

Addenda No. 1, Issued on March 12, 2024.



REQUEST FOR QUALIFICATIONS RFQ #2024-001

Developer for Mixed Income Residential, Hospitality & Golf Course Project



Issued by the Local Redevelopment Authority for Roosevelt Roads: March 6, 2024

Statement of Qualifications Deadline for Responders: April 9, 2024

All Proposals must contain one (1) signed original, one (1) electronic copy on USB Drive, and seven (7) hard copies. The materials shall be submitted in sealed packages and addressed to the Local Redevelopment Authority for Roosevelt Roads office at the Puerto Rico Trade and Export Building, #159 Chardón Ave., 3rd Floor, Hato Rey, PR 00918.

Autorizado por la Oficina del Contralor Electoral OCE-SA-2024-04248

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REQUEST FOR QUALIFICATIONS

Developer for Mixed-Income Residential, Hospitality & Golf Course at Roosevelt Roads, Ceiba, Puerto Rico


The Local Redevelopment Authority for Roosevelt Roads (LRA) invites developers with expertise in residential, hospitality, and golf course developments to submit "Statements of Qualifications" (SOQ), for the following project: Mixed-Income Residential, Hospitality & Golf Course.

The purpose of this Request for Qualification (**RFQ #2024-001**) is to ascertain levels of commercial interest and, to the extent possible, shortlist interested developers who demonstrate appropriate qualifications to carry out the Project.

Developers interested in being considered in this pre-qualification process shall submit their "Statement of Qualifications" (SOQ) and experience for the aforementioned project along with references in accordance with the Instructions included in this Request for Qualifications (**RFQ #2024-001**) no later than **April 12, 2024, at 5:00 PM.**

The complete **RFQ #2024-001** documents can be downloaded at <https://rooseveltroads.pr.gov> Additional questions regarding this **RFQ #2024-001** shall be addressed by email at lradepvelopmentr@lra.pr.gov

Cordially,


Joel A. Piza Batiz, Esq.
Executive Director

March 5, 2024
San Juan, Puerto Rico

A. Scope of Work

The Local Redevelopment Authority for Roosevelt Roads (the "LRA") invites developers with expertise in residential, hotel, and golf course developments to submit "Statements of Qualifications" (SOQ) for the following project (the "Project"): Mixed-Income Residential, Hospitality & Golf Course.

The **RFQ #2024-001** process will follow the Local Redevelopment Authority Regulation for the Disposal of Real Estate and the Acquisition of Goods and Services for the Implementation of the Master Development Plan of the Local Redevelopment Authority for Roosevelt Road issued on February 22, 2024, attached hereto as Exhibit B-2 (the "**LRA Regulation (REG_LRA_2024-001)**"). The LRA determined the need to pre-qualify developers for the Project and is seeking a "Statement of Qualifications" (SOQ) from developers interested in participating in the development of all the components of the Project above-mentioned as a single undertaking, not separately.

This notice is for information and planning purposes, to promote competition, and to identify parties having an interest in and resources to support this requirement. It does not constitute a Request for Proposal and is not to be construed as a commitment by the Government of Puerto Rico to enter into a contract.

Interested companies must acknowledge the following as the developer's responsibilities:

- Develop, or cause the development of, sell, lease, and/or manage the Project.
- Demonstrate a willingness to enter into a public/private partnership to implement the redevelopment plan.
- Have experience working under the oversight and control of a local redevelopment authority, federal agency, and/or local governing body.

Statement of Needs

SOQs are solicited for the Project, with a focus on assessing respondents' capabilities and experience in similar ventures. Key evaluation criteria include a proven track record in residential, hotel, and golf course development within the past five years, detailed information on the proposed working group, and qualifications of personnel directly involved. Demonstrated financial strength, supported by publicly available documentation, is vital, along with insights into the respondent's real estate portfolio and recent experience securing financing for comparable projects. Our selection process prioritizes partners committed to delivering outstanding results while addressing the specific needs of the Eastern region of Puerto Rico, in which the Project is located, encouraging proposals that incorporate innovative solutions for sustainable growth and community enhancement.

Our objective is to identify a potential proponent who not only exhibits expertise and financial stability but also shares our dedication to advancing development in the Eastern region of Puerto Rico, in which the Project is located, Proposals should address the unique challenges and

opportunities within this region, advocating for inclusive growth through sustainable design, community engagement, and economic development strategies. By prioritizing the enhancement of the region, we aim to create a development that not only achieves project objectives but also positively impacts surrounding communities, fostering long-term social and economic benefits for all stakeholders involved.

The LRA's delineation of the NSRR Property (defined below) into nine distinct zones aims to provide a flexible framework capable of accommodating various objectives. These zones, detailed within the 2014 Development Zones Master Plan for the Roosevelt Roads Redevelopment (the "Master Plan"), serve as a strategic roadmap for revitalization efforts, catering to a spectrum of sectors and activities. Given the alignment between these zones and the regulatory framework outlined in the LRA's Regulation 8519 dated September 11, 2014 (ROTFU for its Spanish acronym) potential proponent are strongly encouraged to adhere to the directives set forth in the Master Plan. This alignment ensures that development endeavors synchronize with the overarching vision for the Roosevelt Roads Redevelopment, facilitating a unified and sustainable transformation of the former naval station.

Property Description

The LRA owns and leases from the U.S. Department of the Navy (the "Navy") approximately 3,400 acres at the Naval Station Roosevelt Roads in Ceiba, Puerto Rico (the "NSRR Property"), shown on [Exhibit A-1](#). The Project will be developed on an approximately 800-acre site located in Subzones A1, A2, C1, and C2 of the Master Plan (defined below) for the NSRR Property, as further described below and identified in [Exhibit A-2](#) (the "Project Site").

The development combines mixed-income residential, hospitality, golf course, and retail spaces. This Project is of great importance to the LRA as it represents the largest concentration of mixed-income residences available to the public within the NSRR Property.

***Within the project site, there is an area of approximately 27.9 acres known as the "hospital parcel," which is restricted to use only as a hospital and/or care-related services facility. The proponent must keep this in mind when preparing its proposal and comply with such restrictions. Refer to [Exhibit B-6](#).**

Naval Station Roosevelt Roads Property, Background and Opportunities; History of the NSRR Property

The Naval Station Roosevelt Roads (the "NSRR"), including the Project Site, was used as a military installation from its acquisition and development by the Navy in the 1940s until its closure on March 31, 2004. Prior to the Navy's acquisition, the Navy environmental reports identified that NSRR was previously used for sugar cane cultivation and cattle grazing, with no significant industrial facilities or environmental concerns being identified with respect to activities conducted on these lands prior to Navy ownership. The NSRR Property is a truly unique and rare resource, isolated from typical development trends since the early part of the last century and situated at

the foothills of El Yunque National Rainforest—one of the world's greatest natural wonders. The NSRR Property represents an interesting mix of natural ecological areas (approximately 3,340 acres of which are already under the care of the Conservation Trust of Puerto Rico), physical infrastructure, a major airfield with an 11,000-foot runway (already under the care of the Puerto Rico Ports Authority), and waterfront development areas.

Pursuant to Section 8132 of the Department of Defense Appropriations Act for Fiscal Year 2004 (Public Act No. 108-87), the Navy was directed to close NSRR pursuant to the procedures and authorities contained in the Defense Base Closure and Realignment Act of 1990, as amended (Title XXIX of Public Law No. 101-510, 10 U.S.C. §2687 note) (the “Base Closure Act”). The Navy closed NSRR on March 31, 2004, and all industrial and commercial operations on the NSRR Property with a significant potential for environmental contamination ceased.

The LRA and the Navy executed that certain Economic Development Conveyance Memorandum of Agreement between the United States of America acting by and through the U.S. Department of the Navy and the Local Redevelopment Authority for Naval Station Roosevelt Roads dated December 20, 2011, as amended on December 11, 2012, and September 1, 2015 (the “EDC Agreement”) to set forth the terms and conditions of the transfer of land at NSRR to the LRA. Pursuant to the processes outlined in the Base Closure Act and its implementing regulations, and the terms and conditions set forth in the EDC Agreement, the LRA and the Navy have executed numerous deeds, bills of sale, easements, and that certain Lease in Furtherance of Conveyance between the United States of America and the Local Redevelopment Authority for Naval Station Roosevelt Roads at the Former Naval Station Roosevelt Roads, Puerto Rico dated January 25, 2012, as amended on March 20, 2013 and May 6, 2013 (the “LIFOC”).

The LRA divided the NSRR Property into nine (9) zones ranging from an air-side industrial park and institutional clusters to a waterfront district, eco-tourism lodges, and housing (see [Exhibit A-1](#)). These zones are more particularly described in the 2014 Development Zones Master Plan for the Roosevelt Roads Redevelopment (the “Master Plan”), attached as [Exhibit B-3](#). The Master Plan complements the 2014 Regulations on Land Planning and Urban Form of the Former Roosevelt Roads Naval Station (ROTFU, by its acronym in Spanish) published by the Puerto Rico Planning Board, attached hereto as [Exhibits B-4 and B-5](#).

Since the 2004 closure, the Navy has transferred land at NSRR to the LRA for economic development purposes, to the Puerto Rico Ports Authority for airport purposes, to the Puerto Rico Department of Natural and Environmental Resources for conservation purposes, and to the Municipality of Ceiba for municipality purposes.

As a means to negotiate with the Navy, the NSRR Property was divided into three parcels, as shown in [Exhibit B-1](#). The LRA completely controls Parcels 1, 2, and 3 through deeds or the LIFOC. Thus, references to Parcels 1, 2, and 3 are no longer significant but useful for purposes of reviewing due diligence materials.

RFQ Registration Form.

Potential proposers must submit the RFQ Registration Form attached hereto as Exhibit A-3 to the LRA by e-mail at <mailto:lradvelopment@lra.pr.gov> no later than **March 19, 2024** at 5:00pm AST. No Bidder Registration Form will be accepted after this date and time.

Establishment of the LRA

The Roosevelt Roads Naval Station Lands and Facilities Redevelopment Authority Act was enacted on September 29, 2004, and amended on September 18, 2014, on July 10, 2018, and on December 20, 2023 ("Law No. 508"). The LRA is a public corporation and government instrumentality of the Commonwealth of Puerto Rico (the "Commonwealth"). The LRA is governed by a nine-member Board of Directors (the "LRA Board"). The President of the LRA's Board of Directors is the Commonwealth's Secretary of Economic Development and Commerce. The other LRA Board members include representatives designated by the Governor, the President of the Senate, the Speaker of the House, and the mayors of the Municipalities of Ceiba and Naguabo, the towns where the NSRR Property is located. On August 30, 2006, the Office of Economic Adjustment of the U.S. Department of Defense recognized the LRA as the local redevelopment authority for the purposes of implementing the local redevelopment plan at NSRR.

Law No. 508 authorizes the LRA, among other things, to have absolute ownership over its properties; negotiate and grant any contracts, leases, or other agreements necessary or convenient to exercise the LRA's powers and authorities; design, construct, or modify any facility that the LRA considers necessary or convenient; acquire and dispose of property (with the consent of the Legislative Assembly for any sales; provided, however, that such consent is not required when such sales are made to facilitate the development of residential use projects (including condominium projects) and tourism projects (including hotels and condo-hotels); and issue bonds. Law No. 508 authorizes the LRA to function as a public corporation for a period of 40 years from its enactment or until the LRA fulfills the agreements with the Navy.

Surrounding Communities

Communities of the towns of Ceiba and Naguabo adjoin the NSRR Property. The islands of Vieques and Culebra are just a short flight or boat ride away. It is essential to the LRA that these communities are involved in the redevelopment of the NSRR Property.

B. Instructions

Developers interested in being considered shall submit one (1) USB drive with an electronic PDF file and seven (7) hard copies (8-1/2"x 11") of their "Statement of Qualifications" (SOQ), no later than **April 9, 2024, at 5:00 PM.**

Additional questions regarding this **RFQ #2024-001** shall be addressed to lradvelopment@lra.pr.gov

The cover letter shall be addressed to:

Joel A. Pizá Batiz, Esq.
Executive Director
Local Redevelopment Authority for Roosevelt Roads

To the attention of:

Gabriel Hernandez, P.E
Director
Development and Project Management

If delivered by mail, the "Statement of Qualifications" (SOQ) must be addressed to:

Local Redevelopment Authority for Roosevelt Roads
Edificio de Comercio y Exportación
159 Ave. Carlos Cardón, Piso 3
San Juan, Puerto Rico 00918

Submittals shall be enclosed in a sealed manila envelope, properly addressed, and marked "Statements of Qualifications," with the respondent's name and mail address. When sent by mail, each manila envelope containing documents shall be adequately wrapped in or enclosed within an outer envelope, properly addressed, and marked as indicated above to prevent premature opening. The mail services stamped date will be considered as the delivery date.

If delivered by hand, SOQs must be delivered on or before the date and time indicated above to the offices of the Local Redevelopment Authority for Roosevelt Roads located at:

Edificio de Comercio y Exportación, 3rd floor,
159 Avenida Carlos Chardón, Hato Rey - San Juan, Puerto Rico

Regardless of the circumstances, SOQs sent by fax, email, or other electronic means **will not be accepted. They will be automatically rejected/disqualified.**

SOQs delivered after the specified deadline or delivered incorrectly will be rejected/disqualified. Late SOQs will be returned to the submitting company unopened with the notation.

Pre-Proposal Meeting and Property Tour.

A non-mandatory Pre-Proposal meeting will be held on March 19, 2024, at 10:00 am AST at the NSRR offices of the LRA, located on Marina Drive, Roosevelt Roads, Ceiba, Puerto Rico 00735. The location is at the following link: <https://maps.app.goo.gl/sa5rfox1X42apinc9>, or at the following coordinates: 18.227693837796963, -65.61359754198834.

The entrance is at the rear of the building (1205 Bld.). During such a visit, the LRA will provide an overview of this RFP and a tour of the Project Property and answer any questions. The Authority or the Evaluation Committee will not respond to verbal requests except those made at the pre-proposal meeting. Handouts and/or written responses to questions will be posted on the LRA's website at www.rooseveltroads.pr.gov. This pre-proposal meeting and Project Property tour will be the only opportunity for Proponents to visit the Project Property guided by LRA representatives before submission of Proposals. Proponents may visit the portions of the NSRR Property (defined below) accessible to the public during regular access hours, 6:00 am- 6:00 pm AST, without an LRA representative.

C. Submittal Content

The following information shall be included in the envelope to be submitted by the respondent (developer or development team):

1. **Cover Letter** – An introductory cover letter, signed by an authorized representative, of no more than two (2) pages, containing the following information:
 - a. Project title: SOQ for Mixed-Income Residential, Hospitality and Golf Course Development
 - b. Potential proposer's name (developers or teams)
 - c. Mailing and physical address
 - d. Contact person
 - e. Phone numbers
 - f. Brief project approach and executive presentation.
2. **Potential Proposer's Experience in Similar Projects** - Provide a list of at least three (3) projects that demonstrate the respondent's experience in residential, hotel, and/or golf course development projects performed within the last five (5) years. The list must include the project name, a brief scope of work, and a reference contact person with email address or phone number for each project. Limit responses to a maximum of three (3) pages.
3. **Potential Proposer's Capabilities for Project's Execution** - Briefly describe the respondent's working group that will lead the Project. Indicate the personnel who would serve as the project leader and specialist and list specific experience for each person on relevant projects.
4. **Personnel Qualifications** - Provide qualifications of personnel or principal consultants who will serve directly in key positions for the Project, including licenses, certifications, resumes, and professional associations.
5. **Financial Capability** – Submit any publicly available financial documentation, such as annual report(s), which describes the respondent's financial capability. Other information that may be requested:

- a. Composition of real estate portfolio by project and land use on such project.
- b. Comparable recent experience (last 2-3 years) in securing financing, detailing the type of project, financing sources, level of funding, and closing dates.
- c. List of projects currently under planning and development, including those that may adversely affect the respondent's ability to perform and complete the Project.

Failure to comply with any of the requirements contained herein may result in the disqualification of the company.

D. Evaluation

1. Statement of Qualification

Each statement of qualification will be examined by the Selection Committee for compliance with the requirements stated in Section C.

Upon review of the experience and qualification data obtained from respondents, the Selection Committee will prepare a pre-selection short-list of the best qualified respondents. Utilizing the Qualifications Evaluation Sheet included below the Selection Committee will establish an order of qualification of the short-listed firms.

The firms will be evaluated on the basis of their capability to perform successfully all services described. The evaluation criteria include the firm's professional qualifications, expertise, and capacity to deploy the necessary resources and undertake the projects, among other criteria.

For the purpose of development of the requested SOQ, firms may not engage the LRA to obtain information, such as preliminary studies, airport information, and/or other internal information. SOQ shall address specifically the requirements stated in Section C. Site visits will be held and technical data will be shared with the firms during the negotiation phase.

Rating Criteria	Possible Score	Result
Past Experience Record	1 - 20	
Project Understanding	1 - 20	
Past Performance	1 - 15	
Firm Organization	1 - 15	
Capability of the Branch Office	1 - 15	
Personnel Qualifications	1 - 15	
Total Result	-	

2. **Request for Proposal (RFP) & Selection Process**

All Short-Listed potential proposers will be notified of their selection and if it is determined by the LRA, in its sole discretion, that it is in its best interest to proceed with an RFP, they will be invited to participate and submit proposals, all in accordance with the **LRA Regulation (REG_LRA_2024-001)** and applicable laws and regulations.

Immediately after the selection, the firms shall be notified of the final selection results through letters.

E. General Conditions

1. The LRA reserves the right to initiate additional procurement action for any work described in this **RFQ #2024-001**.
2. Communications with the LRA regarding any matter related to the contents of this **RFQ #2024-001** are prohibited during the submission process. Failure to comply with these communication restrictions will result in the rejection of the company's SOQ.
3. Potential proposers acknowledge and recognize that the issuance of this **RFQ #2024-001** does not constitute a commitment by the LRA to award a contract.
4. The LRA is not responsible for any costs or expenses incurred in the preparation of the SOQs.
5. The LRA reserves the right to conduct investigations when apprised of any conflicts of interest with respondents submitting SOQs in response to this **RFQ #2024-001**. The mere appearance of a conflict of interest shall constitute sufficient cause for the outright rejection of an SOQ.
6. The LRA reserves the right (i) to amend, modify, or withdraw this **RFQ #2024-001**, (ii) to revise any requirements of this **RFQ #2024-001**, (iii) to require supplemental statements or information from any respondent, (iv) to accept or reject any or all responses thereto, (v) to extend the deadline for submission of SOQs, (vi) to negotiate or hold discussions with any respondent and to correct deficient responses that do not completely conform to the **RFQ #2024-001** instructions contained herein, and (vii) to cancel, in whole or part, this **RFQ #2024-001**, if the LRA deems it in its best interest to do so. The LRA may exercise the foregoing rights at any time without notice and without liability to any respondent or any other party for its expenses incurred in the preparation of their SOQs hereto or otherwise.
7. Any clarification or correction to this **RFQ #2024-001** will be issued as an Addendum by the LRA and posted on the LRA's website. Only written clarification or correction by Addendum shall be valid. Developer/respondent shall not rely upon any verbal clarification or correction given by any other method.
8. The LRA is under no obligation to select any developer/respondent as a result of this **RFQ #2024-001** and has the right to withdraw the **RFQ #2024-001** at any time.

EXHIBITS

- Exhibit A-1** NSRR Property and Master Plan Zones
- Exhibit A-2** Project Site
- Exhibit B-1** NSRR Property (Parcels 1, 2 and 3)
- Exhibit B-2** Local Redevelopment Authority Request for Proposals Regulation (No. 9366)
- Exhibit B-3** 2014 Development Zones Master Plan for the Roosevelt Roads Development
- Exhibit B-4** 2014 ROTFU
- Exhibit B-5** 2014 ROTFU (cont.)
- Exhibit B-6** Amendment No. 2 Economic Development Conveyance (Hospital Parcel Restrictions)
- Exhibit B-7** Map of Hospital Parcel