



CITY OF PERRIS

REQUEST FOR PROPOSAL CONSOLIDATED PLAN (CONPLAN) ANALYSIS OF IMPEDIMENTS TO FAIR HOUSING CHOICE (AI)

Type of RFP: Professional Service

Proposal Submittals: Responses to the Request for Proposal (RFP) must be sealed and properly labeled and submitted to the following location by 5:00 pm PST:

Mail and Hand Delivery

Sara Cortés de Pavón, Principal Management Analyst
City of Perris- Economic Development & Housing Division
135 North D. Street
Perris, CA 92570

SCHEDULE OF EVENTS SUMMARY:

Demonstrate the capacity to complete the work by May 1, 2024, as follows:

RFP Issued	July 24, 2023
Deadline for Submission of Proposals	August 8, 2023
Evaluation of Submissions by	August 10, 2023
Respondents notified of outcome of evaluations of proposals	August 11, 2023
Contract taken to City Council for approval	August 29, 2023
Executed contract and AI process commences	August 30, 2023
Preliminary /Draft ConPlan & AI report due	February 1, 2024
Deliverables in hand of department and term of contract ends	May 1, 2024

(The City reserves the right to change schedule of events without prior notice or responsibility to Bidders.)

A complete copy of the RFP is available online at www.cityofperris.org under Funding/Grants or by email request to scortes-depavon@cityofperris.org

INTRODUCTION & BACKGROUND

The City of Perris (“the City”) is soliciting proposals from qualified consultant firms to produce the U.S. Department of Housing and Urban Development (“HUD”) mandated 2024-2029 Consolidated Plan (“ConPlan) and 2024-2029 Analysis of Impediments to Fair Housing Choice (“AI”) for submission to HUD. Both documents must be developed in accordance with HUD requirements and guidelines, covering a five-year period beginning with Program Year 2024 through 2029.

The Housing and Community Development Act of 1974, as amended, is the dominant statute for the Community Development Block Grant (CDBG) program. It requires that each federal grantee (the City) certify to HUD’s satisfaction that federal entitlement funds are administered according to the Fair Housing Act, which includes but is not limited to Civil Rights-related program requirements.

The ConPlan is a document that is submitted to HUD that serves as the planning document (comprehensive housing affordability strategy and community development plan) of the City and as an application for funding under the CDBG program which is prepared in accordance with the requirements of 24 CFR Part 91.

The ConPlan combines the planning and application requirements of certain Federal statutes and includes a Needs Assessment and Market Analysis outlining levels of relative need in the areas of affordable housing, homelessness, special needs, and community development. The Consultant will be expected to gather the information through a number of methods, including consultation with local agencies and elected public officials, public outreach, public meetings, public hearings, community survey, a review of demographic and economic data sets, and additional specific actions required by HUD, and a housing market analysis. The Needs Assessment portion forms the basis of the Strategic Plan that will detail how the City will address needs. The ConPlan must meet all requirements of the Federal regulations and must follow the HUD guidance for the eCon Planning Suite. This is firm deadline project, which will commence immediately after award/execution.

Additionally, as part of the ConPlan, the City certifies annually that it will affirmatively further fair housing, which means it will conduct an AI to Fair Housing Choice within the jurisdiction, take appropriate actions to overcome the effects of any impediments identified through the analysis, and maintain records reflecting that analysis and actions in this regard. The purpose of the Analysis of Impediments to Fair Housing Choice (AI) is to:

- Serve as the substantive, logical basis of Fair Housing Planning;
- Provide essential and detailed information to policy makers, administrative staff, housing providers, lenders, and fair housing advocates.

The Analysis of Impediments to Fair Housing Choice (AI) involves at least the following basic components:

- Methodology (quantitative and qualitative data sources from the public and private sector).
- Analysis of data sources. Data sources would include surveys, testing, self-assessments, studies, and existing databases (such as HMDA) identified in the methodology.
- Identification of impediments identified in the analysis.
- Actions to address past and new impediments. These actions must contain goals and timetables.
- An assessment of conditions, both public and private, affecting fair housing choice; and
- An assessment of the availability of affordable, accessible housing in a range of unit sizes

The City’s previous ConPlan and AI were conducted in 2009, 2014, and most recently in 2019. A copy of the City’s 2019-2024 ConPlan and AI is available on the City’s website <https://www.cityofperris.org/departments/funding-grants/community-development-block-grant-cdbg>.

PROPOSAL SUBMISSION INSTRUCTIONS

Proposals must be submitted in a sealed package, clearly marked with “**2024-2029 Consolidated Plan & Analysis of Impediments to Fair Housing Choice**”. Any proposals received after the due date and time specified in this RFP will not be accepted. Please submit one (1) original of the proposal, with original signatures, and three (3) copies of the proposal.

Proposals submitted by telephone, e-mail, or faxed will be rejected. Rejected proposals will not be returned and will be destroyed by the City 30 days after proposal opening. In the event that only one response is received, the City reserves the right to cancel the proposal, return the unopened response to the Vendor, and re-advertise.

Proposals must be received in the Economic Development & Housing Division in accordance with the published “Schedule of Events” and delivered to the following location by 5:00 pm PST:

Mail and Hand Delivery
Sara Cortes de Pavon, Principal Managent Analyst
City of Perris- Economic Development Department & Housing Division
135 North D. Street
Perris, CA 92570

Proposals will not be publicly opened. Bidders must carefully examine this RFP and any addenda that may be posted on the City’s website prior to submission of their proposal. Bidders must seek clarification of any ambiguity, conflict, omission or other error in this RFP in writing prior to submission of their proposal. If an answer materially affects the RFP, the information will be

incorporated into an addendum and distributed to all vendors via the City’s website; no other contact shall be made by the City to vendors regarding addenda to the RFP. It shall be the vendor’s sole responsibility to check the City’s website to determine if any addenda have been posted prior to the proposal due date.

Questions about the scope of work shall be addressed to Sara Cortés de Pavón, Economic Development & Housing Division at (951) 943-5003 ext. 254 or scortes-depavon@cityofperris.org.

SCOPE OF SERVICES

The Consultant selected will prepare the ConPlan and AI pursuant to all current federal laws, regulations, and guidelines and must be fully compliant with the requirements of the Housing and Community Development Act of 1974, as amended, and the National Affordable Housing Act of 1990, as amended. The Consultant selected will be responsible for developing and preparing the ConPlan in draft form as well as final form and submitting the final form electronically to HUD in the eCon Planning Suite after City review and authorization. The Consultant will be responsible for making any revisions required by HUD after submission. Consultant will be responsible for troubleshooting with HUD relative to using IDIS/eCon Planning Suite software. Consultant will be responsible for preparing maps, tables, charts, illustrations, and photographs to include in the Plan. The draft and final ConPlan must also be in a Word Document that is easily readable by the public as it is understood that the eCon Planning Suite version, while meeting HUD submission requirements, is not the best document to display or print for public review.

All deliverables become property of the City. The Consultant will provide a resource binder to include, at minimum, a list of data sources, cope of data collected, consultations, records, and any other supporting documentation used to develop the ConPlan and AI. The Consultant will assist staff in responding to HUD questions or issues throughout the HUD approval process.

The Consultant selected will be responsible for developing and preparing the AI in draft and final form following HUD requirements. Consultant will submit the final form to the City for submission to HUD.

CONSOLIDATED PLAN

The required ConPlan must follow any and all amendments and updates, such as utilizing the HUD’s Office of Community Planning and Development (CPD) eCon Planning Suite, including the Consolidated Plan template in IDIS Online and the CPD Maps website. The eCon Planning Suite is designed to support grantees and the public to assess their needs and make strategic investment decisions by providing better data and tools and by creating a seamless planning and grants management framework. Overview information is available at <https://www.hudexchange.info/programs/consolidated-plan/>.

The ConPlan includes six required components:

- (a) Housing and homeless needs assessment;
- (b) Housing market analysis;

- (c) Strategies and priority needs and objectives;
- (d) Action Plan (this section will be completed by City staff);
- (e) Certifications; and
- (f) Monitoring.

The ConPlan contains a single five-year plan that brings needs and resources together in a coordinated housing and community development strategy. The five-year housing and community development strategic plan also outlines the strategy to be followed and the actions to be taken to address imbalances between the City’s housing and community development needs and its identified resources.

The Consultant selected will review and tabulate data and information supplied by the City, HUD, the U.S. Census Bureau, sub-grantees, and input from citizens to complete the required ConPlan components per the HUD regulations.

ANALYSIS OF IMPEDIMENTS TO FAIR HOUSING

The AI must focus on issues related to equal opportunity and affirmatively further fair housing under the Federal Fair Housing Act and other Civil Rights-Related Program Requirements. Consultants are asked to describe the tasks required to successfully carry out the Scope of Work listed below. Consultants may include additional services that the Consultant is capable of providing and which, in the Consultant’s opinion, would enhance the implementation of the Scope of Work.

In preparing the AI, the following tasks are expected to be completed as part of the Scope of Work, and at minimum, include the following:

Jurisdiction Name:

Date:

1. Introduction and Executive Summary of the Analysis
2. Jurisdiction Background Data
3. The Consultant will collaborate with the City’s Planning & Economic Development Department in the identification, development, scheduling, and implementation of activities designed to complete a HUD acceptable Analysis of Impediments to Fair Housing Choice (AI).
4. The Consultants shall use current rules and guidelines in preparing the AI. This includes the following elements:
 - 4.1. An examination of pertinent data including demographic, income, employment, and housing data as well as studies that have been conducted that relate to fair housing.
 - 4.2. A review of prior and current activities that promote fair housing, including an assessment of agencies currently providing fair housing programs in the area.

- 4.3. An examination of fair market issues that relate to the sale or rental of housing, the provision of brokerage services, mortgage lending, insurance sales and underwriting, property appraisal and property management.
 - 4.4. An evaluation of public and Private Sector policies and practices which affect the provision of fair housing.
 - 4.5. Identification of impediments to fair housing based on the above work in priority order with recommendations to address identified elements.
 - 4.6. Identification of impediments to equal access to Housing in HUD programs regardless of sexual orientation or gender identity.
5. The Consultant shall pursue all reasonable leads to identify and analyze private and public sector practices, policies and laws that create barriers to fair housing choice. These include, but should not be limited, to the following information and analysis on the effect of the following specific areas:
- 5.1. Building, occupancy, health and safety codes on housing choice and the use of accessibility standards in local construction;
 - 5.2. Applicable zoning and land use laws and policies that place restrictions on group homes and or mobile home parks;
 - 5.3. Policies concerning the applicable of local neighborhood or site standards on new construction;
 - 5.4. Policies and practices that affect the equal provision of government services;
 - 5.5. Policies concerning activities that cause displacement that may affect opportunities to select housing inside and outside areas of minority concentration, or housing that is accessible;
 - 5.6. Policies and practices that affect the representation of minorities and the disabled on planning and/or zoning boards and commissions;
 - 5.7. Policies and practices of housing assistance providers with respect to tenant selection, assignment, reasonable accommodation, Limited English Proficiency (LEP) , delivery of services, maintenance and accessibility.
 - 5.8. Given the high rate of foreclosures within the City, provide extensive and in-depth statistical analysis that identifies potential areas of concerns, impediments, or patterns in the following areas: lending and insurance practices, improper or predatory lending practices, and infringement on fair housing choice and/or civil rights. The selected contractor will utilize existing data available from HUD and other Federal agency

databases and studies, State and local information sources, private industry reports, studies, and surveys conducted by the City.

6. Keep documentation of information gathered for the AI, methodology used, a list of individuals and groups participating in the development of the AI, and a record of outreach consultation/input activities conducted, and comments received.

SCHEDULE

Demonstrate the capacity to complete the work within 180 days of contract execution, as follows:

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SOURCE OF FUNDS & FUNDS AVAILABLE AND BUDGET

Funding is provided by the City’s Community Development Block Grant (CDBG) Program, issued by the U.S. Department of Housing and Urban Development (HUD).

COMPLIANCE AND REPORTING REQUIREMENTS

The Consultant must possess knowledge of multiple Federal Acts and Policies that may apply or have impact on pending and or future of Fair Housing and Civil Rights-Related Program Requirements. The consultant further agrees to furnish information to the City, as requested, on a timely basis to ensure HUD of compliance with pertinent provisions.

ADDITIONAL CONDITIONS

All materials submitted in response to this RFP become the property of the City and will be returned only at the option of the City. The City reserved the right to use any or all ideas presented in any response to the RFP, and selection or rejection of the proposal does not affect this right.

SERVICE PROVIDER’S COST TO DEVELOP PROPOSAL

Costs for developing proposals in response to this request RFP are entirely the obligation of the service provider and shall not be chargeable in any manner to the City of Pomona.

INSURANCE

The contractor shall furnish the City certificates of insurance prior to the execution of the contract demonstrating that the following coverage is in effect and in accordance with specifications.

1. **Worker’s Compensation**

The Contractor shall provide and maintain Workers Compensation insurance on a state-approved policy from providing statutory benefits as required by law with employer’s liability limits no less than \$1,000,000 per accident for all covered losses.

2. **Commercial General Liability**

The Contractor shall maintain during the life of any contract entered a policy of commercial general liability insurance using Insurance Services Office “Commercial General Liability” policy form CG 00 01, with an edition date prior to 2004, or the exact equivalent. Coverage for an additional insured shall not be limited to its vicarious liability. Defense costs must be paid in addition to limit. Limits shall be no less than \$1,000,000.00 per occurrence for all covered losses and no less than \$2,000,000.00 general aggregate.

3. **Automotive Insurance**

The consultant shall maintain during the life of the contracted entered a policy of comprehensive automobile liability insurance written on a per occurrences basis in an amount not less than \$1,000,000.00 per accident, combined single limit. Said policy shall include coverage for owned, non-owned, leased and hired cars.

4. **Professional Liability or Error and Omissions Insurance**

The Contractor shall maintain during the life of the contract entered a policy of insurance in an amount no less than \$1,000,000.00 per claim with respect to loss arising from the actions of the Consultant performing professional services hereunder on behalf of the City.

LETTERS OF OBJECTION

Any offeror believing that any part of the RFP, including the specifications and/or the evaluation procedures, is discriminatory against the offeror or precludes the offeror from being given reasonable consideration in the evaluation process must submit a letter five (5) days prior to the scheduled opening date specified in the cover letter, to the Grants Manager clearly stating the specific objection and the areas of concern to the offeror and including a proposed method for resolution of such objections.

Offerors are cautioned that any such objections not raised in the manner specified herein shall not be considered. The City, upon timely receipt of any such letter of objection, shall consider the offeror’s objection and, when in the opinion of the City, a modification of the RFP shall serve the best interest of the City; revisions to the RFP, in the form of a written addendum shall be issued to all offerors.

MINORITY AND WOMEN OWNED BUSINESSES

The City of Perris is committed to fostering a diverse vendor/supplier program. Minority (MBE) and Women (WBE) owned Businesses and Small Businesses are encouraged to participate in

the City's competitive process. Please indicate in your proposal if your company is a MBE, WBE, or Small Business.

CONTRACT PERIOD

The agreement for services shall be for a period of seven months, commencing from the date of Council award. The contract will have one (1), 3 month extension option for a maximum contract term of one year.

CONTRACT EXTENSION

In the event that the City exercises its option to extend the Agreement, the City shall provide written notice to the Consultant no later than thirty (30 days) before the end of the initial term. The City's decision to exercise its option will be based upon Consultants past performance being satisfactory to the City of Perris. The contractor's performance will be formally reviewed on an annual basis.

REQUIRED PROPOSAL FORMAT

In order to maintain uniformity with all proposals submitted, the Proposal must include sections that include the following information. Proposal content, completeness, clarity and conciseness are essential and will be considered when evaluating the RFP response. Submittal requirements include:

1. Cover Letter, signed by the person authorized to bind the company into any contract or agreement;
2. Complete legal name, address, telephone number, e-mail address,
3. DUNS number, and Tax Identification Number.
4. Description of the approach and methodology that the Consultant will employ in carrying out the work described in the Scope of Services;
5. Description of the participation expected from the Planning & Economic Development Department and other City departments;
6. Description of the Consultant's background, qualifications and experience, the background and qualification of the staff to be assigned to the project, and the number of years in the business of fair housing and fair housing analysis;
7. Resume of Consultant and each key staff person that will be assigned to this project.
8. Provide a list of at least three (3) public agencies, including the company name, address, contact person's name and phone number, for which similar or relevant work products have been completed and ultimately approved by HUD with the last four (4) years;
9. Provide a sample copy of your past work for a Consolidated Plan and AI;
10. Work Plan, including itemized timeline projecting key project benchmarks, individual responsibilities, and work products.
11. Fixed Price Budget. Include a fixed price or fee for the production of the requested documents. The proposal should separate the costs for the ConPlan and AI. Contract payments will be made in accordance with a completion schedule based upon completion of document elements.

All costs incurred with connection with the preparation and submission of a response proposal to this RFP and participation in this procurement shall be borne solely by the Consultant. The City, shall not, under any circumstances, be responsible for or defray any such costs incurred by the Consultant.

SELECTION CRITERIA

Proposals shall be evaluated and ranked according to the following criteria:

Criteria	Points
1. Demonstrated knowledge and experience of Consultant and Consultant’s key staff assigned to project in conducting research, data analysis and report preparation of similar work items as described in the Scope of Work Statement.	10
2. Demonstrate familiarity of Consultant/Consultant’s key staff of fair housing laws and regulations and fair housing-related issues.	10
3. Demonstrated knowledge and experience of Consultant/Consultant’s key staff assigned to project in methods for obtaining participation by diverse individuals and groups in development of similar work items as described in Scope of Work Statement.	10
4. Consultant’s past experience in successfully completing Consolidated Plans and Analyses of Impediments to Fair Housing Choice and similar work items as described in Scope of Work Statement in terms of quality of work, cost control, and compliance with performance schedules.	20
5. Consultant has proposed approach, methodology, tasks, and Plan of work to carry out the Scope of Work.	20
6. Consultant’s budgetary to carry out Scope of Work	20
7. Consultant’s capacity to complete work within the expressed timeframe	10

Maximum Score: 100

The City reserves the right to obtain clarification of any point in proposals or to obtain additional information necessary to evaluate a particular proposal or determine the Proposer’s capacity to receive a Federal Award. This includes but is not limited to a search under the federal System for Award Management (SAM.gov), and other etcetera.

An interview with some or all the respondents may be requested.

RESERVATION OF RIGHTS

The CITY reserves the right to:

- Reject any and all proposals at its discretion
- Cancel the entire RFP
- Waive any minor errors or informalities in any proposals, to the extent permitted by law
- Conduct oral interviews
- Negotiate with one or more offerors
- Require a best and final offer from one or more offerors
- Issue an amended RFP to ensure compatibility of the Proposal for comparison

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