

Request for Proposals

ANALYSIS OF IMPEDIMENTS (AI) TO FAIR HOUSING CHOICE Consulting Services



**Proposals DUE: October 1, 2014, 3:00 PM
1225 Lady Street, Suite 102**

City of Columbia
Community Development Department
Deborah J. Livingston, Director

REQUEST FOR PROPOSALS

1. **Rules** This RFP is solicited to the General Public and a Professional Services Contract will be awarded pursuant to the rules set forth. The City of Columbia reserves the right to refuse all offers.
2. **Reviewing Period** All proposals meeting RFP requirements and conditions may be held by the City of Columbia for a period not to exceed thirty (30) days from the date of the opening of proposals for the purpose of reviewing the proposals and investigating the qualifications of consultants, prior to the awarding of the contract.
3. **Compliance with Applicable Laws** The contract shall be governed by and construed in accordance with the laws of the State of South Carolina. The proposal must comply with all Federal, State, and municipal laws, ordinances, rules and/or regulations.
4. **Questions and Interpretations** Any substantive questions regarding the proposal documents shall be referred to the City of Columbia Community Development Department Attention: Dollie Bristow in writing at least five working days prior to the date and time for receipt of proposals. All answers and interpretations and any changes to the documents will be issued in the form of addenda to all consultants of record, and will be posted on the City web site.
5. **Ability and Experience** The City of Columbia will not award a contract to any consultant who cannot furnish satisfactory evidence of their ability and experience to perform the requested services. The City of Columbia may make such investigations as it deems necessary to determine the above and a consultant shall furnish information requested in this regard.
6. **Certification of Non-Collusion** All consultants must sign the attached certificate of non-collusion. This signed form must be submitted with the proposal package. Failure to sign and submit the form is cause for that proposal to be rejected.
7. **Corrections** Erasures or other changes in the proposal must be explained or noted over the signature of the consultant.
8. **Conflict of Interest** The consultant agrees that to the extent that such law is applicable to the duties it is to perform hereunder, it will comply with the provisions of state and municipal laws concerning conflict of interest. The consultant covenants that it presently has no interest and shall not require any interest, direct or indirect, which would conflict in any manner or degree with the performance under the agreement. No employee of the City of Columbia and no public official who exercises any function or responsibilities in the review or approval of the undertaking or carrying out of this agreement shall participate in any

decision relating to this agreement which affects his personal interest or the interest of any corporation, partnership, or association in which he is directly or indirectly interested or have any financial interest, direct or indirect in this agreement or the proceeds thereof.

- 9. Prospective Consultant's Qualifications** The prospective consultant replying to the RFP shall be or represent a firm, company or corporation possessing experience and expertise in planning, community development and/or a related field and the professional standards thereof, to undertake and successfully complete the Scope of Services as outlined in this RFP.
- 10. Signature** All proposals shall be complete, factual, and signed by an authorized officer of the consultant's company on the appropriate page(s).
- 11. Waiver** The City of Columbia reserves the right to reject any and all proposals, or to waive any formalities in the proposal process, if deemed in the City's best interest.
- 12. Number of Copies** The proposer shall provide one original and three (3) copies of proposal to the City of Columbia Community Development Department. The envelope shall be marked "SEALED PROPOSAL" Consolidated Plan Consulting Services.
- 13. Place and Time** Sealed proposals will be received at the City of Columbia Community Development Department, 1225 Lady Street, Suite 102, Columbia, SC 29201 until 3:00 PM, Wednesday, October 1, 2014 at which time and place they will be opened and recorded.
- 14. Modifications** A consultant may correct, modify, or withdraw a proposal by sealed, written notice clearly marked as a correction, modification, or withdrawal and received at the Columbia Community Development Department prior to the time and date set for the proposal deadline.

Failure to comply with the above conditions and requirements or any attached specifications or any other minimum qualifications will be justification to reject any proposal as incomplete.

INTRODUCTION

It is the intent of the City of Columbia to contract with a professional consulting firm with proven expertise and understanding of the U.S. Department of Housing and Urban Development (HUD) Community Development Block Grant (CDBG) program to update the Analysis of Impediments (AI) to Fair Housing Choice for the city in order to meet all regulatory requirements of the U.S. Department of Housing and Urban Development (HUD). The analysis area is defined as the entire incorporated city limits.

CONTRACT TERMS AND CONDITIONS

Proposal Preparation

The prospective consultant is to follow the instructions and requirements of the proposal submission requirements in preparing and submitting their response to the RFP.

Cost Liability

The City of Columbia assumes no responsibility and no liability for costs incurred relevant to the RFP by prospective consultants prior to issuance of a contract.

Selection of Proposals

The City of Columbia shall award a professional consulting contract to the responsible prospective consultant whose proposal conforms to the RFP, is the most advantageous to the City of Columbia, and meets the requirements as stated in the proposal submission requirements.

The selected consultant will be required to sign a contract with the City of Columbia in which s/he accepts responsibility for the performance of services as stated in the submitted proposal and be prepared to commence work immediately upon execution of the signed contract and receipt of a Notice to Proceed.

Acceptance of Proposal Content

The contents of the proposal of the successful consultant, in its entirety, shall form the base of any contract that is awarded.

Successful Consultant Responsibilities

The successful consultant will be required to assume sole responsibility for the complete project as required by this RFP. The City of Columbia will consider the successful consultant to be the sole point of contact with regard to contractual matters, whether or not subcontractors are used by the successful consultant for one or more parts of this project. The successful consultant will be responsible for representing the City in any discussions with HUD regarding the Analysis of Impediments (AI) to Fair Housing Choice Consolidated Plan that is to be prepared

Subcontracting

Subcontracting will be allowed for tasks required by this RFP. Any intent to subcontract on the part of the prospective consultant must be specifically described in the proposal. The City of Columbia reserves the right to approve the use of all subcontractors.

Ownership of Material

All rights, titles to and ownership of all data, material, and documentation resulting from this project and/or prepared for the City pursuant to this contract shall remain exclusively with the City. The prospective consultant shall be paid for all service as will be specified in the contract.

Additional Requirements

During the project's contract, the selected Consultant will attend all required meetings without additional compensation. In addition, the Consultant will meet with CDD staff at the start of the project and as necessary throughout the project to review recommendations and project status. The selected Consultant will be expected to attend any relevant HUD briefings and training without additional compensation.

Price Change

All prices shall be firm and not subject to increase during the period of this contract.

SCOPE OF WORK OVERVIEW

The analysis services shall include the following areas:

- An examination of pertinent data including demographic, income, employment and housing data, including Home Mortgage Disclosure Act (HMDA), as well as studies that have been completed that relate to fair housing.
- An extensive review of State and local jurisdiction's laws, regulations, including an assessment of agencies currently providing fair housing programs in the area; and administrative policies, procedures, and practices.
- An assessment of how those laws affect the location, availability, and accessibility of housing.
- An evaluation of conditions, both public and private, affecting fair housing choice for all protected classes.
- An identification of any impediments to fair housing in both the private and public sector because of race, color, religion, sex, disability, familial status or national origin which restrict or have the effect of restricting housing choices or availability of housing choices listed in order of priority.
- Develop an AI that includes conclusions and recommendations for action, including recommended actions to overcome identified impediments to fair housing choice, milestones, timetables and measureable results.
- The Consultant is responsible for submitting 15 copies stapled black/white copies each of the draft (AI) for staff and Citizens Advisory Committee Review.

All proposals shall include a timeline for undertaking and completing the Study from the receipt of a Notice to Proceed and contract for services. All work must be completed within five (5) months of Notice to Proceed.

EVALUATION CRITERIA

Each proposal will be reviewed to determine if the proposal is responsive to the submission requirements outlined in this Solicitation. A responsive proposal is one which follows the

requirements of this solicitation, includes all documentation, is submitted in the format outlined in this solicitation and is of timely submission. Failure to comply with these requirements may result in the proposal being deemed non-responsive. The total cost of services will be identified in the cover letter with further itemization of all costs in the response materials.

The technical evaluation will be based on the following criteria:

- Work Plan/Approach and project schedule (20 points)
- Firm's history, prior experience (15 points)
- References (10 points)
- Qualifications of the project team (10 points)
- Ability to perform required services (20 points)
- Total project cost (25 points)

FINAL WORK PRODUCTS

The Consultant is responsible for submitting 15 color copies of the final Analysis of Impediments (AI) to Fair Housing Choice in 3-ring binders and one (1) unbound and reproducible master hard copy of each document, including maps and graphics, no later than May 12, 2015.

The Consultant is also responsible for submitting one (1) copy of the final AI as a PDF. The Consultant will submit a reproducible copy of all maps, graphics, slide presentations, surveys, and photographs to the CDD. Presentation materials, such as display boards, slides, videos, etc., shall be submitted to the CDD.

All deliverables will become property of the City of Columbia.

Proposal Submission Requirements

Please note that separate non-price and price proposals are required.

The name of the proposer and title of the project, **Analysis of Impediments (AI) to Fair Housing Choice**, must appear on the outside front cover of each proposal.

Proposals shall be due to the City's Community Development Department **on or before 3:00 pm EST, Wednesday, October 1, 2014**. All proposals must be in a sealed envelope marked: REQUEST FOR PROPOSAL-Analysis of Impediments to Fair Housing Choice City of Columbia
Community Development Department
Dollie Bristow, CD Administrator
1225 Lady St., Suite 102, PO Box 147 Columbia,
SC 29217

No verbal, emailed or faxed submittals will be accepted.

The City accepts no responsibility for any postal delivery system. All late or incomplete submittals will be rejected. Proposals received after that date will be returned to sender,

unopened. The City reserves the right to select the proposal which best suits its needs whether the price is the lowest or not, and also reserves the right to reject and any and all proposals and to waive irregularities therein.

TIMETABLE

The approximate time table to select the bidder and execute the contract is as follows:

October 1, 2014: Final date for submission of RFP

October 15, 2014: Notice to Proceed

February 15, 2014: Draft Document completed

March 15, 2015: Final Document completed

GENERAL REQUIREMENTS

The successful consultant will be required to provide Professional Liability Insurance. This contractual obligation to verify work eligibility status for new employees physically performing services within the State of South Carolina also applies to any and all subcontractors utilized by the Contractor in performing this contract. The Contractor understands and agrees that lawful presence in the United States is required and the Contractor may be disqualified or the contract terminated if such lawful presence cannot be verified as required by South Carolina: S.C. Code Ann. § 39-3-170.

Please contact Dollie Bristow, City of Columbia, at 803-545-3371 with any questions regarding this RFP.

NON-PRICE PROPOSAL CONTENTS

The information submitted must include, but should not necessarily be limited to, the following items:

1. Cover Letter

A letter signed by an officer of the firm, binding the firm to all comments made in the proposal is required. Include a primary contact person for the proposal.

2. Qualifications and Experience

A description of the history, experience and qualifications of your firm and any proposed subcontractors to perform the Scope of Services. Please provide:

- A. Names and addresses of all firms involved on the project (including subcontractors);
- B. History, size and structure of firm(s)
- C. Name(s) of principals in firm(s);
- D. Identification of Principal in Charge, the Project Manager and the roles of other key personnel. Include relevant project experience and copies of resumes of all personnel assigned to project.
- E. Describe other similar projects your firm has undertaken with contact information. Please make specific reference to experience and qualifications as related to Analysis of Impediments to Fair Housing Choice, CDBG programs, moderating neighborhood meetings, experience/qualifications of assigned staff and experience/success implementing similar projects for municipalities, particularly in economically distressed communities. If the Community Involvement process will be subcontracted, please provide the same information for the subcontracting firm;
- F. Listing of contracts currently under contract;
- G. Contact information for references from similar projects

Also include one copy (or electronic link address to) of a product you worked on including Analysis of Impediments to Fair Housing Choice and/or similar reports that were completed for other jurisdictions.

3. Approach to Scope of Work

A detailed description of the approach to Scope of Services is required. The City is seeking creative, proven techniques to address the community needs and develop effective strategies for the Analysis of Impediments to Fair Housing Choice. Key issues for individualized focus include:

- Approach to the examination of pertinent data including demographic, income, employment and housing data, including Home Mortgage Disclosure Act (HMDA), as well as studies that have been completed that relate to fair housing.

- Approach to an extensive review of State and local jurisdiction’s laws, regulations, including an assessment of agencies currently providing fair housing programs in the area; and administrative policies, procedures, and practices.
- Approach to identification of any impediments to fair housing in both the private and public sector because of race, color, religion, sex, disability, familial status or national origin which restrict or have the effect of restricting housing choices or availability of housing choices listed in order of priority.
- Approach to develop an AI that includes conclusions and recommendations for action, including recommended actions to overcome identified impediments to fair housing choice, milestones, timetables and measureable results.
- Additional recommendations not identified in the scope of services.

4. Plan of Services/Timeline

The Plan of Services must include the elements to be performed by the consultant, the number of hours and other resources required to complete each task, and the expected time to complete each step. The Plan should include time schedules and milestones, personnel assignments, and other information as necessary to demonstrate the consultant’s ability to complete the project on time.

5. City Resources

A list of the resources, personnel, data, or other assistance which the proposer expects are required from the City in order to complete each task in the scope of services during the planned time period. The City will be responsible for:

- Providing the Consultant with copies of any existing handouts, reports, data and presentation information that are available.

6. References

Provide three references from individuals familiar with your work on Analysis of Impediments (AI) to Fair Housing Choice reports.

7. Form for Non – Collusion

Sign form that is part of this RFP

PRICE PROPOSAL CONTENTS

The price proposal must be in a separate sealed envelope marked as follows: Price Proposal.

1. Detailed Description of Costs

The City seeks proposals that demonstrate maximum value, innovation, effectiveness, and total work to be performed within the funding available.

2. Detailed Cost Breakdown

Provide a cost for each task identified in the Scope/Schedule and an estimate of manpower hours necessary to complete work. All cost assumptions must be clearly documented in this portion of the submittal. Include a budget for direct expenses.

3. Form for Cost Proposal

Complete and sign form that is part of this RFP.

Minimum Evaluation Criteria

In order to be reviewed, the proposal must be substantially complete, meet the Qualifications listed in the RFP and contain all necessary forms.

QUALIFICATIONS:

- Minimum of a Master's Degree in Management, Community Planning, Urban Planning, Business Administration, or a related field.

- Minimum of 5 years of experience with HUD Analysis of Impediments (AI) to Fair Housing Choice Process or similar local planning processes.

- Minimum of 5 years of experience with HUD federal programs.

Consultant Interviews

Following evaluation of the submitted materials, at dates and times to be announced, the City may request the three (3) candidate firms that score highest based on the above-listed comparative evaluation criteria to make an oral presentation to the City evaluation team. The presentation must be made by the project manager (and key support team members) to be assigned to the work. Such presentation shall, as a general rule, be limited to approximately 30 minutes for presentation plus 30 minutes of questions.

Deadline for submission: Wednesday, October 1, 2014, at 3:00PM, at the Community Development Department 1225 Lady Street, Suite 102, Columbia, SC 29201, at which time proposals will be opened and recorded.

FORM FOR COST PROPOSAL

I, _____, propose to provide the services detailed in the attached Scope of Services for the following proposal price:

\$ _____ lump sum fee.

This proposal shall remain in effect for 60 days.

Signed: _____
(Proposer)

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under the penalties of perjury that this bid or bid has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business partnership, corporation, union, committee, club or other organization, entity or group of individuals.

Signature of person submitting contract/bid

Date

Name of Business