

REQUEST FOR QUALIFICATIONS

**HOUSING CONSULTING SERVICES
SAN JOAQUIN VALLEY REGIONAL EARLY ACTION PLANNING**

**Fresno Council of Governments
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Additional background information on this proposal can be found on the
Fresno COG website!

www.fresnocog.org

November 6, 2020

REQUEST FOR QUALIFICATIONS (RFQ)

SAN JOAQUIN VALLEY REGIONAL EARLY ACTION PLANNING

Fresno Council of Governments (Fresno COG) is requesting qualification submittals from affordable housing, real-estate economics, land-use, urban design, architecture, urban and regional planning, engineering, public outreach, and related consultants and organizations for the purposes of providing ongoing and as-needed consulting services in support of the Regional Early Action Planning program for the eight-county San Joaquin Valley.

BACKGROUND

The Regional Early Action Planning (REAP) program was established by AB 101 to provide regions and jurisdictions with one-time grant funding for planning activities to meet the sixth cycle of the regional housing needs assessment (RHNA), and to spur affordable housing production. The eight San Joaquin Valley Regional Planning Agencies will use its REAP funding for RHNA planning, suballocations to jurisdictions for housing planning, and for a series of regional ("Valleywide") planning activities. The Valleywide planning activities are the primary focus of this RFQ.

Fresno COG has been designated as the lead fiscal agency for the eight-county REAP planning effort. To date, funding applications for the region have been submitted and awarded to the San Joaquin Valley, and the San Joaquin Valley Regional Early Action Committee for Housing (SJV REAP Committee) has been established. The SJV REAP Committee consists of 24 members of the San Joaquin Valley regional planning agencies, cities, counties and community members and will help guide the REAP effort. The San Joaquin Valley Regional Planning Agencies' Directors' Committee will also advise the REAP program implementation process.

PLANNING ACTIVITIES

The REAP program is a new program and hence will require flexibility in Fresno COGs ability to engage consultants for various planning activities through December 31, 2023. This request for qualifications will establish a short-list of qualified consultants to competitively propose for individual bid offerings through the program term.

The following is an initial list of Valleywide REAP planning activities that may be conducted throughout the term of the REAP program:

- Comprehensive Housing Report for the San Joaquin Valley
 - Conduct an analysis of existing conditions relating to housing inventory, planning and production trends in the San Joaquin Valley.
 - Identify local and statewide barriers to housing production.
 - Identify jurisdictional and regional best practices related to housing production.
 - Provide policy and strategy recommendations to enhance housing production throughout the region.
- Develop education and outreach strategies to inform local agencies of the need and benefits of taking early action related to the sixth cycle regional housing needs allocation.
- Develop public engagement and educational strategies to build support from local elected officials, stakeholders, and the public on a variety of housing policies that encourage affordable housing.
- Develop a GIS based inventory of available sites/surplus property that includes site and surrounding amenities information for affordable housing programs such as AHSC (Affordable

Housing and Sustainable Communities program) and tax credits, and housing element related sites inventory analysis and reporting.

- Develop standard cottage, accessory dwelling unit, single and multi-family infill plans that meet building and Title 24 codes and can be utilized across the region.
- Develop template programs for implementation such as development fee impact reduction programs, linkage fee programs, and others.
- Provide technical assistance to cities, counties, regional planning agencies, and non-profit developers to facilitate housing planning and production.
- Provide jurisdictions with technical assistance, planning, temporary staffing, or consultant needs associated with updating local planning and zoning documents, expediting application processing, and other actions to accelerate additional housing production.
- Assist cities and counties in implementing Pro Housing Policies from HCD (State of California Housing and Community Development) including favorable zoning, decreasing production timeframes, reducing production costs, and financial mechanisms.
- Assist and provide technical assistance for the suballocations of money directly and equitably to jurisdictions or other sub regional entities in the form of grants for planning that will accommodate the development of housing and infrastructure that will accelerate housing production in a way that aligns with state planning priorities, housing, transportation, equity, and climate goals.
- Provide technical assistance for Affirmatively Furthering Fair Housing.
- Provide technical assistance for developing a planning academy (educate and engage on planning processes) for staff. e.g. City of Sacramento's Citizen's Planning Academy.
- Develop regional toolkits on a variety of housing-specific topics such as objective design and development standards, housing finance strategies, planning adaptation, CEQA streamlining, by-right zoning, ADUs (accessory dwelling units), infrastructure environmental justice, equity and housing elements.
- Establish regional or countywide housing trust funds for affordable housing.
- Perform infrastructure planning to include sewers, water systems, transit, roads, or other public facilities necessary to support new housing and new residents.
- Perform feasibility studies to determine the most efficient locations to site housing.
- Perform feasibility studies for affordable housing projects on surplus properties owned by school districts of county offices of education.
- Other activities as determined.

COORDINATION

The consultant will take primary direction from the Fresno COG Project Manager, in consultation with the San Joaquin Valley Housing Program Manager. It is intended that all work will be completed within reasonable time frames of negotiating a contract and that the consultant's work will begin immediately upon receiving a notice to proceed.

File copies of all correspondence, technical memoranda and reports should be delivered to the Fresno COG Project Manager in electronic format.

All data, maps and all other materials prepared or collected under this contract will become the property of Fresno COG. Selected consultants will provide monthly progress reports to the Fresno COG Project Manager. These monthly status reports will include descriptions of work tasks completed that month, and will identify any issues that may affect project schedule or project deliverables.

Proposed Time Schedule

Activity	Date
Request for Qualifications released	November 6, 2020
Deadline for submitting questions	November 20, 2020
Deadline for Qualifications Submittal	December 1, 2020 at 5 pm (Pacific Standard Time)
Short-list of Qualified Consultants established	December 14, 2020
Oral interviews/selection process	Ongoing, subject to individual bid offerings
Anticipated Notice to Proceed	Ongoing, subject to individual bid offerings
Anticipated Completion of project	December 31, 2023, or sooner

CRITERIA FOR SELECTION

Clarity and succinctness are essential and will be considered in assessing the consultant's capabilities. Qualifications submittals that show creativity and new ideas are especially valued. All consultant qualifications submitted will be screened by a review committee. The committee will determine, through the screening process, a short-list of qualified consultants to be invited to respond to individual bid offerings throughout the term of the REAP program.

Consultants who are selected for the short-list of qualified consultants shall demonstrate:

- Expertise in one or more of the proposed REAP planning activities.
- Experience in working in San Joaquin Valley communities, and disadvantaged communities.
- Proven track record of success in conducting previous related work efforts.
- Availability, responsiveness, and cost control effectiveness.

The selection committee reserves the right to select one or more qualified consultants to respond to any individual bid offerings. The selection committee has the right to reject all consultants for any individual bid offering. The selection committee has the right to contract solely with any qualified consultant for any individual bid offering, at any time. Responding to this RFQ does not guarantee your firm or organization will be deemed a qualified consultant for the purposes of conducting any work efforts arising from the REAP program.

QUALIFICATION SUBMITTAL REQUIREMENTS

To simplify the review process and maximize the degree of comparative analysis, the Qualifications Submittal should be organized in the following manner:

A. Transmittal letter

The transmittal letter should be signed by an official authorized to bind the consultant contractually for any work arising from this RFQ process for the term of the REAP program. The letter will provide the following: name, title, address, and telephone number of individuals with the authority to negotiate and contractually bind the company. The transmittal shall contain a statement of understanding of the RFQ.

B. Overview

This section should clearly convey the consultant's understanding of the nature of the work and the general approach to be taken to its performance. This section should include, but not be limited to, an identification of proposed REAP activities the consultant has expertise in, a discussion of the purpose of the project, the organization of the project effort, and a summary of the proposed approach for those activities that the consultant has expertise in.

C. Management Approach and Summary of Qualifications

This section should describe the firm's management approach. If the proposal is a team effort, the distribution of work among the team members should be indicated. Describe the organization of the management, the structure of the work assignments, and any specific features of the management approach that require special explanation. Designate by name the project manager to be employed who will oversee the project. **No substitutions of the identified project manager will be allowed without prior approval of Fresno COG.**

Include the name and qualifications of all professional personnel to be employed, including a resume for each professional. Staffing assignments should be specific enough to demonstrate understanding of skills required and commitment of proper resources. **The selected consultant will not substitute members of the project team without prior approval of Fresno COG.**

D. Previous Work Experience

Provide a full and detailed list of previous related work assignments. Please describe the scope of work, client, client contact information, deliverables, time that the work effort occurred, outcomes, and any other relevant information. Copies of one or two final reports/deliverable from a previous work assignments can be accepted and should be included as an appendix to the Qualifications Submittal.

E. Conflicts of Interest

The prospective contractor shall disclose any financial, business, or other relationship with Fresno COG that may have an outcome on the selection.

F. Insurance Requirements

Without limiting Fresno COG's right to obtain indemnification from the consultant or any third parties, the consultant, at its sole expense, shall maintain in full force and affect the following insurance policies throughout the term of the contract, if awarded:

- a. Comprehensive general liability insurance with coverage of not less than \$2,000,000 combined single limit per occurrence for bodily injury, personal injury, and property damage. Comprehensive general liability insurance policies shall name Fresno COG, its officers, agents, and employees, individually and collectively, as additional insured, but only insofar as the operations under the terms of the contract are concerned. Such coverage for additional insured shall apply as primary insurance or self-insurance and any other insurance, maintained by Fresno COG, its officers, agents, and employees, shall be given excess only and not contributing with insurance provided under the consultant's policies herein.
- b. Comprehensive automobile liability insurance with limits for bodily injury of not less than \$25,000 per person, \$250,000 per accident, and for property damages of not less than \$50,000, or such coverage with a combined single limit of \$250,000.
- c. Professional liability insurance of at least \$1,000,000.
- d. Worker's compensation insurance as required by law.

This insurance shall not be canceled or changed without a minimum of thirty (30) days advance written notice given to Fresno COG. The consultant shall provide certification of said insurance to Fresno COG within twenty-one (21) days of the date of the execution of the contract. Such certification shall show, to Fresno COG's satisfaction, that such insurance coverages have been obtained and are in full force; that Fresno COG, its

officers, agents, and employees will not be responsible for any premiums on the policies; that as and if required such insurance names Fresno COG, its officers agents, and employees individually and collectively as additional insured (comprehensive and general liability only), but only insofar as the operations under the contract are concerned; that such coverage for additional insured shall apply as primary insurance and any other insurance, or self-insurance, maintained by Fresno COG, its officers, agents, and employees, shall be excess only and not contributing with insurance provided under the consultant's policies herein; and that this insurance shall not be canceled or changed without a minimum of thirty (days) advance, written notice given to Fresno COG.

In the event the consultant fails to keep in effect at all times insurance coverage as herein provided, Fresno COG may, in addition to other remedies it may have, suspend or terminate the contract upon the occurrence of such event.

The Consultant shall provide proof of insurance prior to entering a contract with Fresno COG.

G. Disadvantaged Business Enterprise (DBE) Certification

DBE Bidders Listing (Attachment B) must be completed for all contractors and subcontractors regardless of DBE affiliation.

The Fresno COG fully anticipates that it will consistently meet and exceed its adopted DBE overall goal under 49 CFR Part 26 using Race-neutral measures exclusively.

Only DBE firms currently certified per 49 CFR Part 26 will participate as DBEs in our program. Such certification must be issued by Caltrans, FHWA, FTA, DOT, MPO, City, County, or State in accordance with 49 CFR Part 26. All contractors or subcontractors claiming to be a certified DBE must provide a valid DBE certification.

Fresno COG will not deny award to contractors on the basis of DBE participation, who demonstrate that they have used good faith efforts to achieve DBE participation.

Contractors must provide the following information with the initial proposal or before entering into a contractual agreement with Fresno COG:

1. The name, addresses, & phone number of all bidding firms.
2. NAICS code by firm.
3. The dollar amount of participation by each firm (please put "NA" in this column)
4. Proof of DBE certification if claimed.
5. Written confirmation named DBE's will participate.
6. If DBE participation is not achieved, evidence of good faith efforts may be required.

Prime contractors are required to maintain records and document payments to all subcontractors for three years following the performance of the contract. These records will be made available for inspection upon request by any authorized representative on Fresno COG, Caltrans, FHWA, FTA or DOT. This reporting requirement also extends to any certified DBE subcontractor. The contractor shall maintain records showing the name and address of each subcontractor, the date of payment, and total dollar figure paid to each subcontractor.

Fresno COG will safeguard from disclosure to third parties information that may reasonably be regarded as confidential business information, consistent with federal, state, or local laws.

H. Attachments

Attachments to be included at the end of the Qualifications Submittal are as follows (as attached herein):

- Attachment A: Title VI Assurance (attached)
- Attachment B: DBE Participation (attached)
- Attachment C: Final Reports/Deliverables from Previous Work Experiences

QUALIFICATIONS SUBMITTAL

A. Preparation of Submittal

The Qualifications Submittal shall be formatted in accordance with the requirements specified in the *Qualification Submittal Requirements* section of this RFQ. All proposals shall be prepared by and at the expense of the proposer.

B. Examination of RFQ Document

The proposer shall be solely responsible for examining, with appropriate care, the RFQ, including any addenda issued during the proposal period. The proposer shall also be responsible for informing itself with respect to any and all conditions which may in any way affect the amount or nature of the proposal, or the performance of the work in the event the proposer is selected. Failure of the proposer to examine and inform itself in this manner shall be at the proposer's own risk and no relief for error or omission shall be given.

C. Submission of Qualifications Submittals/Period of Acceptance

One reproducible master, an electronic file on CD/flash drive and three printed copies of all qualification submittals must be delivered to Fresno COG no later than **December 1, 2020 at 5 pm Pacific Standard Time**. Qualification Submittals will not be accepted after 5:00 P.M. PST. Postmarks will not be accepted. Qualification submittals should be delivered to:

Robert Phipps, Project Manager
Fresno Council of Governments
2035 Tulare Street, Suite 201
Fresno, CA 93721

All Qualification Submittals will remain firm for a period of two years following the final date for submission. All qualification submittals will become the sole property of Fresno COG and a part of its official records without obligation on the part of Fresno COG.

This RFQ is not to be construed as a contract of commitment on the part of Fresno COG. Fresno COG reserves the right to reject all proposals, to seek additional information from each proposer, or to issue another RFQ, if deemed appropriate.

CONSULTANT SELECTION

All consultant qualifications submitted in response to this request will be screened by a selection committee. The committee will determine, through the screening process, a short-list of qualified consultants to be invited to propose on individual bid offerings throughout the term of the REAP program.

The selection committee reserves the right to select one or more qualified consultants to respond to any individual bid offerings. The selection committee has the right to reject any and all consultants for any individual bid offering. The selection committee has the right to contract solely with any qualified consultant for any individual bid offering, at any time. Responding to this RFQ does not guarantee your firm or organization will be deemed a qualified consultant for the purposes of conducting any work efforts arising from the REAP program.

The actual award of any contract will be by the Fresno COG Policy Board. Responding to this RFQ does not constitute the awarding of a contract. No contract is in force until it is awarded by Fresno COG and executed by the Fresno COG designees.

OBJECTIONS

A responding entity or organization may object to any of the terms or provisions set forth in the RFQ's on the grounds that Fresno COG's procedures, the provisions of this RFQ, or applicable provisions of federal, state, or local law have been violated or inaccurately or inappropriately applied by submitting Fresno COG a written explanation of the basis for the objection. Deadlines for submittal of objections are:

- No later than two weeks prior to the date Qualification Submittals are due, for objections to RFQ provisions; or
- Within three working days after the date on which a contract award is authorized or the date the proposer is notified that it was not selected, whichever is later, for objections to proposer selection.

FRESNO COG RIGHTS

Fresno COG may investigate the qualifications of any proposer under consideration, require confirmation of information furnished by a proposer, and require additional evidence of qualifications to perform the work described in this RFQ.

Fresno COG reserves the right to:

1. Reject any or all of the submittals if it deems such action is in the public interest;
2. Issue subsequent Requests for Qualifications;
3. Cancel the entire Request for Qualifications;
4. Remedy technical errors in the Request for Qualifications process;
5. Appoint an evaluation committee to review the proposals;
6. Seek the assistance of outside technical experts in proposal evaluation;
7. Approve or disapprove the use of particular subcontractors;
8. Establish a short list of proposers eligible for interviews after review of written proposals;
9. Negotiate with some, all, or none of the respondents to the RFQ;
10. Solicit best and final offers from all or some of the proposers;
11. Award a contract to one or more proposers;
12. Accept an offer other than the lowest price offer; and
13. Waive informalities and irregularities in proposals and the bid process.

This RFQ does not commit Fresno COG to enter into a contract, nor does it obligate Fresno COG to pay for any costs incurred in preparation and submission of proposals or in anticipation of a contract. All submittals will be subject to public disclosure as required by the California Public Records Act.

Fresno COG reserves the right to investigate the qualifications of all firms under consideration to confirm any part of the information furnished, or to require other evidence of managerial, financial, or other capabilities which are considered necessary for the successful performance of a contract.

RFQ QUESTIONS

All questions on the RFQ should be submitted in writing by November 20, 2020, 5pm, to:

Robert Phipps, Project Manager
Fresno Council of Governments
2035 Tulare Street, Suite 201
Fresno, CA 93721
rhipps@fresnocog.org

Attachment A

TITLE VI ASSURANCE

The Council of Fresno County Governments, in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000d-4 and Title 49, Code of Federal Regulations, department of Transportation, Subtitle A, Office of the Secretary, Part 21 Nondiscrimination in Federally Assisted Programs of the Department of Transportation issued pursuant to such Act, hereby notifies all bidders that it will affirmatively insure that in any contract entered into pursuant to this advertisement, minority businesses enterprises will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, or nation origin in consideration of an award.

Attachment B

DBE/WBE BIDDERS LISTING

Name of Firm	NAICS Code	Address	Phone Number	Project Budget \$\$	DBE Status Yes/No	Age of Firm	Annual Gross Receipts

1. All contractors/subcontractors bidding on the project must provide the requested information.
2. Bidders claiming DBE status must attach a copy of a current Certification issued pursuant to 49 CFR Part 26.
3. Bidders claiming DBE status must attach written affirmation that they will participate in the project.
4. Each bidder must designate if Gross Annual Receipts are greater than or equal to \$750,000.

