

ura

**Urban
Redevelopment
Authority
of Pittsburgh**

REQUEST FOR QUALIFICATIONS (RFQ)

Title and Settlement Services

RFQ Issue Date: Monday, July 17, 2023

Response Due Date: Thursday, August 17, 2023

URBAN REDEVELOPMENT AUTHORITY OF PITTSBURGH

REQUEST FOR QUALIFICATIONS (RFQ)

Title and Settlement Services for URA

Issued on July 17, 2023

GOAL OF THE RFQ

The Urban Redevelopment Authority of Pittsburgh (“URA”) requests qualifications from a variety of firms (“the Applicant”) to provide a suite of title and settlement services to the URA, the Pittsburgh Land Bank (“PLB”), and the URA’s affiliated entities as-needed.

The URA plans to approve one or more Applicants to be part of an approved list of firms to perform the above services for the URA’s Legal and Transaction teams within the URA’s Central Operations Unit. Firms selected for this list will be eligible for selection by the URA to perform services, as-needed, at the URA’s discretion. Each approved firm will remain on the list from the date approved by the URA Board of Directors through December 31, 2026. The RFQ process may be revisited during this period to invite additional firms to qualify to provide these services.

BACKGROUND

The URA is the City of Pittsburgh’s (City) economic development agency, committed to fostering sustainable prosperity across all of Pittsburgh. Incorporated in 1946 as one of the first redevelopment authorities in the United States, the URA achieves this mission by assembling, preparing and conveying sites for major mixed-use developments; and by providing a portfolio of programs that include financing products, relocation and expansion, housing construction and rehabilitation and home purchases and improvements. The URA conducts these activities using unique powers granted by the Commonwealth’s Urban Redevelopment Law to deploy and attach conditions to the use of public subsidy and the disposition of publicly-owned land.

OBJECTIVES

The URA seeks to create a panel of qualified firms to conduct as-needed services related to title and settlement work. To effectively accomplish the URA’s objectives, the URA is soliciting information from interested firms on their ability to perform these services, including scale, volume and price structure.

GENERAL INFORMATION

The URA researches and acquires approximately 100 parcels annually. These properties can be broken down into two main categories: private arm’s-length transactions, and public transactions. Public

transactions comprise the bulk of the URA's acquisitions purchased from the City of Pittsburgh's Three Taxing Bodies' inventory.

As these property acquisitions vary greatly in the types and complexity of title-related services required, the URA has set a fixed rate of payment for some components of this work. However, the Applicant(s) may submit a fee schedule for other services the Applicant(s) would be interested in performing under contract for this work.

SCOPE OF SERVICES

Applicants shall provide one or more of the services listed below to include in their Response:

- Title Examinations*
 - Title Commitment
 - Current Owner Search
 - Lien Search
- *See Supplemental Information for requirements for Title Commitments for Three Taxing Bodies' inventory
- *Set fee for Title Commitments for Three Taxing Bodies' inventory:
- \$400 per parcel
 - \$50 bonus if completed and delivered under 30 calendar days
- Preliminary Title Reports
 - Closings
 - Property Acquisitions
 - Related Deed Recording and fee payment activities
 - Satisfaction of Dockets
 - Property Dispositions
 - Tax certificates
 - No Lien letters
 - Dye Test
 - Zoning Certifications
 - Title Insurance Underwriting**

**The URA follows the Real Estate Settlement Procedures Act (RESPA) fee schedule for title insurance services
 - Title Research, as described below

TITLE RESEARCH

This specialized service is needed when URA acquires tax-foreclosed properties from the City of Pittsburgh. This service entails reviewing title commitments to ensure that all liens and potential claimants are included in the commitment and obtaining revisions as needed; locating former owners and lienholders; and preparing contact sheets and mailing labels that the City of Pittsburgh will use to serve defendants in a quiet title action. The completed title research work product includes:

1. The title commitment (revised as necessary following review)

2. Printout of liens on property from court website
3. Printout of liens on owner from court website
4. File Copy (City of Pittsburgh form)
5. Copy of the Treasurer's Sale deed book page
6. Contact Sheet (City of Pittsburgh form) for each defendant
7. Certified Mail forms for each defendant
8. Copies of any research used to locate defendants/heirs
9. Summary (City of Pittsburgh form)

QUALIFICATIONS

The selected Applicant must have:

- An experienced staff with the expertise to address all questions that may arise, including complex title questions
- The ability to conduct settlements, clear title exceptions, etc.
- Personnel with legal expertise competent to appear and testify in court if required
- A sufficient number of examiners and title officers to promptly examine titles and hold settlements
- Sufficient office space to hold settlements and preserve records
- The ability to transmit title reports electronically

The selected Applicant(s) must demonstrate sufficient financial ability to indicate that it can pay losses, if any, under the title insurance issued.

SUBMISSION REQUIREMENTS

The Applicant shall submit a proposal package ("Response") containing the following:

1. Title Page – Include the Applicant's name, contact person and contact information
2. Table of Contents
3. Primary Qualifications - Provide a brief narrative that explains why your organization is well qualified to provide the services for which your firm would like to be considered. Briefly describe similar work your firm or team has completed.
4. Firm Profile - Provide a brief profile of your organization, including:
 - i. Number of total employees; and
 - ii. Number and names of employees who will be dedicated to the work under the Scope of Services
5. Biography of Key Personnel - Identify the staff within the organization who will be actively working on the Scope of Services. Please include the individuals' relevant experience and their work location.
6. References - Provide three (3) references from entities that have worked with your organization on similar projects. Provide only references who have directly worked with one or more members of the organization's proposed team. Include the reference's name, title, address, direct telephone number, and email address.
7. Minority and Woman-Owned Business Enterprise Participation (MWBE) – The URA is committed to diversity and inclusion within all of its programs and other activities. The URA encourages the

full participation of minority and women business owners and professionals in this effort. The URA requires that all Applicants demonstrate a good faith effort to obtain minority and women-owned business participation in work performed in connection with URA initiatives.

An MWBE narrative needs to be included with the Applicant's Submission. The narrative should outline how the Applicant plans to incorporate MWBE participation into this opportunity. MWBE participation can be satisfied by:

- i. Ownership/Partnership of firm (please note that ownership is defined as 51% or more);
- ii. Use of minorities and/or women as part of the contracting team;
- iii. Subcontracting with organizations owned and controlled by minorities and/or women;
- iv. Firm's use of minority or women-owned businesses, in general, as vendors for legal, printing, office supplies, travel, etc.

Any questions about MWBE requirements should be directed to the URA's MWBE Program Office at mwbe@ura.org

8. Fees – Except for the title commitments for Three Taxing Bodies' inventory as indicated in the scope of services, and the standard RESPA fee schedule for title insurance services, describe your proposed fee structure (e.g., hourly, fixed fee per item, etc.) and include proposed rates.
9. Other Information - Please provide any other information which you believe is pertinent to the URA's consideration of your firm.

INQUIRIES

All inquiries related to this RFQ are to be submitted through ION Wave Technologies, the URA's RFP and RFQ platform, where the Response will be made public.

RESPONSE SUBMISSION

DEADLINE: Thursday, August 17, 2023

Applicants must submit their Response using IonWave Technologies. The Response should be combined into one file in PDF format. Do not send hard copies.

Link to IonWave Technologies: <https://ura.ionwave.net/Login.aspx>

ALL RESPONSES MUST BE RECEIVED THROUGH IONWAVE TECHNOLOGIES.

If you have any questions or issues with using IonWave, please contact:

Attention: Ivy Coleman
icoleman@ura.org

SELECTION

- The qualifications review committee (“Committee”) will consist of the members of the URA Legal, Compliance and Transaction departments.
- The Committee will check Responses against mandatory criteria. Responses not meeting all mandatory criteria will not be considered for review.
- Formal interviews of Applicants may be scheduled at the discretion of the Committee.
- During the evaluation process, the URA reserves the right to request additional information or clarification from the Applicant(s) or to allow corrections of errors or omissions.
- The Committee shall recommend to the URA Board of Directors a list of Applicant(s) based upon their response to this RFP.

SELECTION CRITERIA

- Experience – The Applicant’s experience in providing services similar to those within the Scope of Services described herein; the quality of the Applicant’s management, reputation and references; the Applicant should have at least 3-5 years of experience providing the services specified in its response to organizations like the URA.
- Quality of Submission – The quality of the submission and the degree to which it demonstrates the team members’ full understanding of the ability to perform the services to be rendered; the content of the Response should demonstrate the Applicant’s full understanding of the Objectives, along with sample materials.
- MWBE – Respondent’s strategy for incorporating MWBE participation in this opportunity.

Mandatory Elements

1. The Applicant, including any and all team members, must have no conflict of interest with regard to any other work performed by the Applicant for the URA or related entity.
2. The Applicant must adhere to the instructions contained in this RFQ in preparing the Response.
3. The Applicant must include an MWBE narrative.

LEGAL INFORMATION

The URA intends to select one or more Applicants based upon information in the Response, the Applicant’s performance in previous undertakings, and other pertinent factors. The selected Applicant(s) will be chosen on the basis of the selection criteria listed above.

1. The URA shall have the right to verify the accuracy of all information submitted by the Applicant, and to make such investigation as it deems necessary to determine the ability of each Applicant to perform the services set forth in the Response. The URA in its discretion reserves the right to reject any Response when the available evidence or information does not satisfy the URA that the Applicant is qualified to carry out properly the services set forth in the Response.

2. The URA shall be the sole judge as to which, if any, Applicant best meets the selection criteria. The URA reserves the right to reject any or all Response(s), to waive any submission requirements, and to waive any irregularities in any Response.
3. This RFQ is submitted subject to errors, omissions, and/or withdrawal without notice by the URA at any time.
4. All Responses, including attachments, supplementary materials, addenda, etc. shall become the property of the URA and will not be returned.
5. Applicant's members must disclose any conflict of interest, or potential conflict of interest, with regards to any employee or staff of the URA or the City of Pittsburgh, and/or any work performed by the Applicant for the URA, the City of Pittsburgh, or any related entity.

SUPPLEMENTAL INFORMATION

Three Taxing Bodies Property Title Commitment Requirements

- 1) Purchaser's name
- 2) Legal description of property & recital
 - a) Property description including Ward, Plan Lot(s), etc.
 - b) Block and Lot
 - c) Treasurer's deed date, Deed Book Volume and Page number
- 3) Mortgage(s)
 - a) Mortgagees and addresses as shown in mortgage
 - b) Assignment of Mortgage if applicable with pertinent filing information
 - c) Assignees and addresses, if applicable
- 4) Judgment(s) (All filing information MUST BE INCLUDED)
- 5) Federal taxes and liens (All filing information, i.e. place of filing, docket number, etc. MUST BE INCLUDED)
- 6) Other taxes/liens (All filing information MUST BE INCLUDED)
 - a) City of Pittsburgh
 - b) School District of Pittsburgh
 - c) County of Allegheny
 - d) Commonwealth of Pennsylvania
 - e) United States of America
- 7) Adverse Conveyances
- 8) Ejectment and Miscellaneous
- 9) Exceptions
- 10) The following paragraph identifying parties, defendant MUST be included:

TITLE to within described property having been acquired by CITY OF PITTSBURGH, for delinquent taxes, it is necessary to quiet title by bringing proceedings under Act No. 171 of 1984, 53 P.S. 27101, et seq., with notice naming parties Defendant given to owners or reputed owners, their heirs, administrators, executors, successors and assigns, lienholders, mortgage holders, etc. as follows:

All of which parties may, or may not, have interests in said premises, the title is hereby certified (insured) to proposed purchasers, or successful bidders, to be good and marketable, free and clear of all liens (encumbrances).

- 11) Complete name and address of firm/attorney submitting report. Document must contain original signature and be currently dated.

NOTE: Items #3 through #9 must be addressed. If information is not warranted, item(s) must reflect the phrase "NONE".