



REVISED AND REISSUED
REQUEST FOR PROPOSALS FOR
Municipal Housing Viability Study
Solicitation #LAF2024-02
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Background

The San Francisco Local Agency Formation Commission (LAFCo) seeks proposals to conduct a study to determine the viability and recommended structure of a Municipal Housing agency pilot.

For the purposes of this study, “Municipal Housing” is housing owned and operated by the City that is permanently affordable and serves all income qualified households with a maximum average of not more than 80% of median income across all units in a project.

The study will have two primary goals: first, define and outline a structure for a pilot phase of a Municipal Housing enterprise agency to create and manage cross-subsidy, mixed income, City-owned housing. This study will include the number of full-time equivalent positions per subdivision and the total departmental cost estimate; and second, provide recommendations on centering tenant perspectives in execution and structure of department, especially low-income tenants.

The outcomes of this study, and the final deliverable, will be a report used to inform budget recommendations for implementation of November 2020’s Proposition K, which authorized the City to own, develop, construct, acquire or rehabilitate up to 10,000 units of low-income rental housing and potentially inform the actions of the Housing Stability Fund Oversight Board.

Additional deliverables include, convening and staffing a working group of local housing experts with the goal of soliciting feedback and input for the final report.

Schedule*

- April 22, 2024: RFP Issued
- May 6, 2024 at 5PM: Deadline for Questions
- May 22, 2024 at 5PM: Deadline for Proposals

Anticipated Contract Term

The anticipated contract term resulting from this RFP may last up to one year. Actual contract terms may vary, depending upon service and project needs at the LAFCo’s sole, absolute discretion. Respondent selected for the resulting contract must be available to commence work on or before June 1, 2024.

Anticipated Contract Budget

For the contract resulting from this RFP, 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.

Important City Supplier and Bidder Resources

Bidders must fulfill the City’s administrative requirements for doing business with the City and become an approved City supplier prior to contract award. Bidders who are not currently approved City suppliers are strongly encouraged to begin this process immediately and contact the support resources with any questions.

City Supplier and Bidder Portal:

<https://sfcitypartner.sfgov.org>

Bid Opportunities:

<https://sfcitypartner.sfgov.org/pages/Events-BS3/event-search.aspx>

Frequently Asked Questions:

<https://sfcitypartner.sfgov.org/pages/faq.aspx>

User Support:

<https://sfcitypartner.sfgov.org/pages/contact.aspx>

User Support tel. (415) 944-2442

Submission of Proposals Requirements

Proposals and all related materials must be received by the Deadline for Proposals. Proposals must be emailed to jeremy.pollock@sfgov.org.

Substantial Revisions to the Reissued RFP
(Major Differences between Solicitation #LAF2024-02 and Solicitation #LAF2024-01)

1. A not-to-exceed of \$200,000 has been added. Proposers are required to provide a budget, which will factor into the proposal's scoring.
 - a. (RFP, page 1) Anticipated Contract Budget: For the contract resulting from this RFP, 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.
2. The symposium component has been removed. The previous RFP included both a study on a Municipal Housing Agency and a subsequent symposium on that same study. The revised and reissued RFP does not include a request for a symposium.
3. Additional language has been added to provide clarity on public disclosure limitations of confidential information.
 - a. (RFP, page 16, Section 5.3) Public Disclosure:
 - i. All documents under this solicitation process are subject to public disclosure per the California Public Records Act (California Government Code Section §6250 et. Seq) and the San Francisco Sunshine Ordinance (San Francisco Administrative Code Chapter 67). Contracts, Proposals, responses, and all other records of communications between the City and Proposers shall be open to inspection immediately after a contract has been awarded. Nothing in this Administrative Code provision requires the disclosure of a private person's or organization's net worth or other proprietary financial data submitted for qualification for a contract or other benefit until and unless that person or organization is awarded the contract or benefit.
 - ii. If the City receives a Public Records Request ("Request") pertaining to this solicitation, City will use its best efforts to notify the affected Proposer(s) of the Request and to provide the Proposer with a description of the material that the City deems responsive and the due date for disclosure ("Response Date"). If the Proposer asserts that some or all of the material requested contains or reveals valuable trade secret or other information belonging to the Proposer that is exempt from disclosure and directs the City in writing to withhold such material from production ("Withholding Directive"), then the City will comply with the Withholding Directive on the condition that the Proposer seeks judicial relief on or before the Response Date. Should Proposer fail to seek judicial relief on or before the Response Date, the City shall proceed with the disclosure of responsive documents.

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1. Introduction

1.1 General Terms Used in this Request for Proposals (RFP)

Terms and abbreviations used throughout this RFP include:

- **Affordable Housing** – Refers to a broad range of housing types, typically not owned by the City, with a rent or cost of ownership limited to 30 percent or less of the household’s income and/or housing that is funded by the government. See San Francisco’s FY 2022-2031 Capital Plan for more details.
- **City** – The City and County of San Francisco
- **Contract Monitoring Division (CMD)** – San Francisco Contract Monitoring Division, a department of the City and County of San Francisco.
- **Firm** – Any business entity including, but not limited to, companies, nonprofit organizations, educational institutions, and individuals.
- **Housing Stability Fund** – A fund created by San Francisco ordinance #233-20 for the acquisition, creation, operation, development, construction, or rehabilitation of Social Housing Developments.
- **Housing Stability Fund Oversight Board (HSFOB)** – An advisory board created by ordinance #233-20 that makes recommendations and provides guidance for the use of the Housing Stability Program Fund for Social Housing Developments.
- **LAFCo** – The San Francisco Local Agency Formation Commission
- **Mayor’s Office of Housing and Community Development (MOHCD)** – A department of the City and County of San Francisco that creates and manages affordable housing policies and programs.
- **Municipal Housing** – Social Housing that is owned, operated, and financed by the government, in this case the City and County of San Francisco.
- **November 2020 Proposition K** – An initiative ordinance that authorized the City to “own, develop, construct, acquire, and/or rehabilitate up to 10,000 residential units of low-rent housing projects within the City for the purpose of providing affordable rental housing.” This voter authorization was required by Article 34 of the California Constitution.
- **Public Housing** – Housing that is owned and/or managed by the government for the purpose of providing housing to low-income families; and falls under the oversight of the U.S. Department of Housing and Urban Development (HUD) and under the authority of Housing Authority of the City and County of San Francisco.
- **Respondent/Proposer** – Any entity submitting a response to this RFP
- **Response/Proposal** – A Respondent’s proposal submitted in response to this RFP
- **Social Housing** – Defined by San Francisco Administrative Code Section 10.100-78(e) as housing developments that meet the following two criteria:
 - (1) the City, a nonprofit, residents, or a residents association under binding regulatory agreement ensuring permanent affordability, retains an ownership interest in the land, improvements, or both, or has permanent loan and regulatory agreements for the property, and
 - (2) the Social Housing Development serves all income qualified households with a maximum average of not more than 80% of median income across all units in a project, based on the median income within the zip code area where the project is located, as determined and updated annually and published by MOHCD and affordable to such households applicable to a unit. Social Housing Developments

shall include, but not be limited to, community land trusts, limited equity cooperative housing, nonprofit housing corporation housing, and municipal housing. MOHCD shall establish minimum regulatory requirements for all Social Housing Developments, including but not limited to, enforceable income and affordability restrictions for the useful life of the property but no less than 99 years through a recorded restriction or ground lease from MOHCD.

1.2 Statement of Need and Intent

What Does the LAFCo Seek?

The San Francisco Local Agency Formation Commission seeks proposals to conduct a study to determine the viability and recommended structure of a Municipal Housing agency pilot.

For the purposes of this study, “Affordable Housing” includes a wide range of types of housing that is either funded by the government or where rent or cost of ownership is restricted. “Social Housing” is a subset of Affordable Housing that adds the criteria of permanent affordability and average income restriction, as defined in Admin Code Section 10.100-78(e). “Municipal Housing” is a subset a Social Housing that is explicitly owned and operated by the City.

The study will have two primary goals: first, define and outline a structure for a pilot phase of a Municipal Housing enterprise agency to create and manage cross-subsidy, mixed income, City-owned housing. This study will include the number of full-time equivalent positions per subdivision and the total departmental cost estimate; and second, provide recommendations on centering tenant perspectives in the execution and structure of the department, especially low-income tenants.

A comprehensive municipal housing program in San Francisco would expand upon the City’s existing partnerships with cooperatively owned affordable housing developments and qualified, community-based, non-profit affordable housing developers. While this study focuses on municipal housing in particular because it is not currently part of San Francisco’s affordable housing portfolio, this study should consider meaningful integrations, economies of scale, and complementary programs between municipal housing and the rest of San Francisco’s affordable housing portfolio to prevent undue competition for funding and resources.

The outcomes of this study, and the final deliverable, will be a report used to inform budget recommendations for implementation of November 2020’s Proposition K, which authorized the City to own, develop, construct, acquire or rehabilitate up to 10,000 units of low-income rental housing and potentially inform the actions of the Housing Stability Fund Oversight Board.

Additional deliverables include, convening and staffing a working group of local housing experts with the goal of soliciting feedback and input for the final report.

With Whom Will Consultants Work?

Consultants will work with the LAFCo Executive Officer, LAFCo policy analyst, LAFCo commissioners and their staff, and potentially other City and County of San Francisco bodies, including but not limited to the Housing Stability Fund Oversight Board. Additionally, the consultants will be required to convene and staff a regular working group of local housing experts with the goal of soliciting feedback and input for the final report; and separately convene focus groups to inform the study.

1.3 Background of the San Francisco Local Agency Formation Commission

Local Agency Formation Commissions (LAFCo) are independent regulatory bodies, created by the California Legislature in 1963, that oversee changes to the boundaries of cities and special districts and conduct studies of municipal services.

Because the City and County of San Francisco are consolidated, and there is no unincorporated territory in its jurisdiction, the San Francisco LAFCo doesn't oversee annexations or boundary changes like other LAFCos. Our LAFCo wasn't formed until 2000 when there was a voter petition drive to create a municipal utility district (MUD) that would extend to include the City of Brisbane.

San Francisco's LAFCo is an independent public agency separate and apart from the government of the City and County of San Francisco.

State law gives LAFCos broad authority to conduct special studies regarding municipal services, and this has been the primary function of the SF LAFCo, including studies on electricity services, refuse, undergrounding of utility wiring, and municipal financial services.

As part of its special studies authority, the LAFCo is studying municipal housing services.

1.4 Organization of the Local Agency Formation Commission

SF LAFCo is governed by a five-member Commission. Three members are appointed by the Board of Supervisors of the City and County from its own membership. The Board of Supervisors also appoints a fourth Supervisor who is an alternate member from its own membership. Two Public Members-at-Large are appointed by the other three commissioners. The Commission may also appoint one alternate public member. The public members and the alternate public member shall be residents of the City and County of San Francisco and shall not be officers or employees of the City and County of San Francisco.

Regular commission meetings are generally held on the third Friday of every odd-numbered month. The LAFCo office is located at City Hall in Room 409. More information is available on the SF LAFCo website at:

<https://sfgov.org/lafco/>

2. Scope and Phases of Work

This scope of work is a general guide to the work the LAFCo expects to be performed and is not a complete listing of all services that may be required or desired.

Phase 1-A: Report and Focus Groups (concurrent to Phase 1-B)

At a minimum, this study will include a report that incorporates the following:

1. A review of (and incorporation as appropriate) and building upon, the following:
 - a. 2013 BLA performance audit on the SF Housing Authority and lessons to learn from the administrative issues of SFHA.¹

¹ https://sfbos.org/sites/default/files/FileCenter/Documents/45587-SFHA%20Audit_Final.pdf

- b. 2023 BLA Performance Audit of Affordable Housing Financing²
 - c. 2024 BLA study on Municipal Housing³
 - d. HSFOB proposal entitled "Housing for the 99%"⁴
2. A review of several existing and proposed municipal housing agencies, such as Montgomery County, Maryland, Los Angeles, New York, Seattle, Atlanta, Vienna, and Singapore.
- a. Reviewing the types of housing the agency operates, the agency's finances, its organizational structure, including which functions are performed in-house or contracted out, and how tenant perspectives are represented in the agency's operations.
 - b. Consulting with relevant California state departments and legislators (such as the Department of Housing and Community Development on the progress of the California Social Housing Study defined by 2023's Senate Bill 555 and the sponsors of Assembly Bill 2881, the Social Housing Act) on how a potential state social housing program would affect the San Francisco municipal housing agency.
3. An analysis of the potential municipal housing entity/agency, including but not limited to:
- a. Defining the research, finance, design, construction management, and administrative/legal expertise the potential entity/agency would need to own and operate a residential real estate portfolio in San Francisco and have the financial nimbleness to act quickly in the City's competitive real estate market.
 - i. This should include designing the entity/agency in a way that can scale beyond a pilot program.
 - ii. The agency should be able to support both rental projects and leasehold ownership projects. The first projects may be focused on rentals for simplicity.
 - iii. Pilot phase should focus on creating the departmental infrastructure needed to support the first Municipal Housing development(s).
 - b. Providing detailed job descriptions, responsibilities, duties, and qualifications for the following entity/agency employees: Property management, Asset management, Resident relations, Regular maintenance, Improvements to design to further San Francisco's Climate Action Plan and other sustainability initiatives (i.e. water reclamation), and others.
 - i. This includes an analysis of whether the following functions are better served in-house (in the potential entity/agency) or contracted out: Managing development (construction, rehabilitation) and subcontractors, Independent resident advocacy support (as the City is the landlord), and others.
 - c. Including robust conflict of interest, ethics, and transparency policies that uphold the values of integrity and democracy.
 - d. Analyzing funding for municipal housing, including:
 - i. An analysis of the applicability of the revolving loan fund model used in Montgomery County, Maryland for social housing, where private construction debt is used for some initial financing, which the City would then buy up after operations have stabilized and tenants are paying rent, ensuring 100% public ownership in the long run.

² https://sfbos.org/sites/default/files/Performance_Audit_Of_Affordable_Housing_Financing_4_4_23.pdf

³ Forthcoming.

⁴ https://sf.gov/sites/default/files/2022-02/Public_Housing_for_All_HSFOB_Proposal_2022-02-14.pdf

- ii. Identifying existing city/county funding and legal support (Prop I, Prop K, etc.) for social housing and assessing impact on potential SF pilot program.
 - iii. Identifying existing and future state and federal affordable housing legislation for funding local and regional social housing programs and discussing impact on potential SF pilot program.
 - iv. Determining the amount of local Housing Stability Fund revenues that may be needed to bootstrap initial department operating costs.
 - e. An analysis of the legality and feasibility under the San Francisco Charter and the potential paths of creating this entity/agency, including but not limited to Charter Amendment and Board of Supervisors Ordinance.
 - i. Include a review of whether this entity/agency can exist within an existing department such as the Mayor's Office of Housing and Community Development, the San Francisco Housing Authority, and others.
 - ii. Include independent governance options that are legally feasible within the current Charter.
 - f. Defining key housing terms including "affordable housing," "public housing," and "social housing" within the context of housing policies in the United States, referencing HUD guidelines and relevant literature; and comparing and contrasting these types of housing with municipal housing.
 - i. This will include an analysis of the current housing landscape in San Francisco, categorizing existing housing stock into affordable, public, and social housing types, highlighting the distribution and availability of each across different supervisory districts and demographic groups. This analysis will provide crucial insights into the City's housing challenges and opportunities, informing the development of strategies for the proposed novel municipal housing agency.
- 4. A minimum of five (5) focus groups during the drafting of the report of San Francisco affordable housing experts, tenants' associations, relevant government agencies (housing agencies, enterprise agencies, etc.), labor unions (including City employee unions), and nonprofits and community-based organizations, that authentically uplift the voices, concerns, and solutions of historically disenfranchised communities and communities of color.
 - a. The goal of the focus groups will be to gather further information about the parameters of the study, the goals of a municipal housing agency, and the challenges that exist in the current affordable housing market and how those may be relevant to a municipal housing agency.
 - b. These focus groups do not need to be open to the public.
 - c. An appendix documenting the type of groups that were interviewed and the general feedback is required in the report. Identifying participants in these focus groups is not required for this appendix.

Phase 1-B: Working Group (concurrent to Phase 1-A)

- 5. Convene and staff a working group of local housing experts with the goal of soliciting feedback and input for the final report.
 - a. There must be a minimum of six (6) meetings during the drafting of the report to allow for sufficient time for meaningful review and feedback.
 - b. One (1) one of the meetings must occur after the final draft of the report.
 - c. Meetings must be open to the public and accessible via the internet.
 - d. Meetings must be open to public comment.

- e. Consultants are not required to accept the feedback or input of the working group or public comment but must document it as an appendix to the final report.

The LAFCo will negotiate the specific scope of services, budget, deliverables, and timeline with the highest-scoring Proposer(s) selected for contract negotiations.

2.1 Scope of Work

Only proposals that outline an approach to all requested items will be considered and must include an estimated budget and methodology.

2.1.1 Final Report and Focus Groups

The selected consultant will produce a final report outlining key findings. The study will have two primary goals: first, define and outline a structure for a “Municipal Housing” enterprise agency for the pilot phase, including the number of full-time equivalent positions per subdivision and the total departmental cost estimate; and second, provide recommendations on centering tenant perspectives in execution and structure of department, especially low-income tenants.

The report must include the feedback of the five (5) focus groups. The goal of the focus groups will be to gather further information about the parameters of the study, the goals of a municipal housing agency, and the challenges that exist in the current affordable housing market and how those may be relevant to a municipal housing agency.

The outcomes of this study, and the final deliverable, will be a report used to inform budget recommendations for Prop K implementation and could potentially be used to inform the actions of the Housing Stability Fund Oversight Board.

2.1.2 Working Group

Convene and staff a working group of local housing experts with the goal of soliciting feedback and input for the final report. There must be a minimum of six (6) meetings during the drafting of the report to allow for sufficient time for meaningful review and feedback. One (1) of the meetings must occur after the final draft of the report. Meetings must be open to the public and accessible via the internet. Meetings must be open to public comment. Consultants are not required to accept the feedback or input of the working group or public comment but must document it as an appendix to the final report. All costs must be part of the not-to-exceed budget.

2.2 Deliverables

Successful completion of the following will be established by a negotiated Agreement between the LAFCo and Contractor to include a complete list of deliverables, timeline and further details shall also be negotiated between LAFCo and Contractor:

1. Final report and Focus Groups

Final report outlining key findings. This report must include appendices of the feedback of the focus groups, the working group, and any public comment during the working group.

Deliverable: Final report

2. Working Group

Identify experts in San Francisco and convene them for a minimum of six (6) meetings open to the public.

Deliverable: Six (6) public meetings of local experts; an appendix to the final report documenting input/feedback from both working group and public.

3. LAFCo-Respondent Communications

Proposers are specifically directed NOT to contact any employees or officials of LAFCo other than those specifically designated in this RFP and its Attachments. Unauthorized contact may be cause for rejection of proposals at the LAFCo's sole and absolute discretion.

3.1 Deadline for RFP Questions

Please e-mail any questions to jeremy.pollock@sfgov.org. Questions will be accepted prior to May 6, 2024 at 5 PM. Questions, in accordance with the below schedule, must be received before the **Deadline for RFP Questions**. No questions will be accepted after this time with the exception of those concerning City vendor compliance. All inquiries should include the number and title of the RFP. Substantive replies will be memorialized in written addenda to be made part of this RFP. This RFP will only be governed by information provided through written addenda.

3.2 Summary of Information Requested and Presented

A summary of all addenda, questions and answers pertaining to this RFP will be posted on the LAFCo website at: <https://sfgov.org/lafco/rfp-municipal-housing-agency-study>

It is the Proposers' responsibility to check this Website for any updates. The LAFCo recommends that Proposers check the Website for updates on a daily basis at a minimum.

For help with the City's Supplier and Bidder Portal, please see:

Frequently Asked Questions:

<https://sfcitypartner.sfgov.org/pages/faq.aspx>

User Support:

<https://sfcitypartner.sfgov.org/pages/contact.aspx>

User Support tel. (415) 944-2442

3.3 LAFCo Communication Following Receipt of Proposals

The LAFCo may contact the Proposers for clarification or correction of minor errors or deficiencies in their Proposals prior to deeming a Proposal as non-responsive. Clarifications are "limited exchanges" between the LAFCo and a Proposer for the purpose of clarifying certain

aspects of the Proposals, and do not give a Proposer the opportunity to revise or modify its Proposal. Minor errors or deficiencies are defined as those that do not materially impact the LAFCo's evaluation of the Proposal; for example, failing to label the "original" Proposal as an "original". For information regarding the LAFCo's Evaluation Process, see RFP Section 4 - Evaluation Criteria.

4. Evaluation Criteria

This section describes the guidelines used for analyzing and evaluating the proposals. It is the LAFCo's intent to select Proposers for contract negotiations that will provide the best overall service package to the LAFCo inclusive of fee considerations. Proposers firms selected for contract negotiations are not guaranteed a contract. This RFP does not in any way limit the LAFCo's right to solicit contracts for similar or identical services if, in the LAFCo's sole and absolute discretion, it determines proposals are inadequate to satisfy its needs. There are two phases to the evaluation process. LAFCo staff first perform an Initial Screening as described in Section 4.1. Responses that pass the Initial Screening process (4.1) including Minimum Qualifications (4.2) will proceed to the Evaluation of Firms (that met Minimum Qualifications) described in Section 4.3. As in all professional service contracts, the LAFCo reserves the right to accept other than the lowest price offer and reject all proposals that are not responsive to this request.

Applicants are required to submit a comprehensive budget proposal detailing the anticipated costs associated with completing the scope of work outlined in this RFP. The budget proposal should include all costs associated with personnel, materials, travel, and any other expenses directly related to the project. Additionally, applicants should provide a breakdown of costs for each phase of work and any subtasks as outlined in the Scope of Work.

Proposals will be evaluated based on several factors, including but not limited to the cost-effectiveness of the proposed budget. The evaluation of cost-effectiveness will consider the alignment of proposed costs with the scope of work, the reasonableness of proposed expenses, and the overall value provided by the proposed budget in relation to the anticipated outcomes of the project. Proposals that exceed the anticipated not-to-exceed project budget of \$200,000 will not be considered.

LAFCo representatives will serve as the Evaluation Team responsible for evaluating Respondents. Specifically, the team will be responsible for the evaluation and rating of the responses for prequalification, and for interviews, if desired by the LAFCo.

4.1 Initial Screening

The LAFCo will conduct an initial screening process to review each proposal for initial determination on responsiveness and compliance with the minimum qualifications. The LAFCo reserves the right to request clarification from the Respondent prior to rejecting a response for failure to meet the Initial Screening requirements. Clarifications are "limited exchanges" between the LAFCo and a Proposer for the purpose of clarifying certain aspects of the Proposal, and will not give a Proposer the opportunity to revise or modify its response.

Proposals received under this RFP that fail to address each of the requested items in sufficient and complete detail to substantiate that the Proposer can meet the LAFCo's minimum

qualifications, will be deemed non-responsive and will not be considered for evaluation. Note that Proposals stating, “to be provided upon request” or “to be determined” or the like, or that do not otherwise provide the information requested (left blank) are not acceptable and may be deemed non-responsive.

4.2 Minimum Qualifications

Any response that does not demonstrate that the Proposer meets these minimum qualifications by the response deadline will be considered non-responsive and will not be evaluated or eligible for award of a contract.

4.2.1 Housing and Administrative Policy Experience

- A. Experience with City, state, federal, and international housing policy and laws, including but not limited to: revolving loan funds or other forms of infrastructure lending, low-income housing tax credits (LIHTC), affordable housing financing strategies, developmental costs and trends, and models of mixed-income social housing both abroad and in the United States.
- B. Experience with City and state government administration laws, including but not limited to: San Francisco’s Charter structure for enterprise agencies, bonding authority, SFERS benefits for employees, the SF Public Utilities Commission, and the utilization of special state districts.

4.2.2 Ability to Draft an Agency Structure

- A. Experience analyzing and/or proposing changes to public sector agency structures.
- B. Experiencing in creating plans with clear metrics and outcomes.

4.2.3 Coordination and Facilitation

- A. Experience facilitating a working group created by a government entity.
- B. Experience coordinating stakeholders in studying the creation of a public sector agency.
- C. Experience facilitating stakeholders on housing policy discussions.

4.2.4 Community Engagement

- A. Evidence of 3-5 years experience coordinating a community planning and engagement process, in partnership with community-based organizations, that authentically uplifts the voices, concerns, and solutions of historically disenfranchised communities and communities of color. (We envision that the lead community engagement point of contact will coordinate overall efforts, and partner/subcontract with community-based partners.)

4.2.5 Staffing

- A. The lead staff proposed to be assigned to LAFCo’s project(s) must individually have had a similar lead role in **both** of the Prior Project Descriptions submitted for Minimum Qualification 4.2.1.

4.3 Desired Qualifications

Proposals will be evaluated based on how they demonstrate the ability to meet the following criteria:

- A. Experience in values-based community planning processes, providing underserved communities with the tools to become effective actors in shaping the future development of their own neighborhoods.
- B. Experience developing local capacity and improving working relationships between stakeholders and local, regional, state and federal agencies.
- C. Experience drafting a structural blueprint for a de novo public sector agency.
- D. Experience providing operational evaluation of existing entities and evaluation of whether the existing entity has enabling provisions and legislation.
- E. Experience with community engagement and facilitation, visualization tools, popular education curriculum for planning and development literacy, and leadership development with community members.
- F. Experience and sensitivity with diverse cultures, experiences and languages, including developing linguistically and culturally accessible workshops, focus groups, and/or working groups.
- G. Demonstrated ability to develop a collective statement of guiding values and broad goals.
- H. Familiarity with municipal housing.
- I. Experience working with the Board of Supervisors, public funding sources, and oversight entities such as MOHCD and SFPUC.
- J. Team is locally based with experience working with San Francisco's low- and moderate-income communities, with demonstrated local relationships and established community partnerships relevant to the project.
- K. Demonstrated experience implementing strategies that center cultural and linguistic competency, participatory planning, popular education (such as focus groups, participatory planning forums, asset mapping, surveying, consensus building processes, community governance processes, etc.), outreach and promotion, and ability to develop authentic relationships across San Francisco's diverse neighborhoods, community institutions, and diverse communities, including Black, API, Latinx and Indigenous communities.
- L. Experience advising government agencies on administrative policies, procedures, and risk management.
- M. Familiarity with innovations in climate change prevention and resilience for housing development, including but not limited to: electrification, CleanPowerSF, decarbonizing building materials, installing solar panels, limiting building material use and waste through recycling or reuse, protecting buildings against the effects of climate change, and energy-efficient insulation.
- N. Familiarity with innovations in housing development or operation that would produce a greater proportion of low-income housing units that are equally safe and tenantable.
- O. Familiarity with labor relations and management issues for public sector agencies, including contract structures, organizational structures, and HR.
- P. Experience analyzing or auditing public sector housing finance/development agencies.
- Q. Familiarity with marketing for public sector housing agencies.

4.4 Response Evaluation Criteria (100 points)

Evaluation Team

Responsive Proposals will be evaluated by a panel (“Evaluation Panel”) consisting of one or more parties with expertise related to goods and/or services being procured through this Solicitation. The Evaluation Panel may include staff from various City departments.

4.4.1 Firm and Staff Qualifications – 50 points

- 1) Firm history and structure, including total staff size and composition.
- 2) Experience providing similar services to municipalities, other government agencies, or non-governmental organizations.
- 3) Capacity and resources to provide the services under this RFP.
- 4) Experience demonstrating the ability to meet the Desired Qualifications listed in Section 4.3.
- 5) Client relationships terminated for reasons other than convenience, if any.
- 6) Clarity and appropriateness of proposed staffing structure.
- 7) Qualifications, educational backgrounds, and relevant experience of lead staff members proposed to perform services for the LAFCo.

4.4.2 Approach and Cost – 50 points

- 1) Work plan/approach demonstrates understanding of the project and the tasks to be performed; and demonstrates ability to complete project in a timely manner;
- 2) Expectations of client involvement or level of effort are appropriate; the proposed approach and questions demonstrate experience with providing services to comparable clients.
- 3) Sufficient expertise and methodology to create competitive differences that will be beneficial to the LAFCo is demonstrated.
- 4) Cost response is sufficiently detailed, reasonable and appropriate.
- 5) Cost response demonstrates fiscal responsibility.
- 6) Alignment of proposed costs with the scope of work, the reasonableness of proposed expenses, and the overall value provided by the proposed budget in relation to the anticipated outcomes of the project.

4.5 Reference Checks

Reference checks may be used to determine: (i) the applicability of Proposer’s experience to the services the LAFCo is requesting, (ii) the quality of services and staffing provided to prior clients, (iii) adherence to schedules/budgets, (iv) Proposer’s problem-solving, project management and communication abilities, (v) performance on deliverables and outcomes, and (vi) effectiveness in meeting or exceeding project objectives. If reference checks establish that information included in a Prior Project Description or elsewhere in the response is untruthful, then the LAFCo may reject the Proposal.

4.6 Oral Interviews

If the LAFCo chooses to conduct interviews, then following the Proposal Evaluation process, the LAFCo may invite Proposers to oral interviews with the Evaluation Team. Oral interviews will consist of standard questions asked of selected Proposers, and specific follow-up questions

regarding individual responses. If interviews are conducted, they will be worth 100 points based on a set of criteria established following review of written responses. The 100 points possible awarded for interviews will be added to the 100 possible points awarded during the Proposal Evaluation process for a total of 200 points. The lead staff members that will be assigned to the engagement should be present for the interview. The LAFCo has sole and absolute discretion over whether interviews will be conducted or not to select Proposers for prequalification.

4.7 Other Terms and Conditions

The successful Proposer will be required to enter into an Agreement substantially in the form of Attachment 2, LAFCo Proposed Agreement Terms. If Proposer is unable to accept City's Proposed Agreement Terms substantially in the form presented, Proposer shall include a revised copy of City's Proposed Agreement with its Proposal. The revised copy of the Proposed Agreement must clearly:

- 1) Mark those sections to which it objects;
- 2) Set forth Proposer's alternative terms with respect to each such section; and
- 3) Explain the basis for each proposed change.

The selection of any Proposer for contract negotiations shall not imply acceptance by the LAFCo of all terms of the response, which may be subject to further negotiation and approvals before the LAFCo may be legally bound thereby.

The LAFCo will select the most qualified and responsive Proposer with whom LAFCo staff will commence contract negotiations. If a satisfactory contract cannot be negotiated in a reasonable time with the selected Proposer, then the LAFCo, in its sole discretion, may terminate negotiations and begin contract negotiations with the next highest scoring Proposer. The LAFCo, in its sole discretion, has the right to approve or disapprove any staff person assigned to its projects by the Contractor before and throughout the contract term. The LAFCo reserves the right at any time to approve, disapprove or modify proposed project plans, timelines and deliverables, provided that all modifications are within the scope of services sought by this RFP.

5. Proposal Submission Requirements

5.1 Time and Method for Submission of Proposals

Proposals and all related materials must be received by **Deadline for RFP Proposals**. Proposals must be delivered by email to jeremy.pollock@sfgov.org.

Late submissions will not be considered, including those submitted late due to mail or delivery service failure.

5.2 Proposal Contents

Proposals must be sent via email with "Municipal Housing Viability Study RFP" included in the subject line.

Response item Checklist:

- **RFP Attachment I** – Proposal Template, including price proposal

- **RFP Attachment II** – Edits to LAFCo’s agreement terms and conditions (include if respondent requests edits to LAFCo’s proposed agreement terms, as described in Section 4.7, Contract Terms and Negotiations)

Complete, but concise responses, are recommended for ease of review by the Evaluation Team. Proposals should provide a straightforward, concise description of the Proposer’s capabilities to satisfy the requirements of the RFP. All parts, pages, figures, and tables should be numbered and clearly labeled.

5.3 Redact Confidential or Proprietary Information

All documents under this solicitation process are subject to public disclosure per the California Public Records Act (California Government Code Section §6250 et. Seq) and the San Francisco Sunshine Ordinance (San Francisco Administrative Code Chapter 67). Contracts, Proposals, responses, and all other records of communications between the City and Proposers shall be open to inspection immediately after a contract has been awarded. Nothing in this Administrative Code provision requires the disclosure of a private person’s or organization’s net worth or other proprietary financial data submitted for qualification for a contract or other benefit until and unless that person or organization is awarded the contract or benefit.

5.3.1 Proposals to RFPs, contracts, and all other records of communications between the LAFCo and Proposers shall be open to inspection immediately after a contract has been awarded. Nothing in this provision requires the disclosure of a private person’s or organization’s net worth or other proprietary financial data submitted for qualification for a contract or other benefit *until and unless that person or organization is awarded the contract.*

5.3.2 Proposers may redact any confidential or proprietary information, as appropriate, prior to submitting a response to this RFP. If the City receives a Public Records Request (“Request”) pertaining to this solicitation, City will use its best efforts to notify the affected Proposer(s) of the Request and to provide the Proposer with a description of the material that the City deems responsive and the due date for disclosure (“Response Date”). If the Proposer asserts that some or all of the material requested contains or reveals valuable trade secret or other information belonging to the Proposer that is exempt from disclosure and directs the City in writing to withhold such material from production (“Withholding Directive”), then the City will comply with the Withholding Directive on the condition that the Proposer seeks judicial relief on or before the Response Date. Should Proposer fail to seek judicial relief on or before the Response Date, the City shall proceed with the disclosure of responsive documents.

5.3.3 Proposers should clearly indicate net worth or other proprietary financial data that the LAFCo should redact should the RFP response be publicly disclosed, with the understanding that this information cannot be redacted or withheld should a contract be awarded to the Proposer.

6. Registering as a City Bidder and Supplier

Proposer Team must fulfill the City’s administrative requirements for doing business with the City and become a compliant vendor prior to contract award. The first step to begin working with the City is to [complete a short registration process](#) to become a "Registered Bidder." This will allow you to view and bid on Sourcing Events.

After becoming a Registered Bidder, you can then advance your status to become a Fully Compliant Supplier, which allows you to be fully awarded City contracts. The steps to do this are as follows:

1. Complete a [San Francisco Business Tax Registration](#)
2. Complete a [12B Equal Benefits Declaration](#)

In addition to the hyperlinked directions above, you can click here to view step-by-step directions on [How to Become a Fully Compliant Supplier](#).

Proposers are urged to begin the supplier registration process as soon as possible. The City provides the following support for this process:

- Create a support ticket: <https://sfcitypartner.sfgov.org/pages/contact.aspx>
- Email user support: sfcitypartnersupport@sfgov.org
- Telephone support: Monday – Friday, 8:30 AM – 5:00 PM: [415-944-2442](tel:415-944-2442)
- One-on-one video conference support: Mondays (Except Holidays) 8:30 AM – 5:00 PM
Please make a reservation by emailing sfcitypartnersupport@sfgov.org