

Request For Qualifications County of Fresno

Number: PWP23-010

For Consultant Services For Housing Trust Services

Date Released: March 14, 2023

Statement of Qualifications (SOQs)

Due prior to: 4:00 PM, Monday, April 3, 2023 Pacific

SOQs will be received at:

<https://www.bidexpress.com/businesses/36473/home>

Inquiries and Requests For Clarification (RFCs):

Due: 12:00 PM (Noon), Monday, March 27, 2023 Pacific

<https://www.co.fresno.ca.us/departments/public-works-planning/request-for-proposals>

Sign up for updates and addenda:

<https://www.co.fresno.ca.us/departments/public-works-planning/request-for-proposals>



Department of Public Works and Planning

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Attachments

Attachment A: Consultant Evaluation Sheet

Attachment B: Fresno County LEAP Application

1. Project Overview

Fresno County Department of Public Works and Planning (Department) is seeking a qualified consultant to perform a feasibility study of the creation of an affordable housing trust fund (AHTF) and the option to create the documents necessary for the formation of a AHTF in the County of Fresno.

It is the intent of the County to enter into an agreement with one consulting company to exclusively provide the professional services as described herein for a one-time service. However, the County reserves the right, at its sole discretion, to terminate this RFP process or negotiations with a selected company and begin a new RFP process. Nothing herein, or in the process, shall be construed as having obligated the County to pay for any expenses incurred by respondents to this RFP, or to the selected company prior to Board of Supervisor approval of an Agreement.

2. Background Information

County of Fresno

The County of Fresno was formed in 1856 encompassing 6,011 square miles, with a population of 1,018,241 residents (reported from the Department of Finance in January 2019). The County is located in the San Joaquin Valley of California located north of Bakersfield and south of Sacramento. The original county seat was located in the town of Millerton along the San Joaquin River, which was later moved to the City of Fresno due to

continued flooding at the river site. County of Fresno government is defined and authorized under the California Constitution, law, and the Charter of the County of Fresno, and provides countywide services, including elections, voter registration, law enforcements, jails, vital records, property records, tax collection, public health and social services. In addition, the County serves as the local government for all unincorporated areas.

Project Background

The creation of a study that would assist an agency to create a housing trust (local or regional) that would leverage funds to assist in the building of additional affordable housing units. The study would research the different types of trust that can be created, the advantages and disadvantages of each type of trust and identify potential agencies and partners. Additionally, the study would determine if the trust should be a local trust for the unincorporated portion of the County of Fresno a Countywide trust or a Central Valley trust encompassing several counties. The Affordable Housing Trust Feasibility Study is funded by a LEAP grant awarded to the County. The total costs shall not exceed the grant total of \$95,000. Additional information is outlined in the Fresno County LEAP Application (Attachment B).

Project Approach

The deliverables of the feasibility study shall include an analysis of the following:

Task 1: Affordable Housing Trust Analysis

- Analyze different types of housing trusts along include the pros and cons of each
 - County of Fresno only
 - County of Fresno and its cities
 - Regional Trust of one or several counties
- Best trust recommendations for the County and justifications
 - Experience and skills necessary to manage the trust
 - Type of entity to manage the trust
 - Existing Agency
 - New Agency
 - Nonprofit
 - CDFI

- Identify agencies and/or parties interested and/or able to administer the AHTF

Task 2: Prospective Partners and Stakeholders

- Assessed desire from nearby cities/counties to join the trust
- Conduct meetings with potential partners to explain the proposals and build consensus

Task 3: Funding Sources and Sustainability

- Analysis and Recommendations of funding sources for sustainability
 - Membership fee
 - Grants
 - Loan fees and interest
- Implementation Plan
 - Creation of an implementation plan

Task 4: Implementation Plan Documents (Optional)

- Develop the required documents necessary for the creation/incorporation of the AHTF.
 - Article
 - Bylaw
 - Board Structure
 - Prepare policy and procedures
 - Administration
 - Membership
 - Lending
 - Grants

The County expects this project to be completed in approximately three months. The study should be completed by the end of April to mid-May with documents to be received by the County in May with a one-to-two-week time allowed to review. The feasibility study is due June 2023 and if selected the implementation documents are to be finalized by July 15, 2023.

Scope of Work

Consultants are encouraged to present suggested modifications to the scope of their proposals to meet the goals and objectives of the RFP. The scope of work includes:

A. Project Management

- a. Project Kick-Off Meeting: Meet with County staff to identify milestones, refine the scope of work, confirm timeline, clarify specific roles and responsibility, and identify project resources. Meetings can be conducted via Teams or Zoom.
- b. Management Tools: Identify tools and methods that will be used to keep the project moving on time and within budget. Consultant should anticipate meetings with County staff throughout the project, including regular conference calls and in person or virtual group meetings at key milestones.

B. Meetings

- a. Plan for biweekly meetings with County staff to review locations, site concepts and coordinate ideas
- b. Final project presentation meeting

Requested Consultant Services

A. Preferred Consultants:

- a. The County does not have a preferred consultant for this project but reserves the right to select either a team, managed by a lead consultant, or to select individual consultants to provide the different deliverables of the feasibility study.

B. Roles:

- a. County staff will coordinate with the consultant on all work products.

C. Expertise

- a. This RFP was provided to consulting firms with specific skills to accomplish one or more deliverables. The most competitive consultant will be made up of a multi-disciplinary team with the expertise is to prepare a Housing Trust.

D. Required Meetings

- a. Project Kick-off Meeting
- b. Biweekly check-in Meetings
- c. Final Project Presentation

3. Anticipated Schedule

The tentative project delivery schedule is as follows:

- Inquiry Submittal deadline *March 27, 2023, 4:00 P.M.*
- Proposal due from Consultant: *April 3, 2023, 12:00 P.M. (Noon)*
- Notice of approval/fee negotiation: *Week of April 3, 2023*
- Executed agreement: *Week of April 10, 2023*
- Completion and submittal Task #1: *May 1, 2023*
- Completion and submittal Task #2: *May 8, 2023*
- Completion and submittal Task #3: *May 22, 2023*
- Completion and submittal Task #4 (Optional): *June 12, 2023*
- Completion and final submittal: *June 15, 2023*

4. Services Required

The Consultant shall propose a schedule for the completion of the identified deliverables in accordance with the programming for the project. The Consultant is encouraged to identify any factors that will or may affect the completion of the project and to discuss the means, if any, of minimizing their impact on the schedule. The fee proposal shall be prepared to match the tasks listed in the Consultant's proposed project schedule.

All invoices for work performed under this RFP must reference the mini-RFP number listed above and, in the case of multiple Tasks, the Task Number(s) for the invoiced work.

5. Services Performed by the County

Services performed by the County shall include, but are not necessarily limited to, hiring consultant, reviewing feasibility study and possible housing trust documents, providing feedback, accepting documents, conducting outreach as deemed necessary, and project tracking and reporting.

6. RFP Submittal Requirements

The Department will review each Proposal to determine the competence and qualifications of the company. Please provide the listed information in the following sequence:

1. Company name, address, phone number, and email address
2. Type of organization (sole-proprietorship, partnership, or corporation)
3. A list of names containing: the majority owner(s), any employees promoting the contract, and any employees responsible for the proposal (SB 1439)
4. Agreement Statement. The proposing Consultant shall disclose any issues or needed changes to the proposed contract agreement included as Attachment D Sample Agreement. The Consultant shall provide a brief statement affirming that the proposal terms shall remain in effect for ninety (90) days following the date proposal submittals are due.
5. Company principals who will be responsible for the agreement, and their educational background, credentials and experience
6. Company qualifications to perform the work.
7. List the name, phone number, and email address of at least four additional client references

Do not submit more information than requested in this RFP.

Instructions

Register with the Bid Express service in order to submit your proposal on the Bid Express website. This service is FREE to submit a proposal for Fresno County (the County has paid a fee to Bid Express for this service, so no fees should be charged to you). To access the solicitation for free, do not use the "Start your subscription" button, but choose "I will pay as I go for now." A Digital ID is not required in order to use this service (electronic signature is selected by default and either "electronic signature" or "Digital ID" is acceptable).

Where attachments are requested, each requested document must consist of a separate file with a maximum of 10MB per file. Additional file upload fields are provided, each of which has a 10 MB limit which may be used for larger documents. Example: If a requested

document is 15 MB, split the document into 2 files with filenames of Filename-1 of 2.pdf and Filename-2 of 2.pdf and attach Filename-1of2.pdf in the usual file upload field and upload Filename-2of-2.pdf under “Additional Documents (Use if needed).”

7. Evaluation

Department staff will evaluate the provided RFPs and Fee Schedules and make a recommendation to the Fresno County Purchasing Manager on the selection of the consulting company. The Department will assess each Request for Proposal based upon the criteria contained in Attachment A.

The County reserves the right to conduct a background inquiry of each proposer which may include collection of appropriate background history information, contractual and business associations and practices, employment histories and reputation in the business community. By submitting a RFP to the County, the proposer consents to such an inquiry and agrees to make available to the County such books and records the County deems necessary to conduct the inquiry.

8. Fee Determination

The term of the Agreement will be a one-time service. Maximum total fee will be based upon Fee Schedule submitted with bid and the anticipated services. Total fees paid to the consulting company will be dependent upon the work authorized and the Fee Schedule provided. No guarantee is made that the total fee or any fee will be received by the consulting company.