**REQUEST FOR PROPOSALS
Municipal Housing Agency Study
Proposal Template**

**RFP LAF2024-02**

**CONTACT:** **jeremy.pollock@sfgov.org****, (415) 554-6756**

*Instructions are provided in blue and may be deleted. Please complete your response in the template provided, using as much space as needed. Indicate clearly where separate documents are provided. In order to receive the maximum amount of points, please be sure to follow this format carefully and thoroughly (but concisely) address each section. Please ensure your response meets the Minimum Qualifications so that it will be evaluated.*

**Note that all documents under this RFP process are subject to public disclosure. Please redact confidential or proprietary information as appropriate.**

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# Respondent Information

## Respondent Information and Partner(s)

|  |  |
| --- | --- |
| **Respondent’s Name or Firm’s Name** |  |
| **Respondent’s Address** |  |
| **Contact Person for Proposal** |  |
| **Phone Number** |  |
| **Email Address** |  |
| **Respondent’s City Bidder ID** | *See RFP Section 6, Registering as a City Bidder and Supplier. Indicate if you are fully compliant City Supplier.* |

# Minimum Qualifications – 25 points

The Minimum Qualifications are used by LAFCo to determine whether the Respondent meets qualifications and that the proposed staff has had experience on projects comparable to the services the LAFCo is requesting. Any response that does not demonstrate that the Respondent meets these Minimum Qualifications by the response deadline will be considered non-responsive and will not be evaluated. Be sure to complete this section, as described.

## MQ1. Prior Housing and Administrative Policy Experience

Using the following template, Respondents must submit two Prior Housing and Administrative Policy Project Descriptions, which meet the following criteria:

* + 1. The services/experiences described must be comparable to the community engagement services the LAFCo is requesting, described in RFP Section 2, Scope of Work and Section 4, Evaluation Criteria.
		2. BothPrior Project Descriptions must demonstrate successful completion within five years from the issuance date of this RFP (successful completion means project deliverables have been completed as required).

**Housing and Administrative Policy Experience DESCRIPTION 1**

|  |  |
| --- | --- |
| **Project** |  *Project Name*  |
| **Client** |  *Client Name (City, County, etc.)*  |
| **Client Unit** |  *Client Agency, Department, or Unit Name*  |
| **Timeline** | *Month/Year to Month/Year; Length of project beginning to end (Project must be within five (5) years from the date of this RFP)* |
| **Consultant Firm Name (if applicable)** |   |
| **Consultant Lead(s)** |  *Staff Lead Name(s) – should be same as lead proposed to LAFCo*  |
| **Fee** |  *$00,000.00*  |
| **Number of Hours** |  *XX hours*  |
| **Project Background** Include background information regarding the client and/or program, as applicable. What were the project goals and desired outcomes? *Insert Response Here.***Project Scope and Approach** What were the project activities your firm completed? How did you approach the project? What methodologies were used, and how did those address the project goals?*Insert Response Here.***Project Staffing** Identify each key person on the project team with titles, descriptions of responsibilities, and hourly rate, including any subcontractors. *Insert Response Here.***Project Outcomes** What, if any, measurable service deliverables or outcomes can be attributed to your services? How did you add value to the client? Examples include but are not limited to the amount of cost savings as a result of services provided, legislative or policy changes, organizational changes, or other measurable indicators of successful implementation of findings from your services. *Insert Response Here.* |

**Housing and Administrative Policy Experience DESCRIPTION 2**

|  |  |
| --- | --- |
| **Project** |  *Project Name*  |
| **Client** |  *Client Name (City, County, etc.)*  |
| **Client Unit** |  *Client Agency, Department, or Unit Name*  |
| **Timeline** | *Month/Year to Month/Year; Length of project beginning to end (Project must be within five (5) years from the date of this RFP)* |
| **Consultant Firm Name (if applicable)** |   |
| **Consultant Lead(s)** |  *Staff Lead Name(s) – same as lead proposed to LAFCo?*  |
| **Fee** |  *$00,000.00*  |
| **Number of Hours** |  *XX hours*  |
| **Project Background** Include background information regarding the client and/or program, as applicable. What were the project goals and desired outcomes? *Insert Response Here.***Project Scope and Approach** What were the project activities your firm completed? How did you approach the project? What methodologies were used, and how did those address the project goals?*Insert Response Here.***Project Staffing** Identify each key person on the project team with titles, descriptions of responsibilities, and hourly rate, including any subcontractors. *Insert Response Here.***Project Outcomes** What, if any, measurable service deliverables or outcomes can be attributed to your services? How did you add value to the client? Examples include but are not limited to the amount of cost savings as a result of services provided, legislative or policy changes, organizational changes, or other measurable indicators of successful implementation of findings from your services. *Insert Response Here.* |

## MQ2. Ability to Draft an Agency Structure

Using the following template, Respondents must submit two Prior Ability to Draft an Agency Structure Project Descriptions, which meet the following criteria:

* + 1. The services/experiences described must be comparable to the PCA services the LAFCo is requesting, described in RFP Section 2, Scope of Work and Section 4, Evaluation Criteria.
		2. BothPrior Property Conditions Assessment Descriptions must demonstrate successful completion within five years from the issuance date of this RFP (successful completion means project deliverables have been completed as required).

**Ability to Draft an Agency Structure DESCRIPTION 1**

|  |  |
| --- | --- |
| **Project** |  *Project Name*  |
| **Client** |  *Client Name (City, County, etc.)*  |
| **Client Unit** |  *Client Agency, Department, or Unit Name*  |
| **Timeline** | *Month/Year to Month/Year; Length of project beginning to end (Project must be within five (5) years from the date of this RFP)* |
| **Consultant Firm Name (if applicable)** |   |
| **Consultant Lead(s)** |  *Staff Lead Name(s) – same as lead proposed to LAFCo?*  |
| **Fee** |  *$00,000.00*  |
| **Number of Hours** |  *XX hours*  |
| **Project Background** Include background information regarding the client and/or program, as applicable. What were the project goals and desired outcomes? *Insert Response Here.***Project Scope and Approach** What were the project activities your firm completed? How did you approach the project? What methodologies were used, and how did those address the project goals?*Insert Response Here.***Project Staffing** Identify each key person on the project team with titles, descriptions of responsibilities, and hourly rate, including any subcontractors. *Insert Response Here.***Project Outcomes** What, if any, measurable service deliverables or outcomes can be attributed to your services? How did you add value to the client? Examples include but are not limited to the amount of cost savings as a result of services provided, legislative or policy changes, organizational changes, or other measurable indicators of successful implementation of findings from your services. *Insert Response Here.* |

**Ability to Draft an Agency Structure DESCRIPTION 2**

|  |  |
| --- | --- |
| **Project** |  *Project Name*  |
| **Client** |  *Client Name (City, County, etc.)*  |
| **Client Unit** |  *Client Agency, Department, or Unit Name*  |
| **Timeline** | *Month/Year to Month/Year; Length of project beginning to end (Project must be within five (5) years from the date of this RFP)* |
| **Consultant Firm Name (if applicable)** |   |
| **Consultant Lead(s)** |  *Staff Lead Name(s) – same as lead proposed to LAFCo?*  |
| **Fee** |  *$00,000.00*  |
| **Number of Hours** |  *XX hours*  |
| **Project Background** Include background information regarding the client and/or program, as applicable. What were the project goals and desired outcomes? *Insert Response Here.***Project Scope and Approach** What were the project activities your firm completed? How did you approach the project? What methodologies were used, and how did those address the project goals?*Insert Response Here.***Project Staffing** Identify each key person on the project team with titles, descriptions of responsibilities, and hourly rate, including any subcontractors. *Insert Response Here.***Project Outcomes** What, if any, measurable service deliverables or outcomes can be attributed to your services? How did you add value to the client? Examples include but are not limited to the amount of cost savings as a result of services provided, legislative or policy changes, organizational changes, or other measurable indicators of successful implementation of findings from your services. *Insert Response Here.*  |

## MQ3. Coordination and Facilitation

Using the following template, Respondents must submit two Prior Coordination and Facilitation Project Descriptions, which meet the following criteria:

1. The services/experiences described must be comparable to the PCA services the LAFCo is requesting, described in RFP Section 2, Scope of Work and Section 4, Evaluation Criteria.
2. BothPrior Property Conditions Assessment Descriptions must demonstrate successful completion within five years from the issuance date of this RFP (successful completion means project deliverables have been completed as required).

**Coordination and Facilitation DESCRIPTION 1**

|  |  |
| --- | --- |
| **Project** |  *Project Name*  |
| **Client** |  *Client Name (City, County, etc.)*  |
| **Client Unit** |  *Client Agency, Department, or Unit Name*  |
| **Timeline** | *Month/Year to Month/Year; Length of project beginning to end (Project must be within five (5) years from the date of this RFP)* |
| **Consultant Firm Name (if applicable)** |   |
| **Consultant Lead(s)** |  *Staff Lead Name(s) – same as lead proposed to LAFCo?*  |
| **Fee** |  *$00,000.00*  |
| **Number of Hours** |  *XX hours*  |
| **Project Background** Include background information regarding the client and/or program, as applicable. What were the project goals and desired outcomes? *Insert Response Here.***Project Scope and Approach** What were the project activities your firm completed? How did you approach the project? What methodologies were used, and how did those address the project goals?*Insert Response Here.***Project Staffing** Identify each key person on the project team with titles, descriptions of responsibilities, and hourly rate, including any subcontractors. *Insert Response Here.***Project Outcomes** What, if any, measurable service deliverables or outcomes can be attributed to your services? How did you add value to the client? Examples include but are not limited to the amount of cost savings as a result of services provided, legislative or policy changes, organizational changes, or other measurable indicators of successful implementation of findings from your services. *Insert Response Here.* |

**Coordination and Facilitation DESCRIPTION 2**

|  |  |
| --- | --- |
| **Project** |  *Project Name*  |
| **Client** |  *Client Name (City, County, etc.)*  |
| **Client Unit** |  *Client Agency, Department, or Unit Name*  |
| **Timeline** | *Month/Year to Month/Year; Length of project beginning to end (Project must be within five (5) years from the date of this RFP)* |
| **Consultant Firm Name (if applicable)** |   |
| **Consultant Lead(s)** |  *Staff Lead Name(s) – same as lead proposed to LAFCo?*  |
| **Fee** |  *$00,000.00*  |
| **Number of Hours** |  *XX hours*  |
| **Project Background** Include background information regarding the client and/or program, as applicable. What were the project goals and desired outcomes? *Insert Response Here.***Project Scope and Approach** What were the project activities your firm completed? How did you approach the project? What methodologies were used, and how did those address the project goals?*Insert Response Here.***Project Staffing** Identify each key person on the project team with titles, descriptions of responsibilities, and hourly rate, including any subcontractors. *Insert Response Here.***Project Outcomes** What, if any, measurable service deliverables or outcomes can be attributed to your services? How did you add value to the client? Examples include but are not limited to the amount of cost savings as a result of services provided, legislative or policy changes, organizational changes, or other measurable indicators of successful implementation of findings from your services. *Insert Response Here.*  |

## MQ4. Community Engagement

Using the following template, Respondents must submit two Prior Community Engagement Project Descriptions, which meet the following criteria:

1. The services/experiences described must be comparable to the PCA services the LAFCo is requesting, described in RFP Section 2, Scope of Work and Section 4, Evaluation Criteria.
2. BothPrior Property Conditions Assessment Descriptions must demonstrate successful completion within five years from the issuance date of this RFP (successful completion means project deliverables have been completed as required).

**Community Engagement DESCRIPTION 1**

|  |  |
| --- | --- |
| **Project** |  *Project Name*  |
| **Client** |  *Client Name (City, County, etc.)*  |
| **Client Unit** |  *Client Agency, Department, or Unit Name*  |
| **Timeline** | *Month/Year to Month/Year; Length of project beginning to end (Project must be within five (5) years from the date of this RFP)* |
| **Consultant Firm Name (if applicable)** |   |
| **Consultant Lead(s)** |  *Staff Lead Name(s) – same as lead proposed to LAFCo?*  |
| **Fee** |  *$00,000.00*  |
| **Number of Hours** |  *XX hours*  |
| **Project Background** Include background information regarding the client and/or program, as applicable. What were the project goals and desired outcomes? *Insert Response Here.***Project Scope and Approach** What were the project activities your firm completed? How did you approach the project? What methodologies were used, and how did those address the project goals?*Insert Response Here.***Project Staffing** Identify each key person on the project team with titles, descriptions of responsibilities, and hourly rate, including any subcontractors. *Insert Response Here.***Project Outcomes** What, if any, measurable service deliverables or outcomes can be attributed to your services? How did you add value to the client? Examples include but are not limited to the amount of cost savings as a result of services provided, legislative or policy changes, organizational changes, or other measurable indicators of successful implementation of findings from your services. *Insert Response Here.* |

**Community Engagement DESCRIPTION 2**

|  |  |
| --- | --- |
| **Project** |  *Project Name*  |
| **Client** |  *Client Name (City, County, etc.)*  |
| **Client Unit** |  *Client Agency, Department, or Unit Name*  |
| **Timeline** | *Month/Year to Month/Year; Length of project beginning to end (Project must be within five (5) years from the date of this RFP)* |
| **Consultant Firm Name (if applicable)** |   |
| **Consultant Lead(s)** |  *Staff Lead Name(s) – same as lead proposed to LAFCo?*  |
| **Fee** |  *$00,000.00*  |
| **Number of Hours** |  *XX hours*  |
| **Project Background** Include background information regarding the client and/or program, as applicable. What were the project goals and desired outcomes? *Insert Response Here.***Project Scope and Approach** What were the project activities your firm completed? How did you approach the project? What methodologies were used, and how did those address the project goals?*Insert Response Here.***Project Staffing** Identify each key person on the project team with titles, descriptions of responsibilities, and hourly rate, including any subcontractors. *Insert Response Here.***Project Outcomes** What, if any, measurable service deliverables or outcomes can be attributed to your services? How did you add value to the client? Examples include but are not limited to the amount of cost savings as a result of services provided, legislative or policy changes, organizational changes, or other measurable indicators of successful implementation of findings from your services. *Insert Response Here.*  |

## MQ5. Staffing Confirmation

MQ6.1: The lead staff proposed to be assigned to the Municipal Housing project must individually have had a similar lead role in both Prior Project Descriptions submitted for Minimum Qualification MQ1.

* + **Yes**

**Notes:**

MQ6.2: The lead staff proposed to be assigned to the Municipal Housing project must individually have had a similar lead role in both Prior Project Descriptions submitted for Minimum Qualification MQ2.

* + **Yes**

**Notes:**

MQ6.3: The lead staff proposed to be assigned to the Municipal Housing project must individually have had a similar lead role in both Prior Project Descriptions submitted for Minimum Qualification MQ3.

* + **Yes**

**Notes:**

MQ6.4: The lead staff proposed to be assigned to the Municipal Housing project must individually have had a similar lead role in both Prior Project Descriptions submitted for Minimum Qualification MQ4.

* + **Yes**

**Notes:**

# Firm and Staff Qualifications – 25 points

Even if using an alternative format for your responses, the following information must be included in the order specified to be scored appropriately.

## Pending Litigation

Briefly describe any litigation or pending litigation related to your provision of professional services within the past five years of this RFP issue date. If none, state “None.”

*Insert Response Here.*

## Client Relationships Severed for Reasons Other Than Convenience

Provide a list of your clients where the contractual relationship was not completed and was severed for reasons other than convenience. A brief description of why the relationship was severed and the name of the client and the client’s project manager are also required. If none, state “None.”

*Insert Response Here.*

## Proposed Staffing Structure

Describe the staffing structure proposed for services under this RFP, including a proposed staff organization chart, if applicable. If respondent represents an individual and not a firm, please specify here.

For each staff member, including subcontractors, use the following tables (or alternative format) to provide information on the proposed roles and responsibilities, qualifications, and educational background.

*Insert Response Here.*

|  |  |
| --- | --- |
| **Name, Title** | *Insert Response Here.* |
| **Proposed Project Role and Responsibilities** | *Insert Response Here.* |
| **Experience with Scope of Services** | Describe relevant experience for facilitating community engagement processes and/or property conditions assessments. *Insert Response Here. If not applicable, write “Not Applicable.”* |

|  |  |
| --- | --- |
| **Education** | ***Insert other licenses, qualifications or educational background narrative here, or indicate if resumes or CVs are attached.*** |

# Approach and Price – 50 points

## Proposed Work Plan for Phase 1-A: Report and Focus Groups

Describe your approach to designing and conducting the Municipal Housing Study, as described in RFP Section 2.1, Scope of Work. Include how this process will incorporate Phase 1-B: Working Group, and how you will prepare the final report.

*Insert Response Here.*

## Proposed Work Plan for Phase 1-B: Working Group

Describe your approach to designing and conducting the Municipal Housing Study, as described in RFP Section 2.1, Scope of Work. Include how this process will incorporate Phase 1-A: Report and Focus Groups, and how you will prepare the final report.

*Insert Response Here.*

## Client Involvement or Level of Effort

Describe your expectations of the involvement and level of effort required by LAFCo staff and any City, state, or federal agencies. This could include information requests, facility access, review, approval, and other communication protocols necessary to successfully complete the services.

*Insert Response Here.*

## Desired Qualifications and Competitive Differences

What makes your approach to the services different or more effective than others providing the same services? Describe your experience and ability to meet the Desired Qualifications listed in RFP Section 4.3.

*Insert Response Here.*

## Price Proposal

Submit a pricing narrative that addresses:

* Hourly rates for all team members assigned to this work.
* Any fees or expenses other than hourly rates your firm will charge.
* Whether the proposer will bill based on hourly rates or a fixed not-to-exceed amount.

Please note that the total anticipated not-to-exceed project budget is to be $200,000. However, the evaluation panel will score proposals on their fiscal responsibility and the actual contract budget will vary, depending upon service and project needs at the LAFCo’s sole and absolute discretion, and funding availability. Proposals that exceed the anticipated not-to-exceed project budget of $200,000 will not be considered.

*Insert Response Here or Attachment.*

# References

Respondents must submit at least three references of prior clients.

* At least one reference must be for community engagement services and
* at least one reference must be for housing and administrative policy experience and/or prior experience drafting an agency structure services, and
* at least one reference must be for event planning and hosting.

The LAFCo will not inform Respondents when references will be contacted. The Respondent should ensure that client contact information listed in the response is up-to-date and should notify references that the LAFCo may be contacting them.

**Reference #1**

|  |  |
| --- | --- |
| **Project** |  *Project Name*  |
| **Client** |  *Client Name (City, County, etc.)*  |
| **Reference Name and****Title**   |
| **Reference Phone** |   |
| **Reference E-mail** |   |

**Reference #2**

|  |  |
| --- | --- |
| **Project** |  *Project Name*  |
| **Client** |  *Client Name (City, County, etc.)*  |
| **Reference Name and****Title**   |
| **Reference Phone** |   |
| **Reference E-mail** |   |

**Reference #3**

|  |  |
| --- | --- |
| **Project** |  *Project Name*  |
| **Client** |  *Client Name (City, County, etc.)*  |
| **Reference Name and****Title**   |
| **Reference Phone** |   |
| **Reference E-mail** |   |