailed to [anthonya.becker@cms.k12.nc.us](mailto:anthonya.becker@cms.k12.nc.us) with **“[VENDOR’S NAME & FINAL RFI 163-06252025TB – Non Profit Housing Project Manager]”** in the subject line.

**Do not mail in hard copies.**

**Faxed copies will not be accepted.**

2. CMS will review all information supplied and if necessary, schedule a discussion session if it is determined that your solution suits the needs of CMS.
3. Discussions will be scheduled as needed to cover all areas specified in the general requirements.

Acknowledgement Form required to be completed and emailed to [anthonya.becker@cms.k12.nc.us](mailto:anthonya.becker@cms.k12.nc.us) by 3pm Eastern Standard Time on July 8, 2025 with the responders proposal.

**ACKNOWLEDGEMENT FORM**

**RFI #163-06252025TB – Non Profit Housing Project Manager**

Date: \_\_\_\_\_

- A. The undersigned service provider hereby certifies receipt of the Request for Information package for the Charlotte-Mecklenburg Board of Education, Charlotte, North Carolina RFI # \_163-06252025TB – Non Profit Housing Project Manager.

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

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

Company Address: \_\_\_\_\_

- B. Please provide additional contact information below:

Primary Contact Name: \_\_\_\_\_

Contact E-mail address: \_\_\_\_\_

Contact Office phone: \_\_\_\_\_

Contact Mobile phone: \_\_\_\_\_

Secondary Contact Name: \_\_\_\_\_

Contact E-mail address: \_\_\_\_\_

Contact Office phone: \_\_\_\_\_

Contact Mobile phone: \_\_\_\_\_