

Request for Proposal

Project

2021 Statewide Needs Assessment, Technical assistance and planning for the HOME-ARP Allocation Plan and Action Plan amendments.

Geographic Scope of Project

State of Idaho

Date of Request

November 5, 2021

Clients

Idaho Housing and Finance Association (IHFA)

Primary Contact

Laura Lind

Idaho Housing and Finance Association

LauraL@ihfa.org

Proposal Submission Deadline

A .pdf version of proposal with links to supporting documents must be received no later than 4:00 pm (MST) December 17, 2021 by IHFA. Proposals will only be accepted electronically. Interested applicants may request access to the online system by email: LauraL@ihfa.org with '2021 Request for Proposal' in the Subject line.

Equal Opportunity

IHFA is an equal opportunity affirmative action contractor. Each proposal will receive consideration without regard to race, color, religion, disability, ancestry, age, sex or national origin. Qualified women- and minority-owned businesses are encouraged to submit proposals. Alternate formats of this document are available on request.

Scope

Idaho Housing and Finance Association (IHFA) seeks a qualified professional consultant to conduct a variety of activities regarding Idaho's affordable housing and homeless demographics, needs, and regional markets to help inform and prepare Idaho's HOME-ARP Allocation plan and substantial amendments to the 2021 Action plan for the HOME-ARP program. Consultant will also present this information to Idaho's citizens and stakeholders and draft a Needs Assessment.

Respondents will follow the Consolidated Plan regarding the Needs Assessment (NA) requirements found in the Consolidated Plan IDIS Desk Guide at <https://www.hudexchange.info/resource/2641/econ-planning-suite-desk-guide-idis-conplan-action-plan-caper-per>.

Consultant must be willing to commit to a timeline that includes several phases, i.e. information-gathering, data collection, stakeholder consultation, pre-draft review, drafting & review, public hearing, and post-draft follow-up.

IHFA is focused on the state of Idaho with exception to the City of Boise who received their own HOME-ARP allocation. Boise is not included in this effort.

The objective of this RFP is to locate a source that will provide the best overall value to IHFA. While price is always a significant factor, other criteria will form the basis of the decision. A full description is available in the Proposal EVALUATION CRITERIA section.

The HOME-ARP allocation plan should reflect federal, state and local laws, including but not limited to laws barring housing-related discrimination on the basis of race, color, national origin, religion, gender, familial status, and disability.

On completion, vendor will provide a presentation of findings and recommendations.

IHFA reserves the right to amend, suspend, terminate, or reissue this RFP, in whole or in part, at any stage. In no event is IHFA liable to respondents for any cost or damages incurred in connection with the RFP process, including but not limited to, any and all costs of preparing a response to this RFP, or any other costs incurred in reliance on this RFP. No respondent shall be entitled to repayment from IHFA for any costs, expenses, or fees related to this RFP. All supporting documentation submitted in response to this RFP will become the property of the IHFA. Respondents may also withdraw their interest in the RFP, in writing, at any point in time, as more information becomes known.

Important dates

December 17, 2021 - Proposal Submission Deadline

January 7, 2022 - IHFA selects consultant

April 1, 2022 - Deadline for Draft

April 15, 2022 – Deadline for final Draft

June 3, 2022 - Deadline for Final Allocation Plan and Substantial Amendments to the Action plan to HUD for review

Timeline

- Drafting activities must take into account the following required timelines: One Post-Draft public hearing, and one Post-draft 30-day public comment period (will occur within the same 30-day timeframe and published in the same notice).
- Consultant will be responsible for setting up, maintaining, and tracking the results of the online statewide housing needs survey. Consultant will then compile and summarize the results of the survey in a report to be posted online and available to the public.
- IHFA will publish all required legal notices and distribute information regarding surveys, legal notices, etc., to the public and stakeholders.

The APPROACH

There are three general phases to the overall project.

Pre-Draft Phase:

Information-gathering and consultation activities*

Subject to IHFA approval, consultant will conduct Citizen Participation and Stakeholder Consultation activities.

***The activities will include the following IHFA-specific activities:**

1. *A Statewide Affordable Housing Needs Survey*

This online survey will be anonymous and controlled by the consultant. Questions will address regulatory requirements of the HOME-ARP (housing type, households served, local housing needs, priority populations, etc.) as each relates to housing and homelessness in the state, and other information as approved by consultant and IHFA. Consultant will collect, compile, analyze, and draft the results of the survey into a report format.

2. *Stakeholder Consultation*

Stakeholder discussions facilitated by Consultant on the dates/times/locations will be TBD and approved by IHFA. Timing will be after the results of the Anonymous Affordable Housing Needs Survey are compiled. IHFA will work with Consultant on discussion items, and email distribution.

Drafting Timeline Phase:

Consultant will submit, an approved and final draft of all activities, at least 1 month prior to the Post-Draft 30-day Comment Period. The Post-Draft 30-day comment period is tentatively scheduled April 25 – May 24, 2022.

The draft will be submitted as a Word Document via email or uploaded to the online portal provided. Each Action plan update must satisfy the requirements outlined in HUD's Consolidated Plan Desk Guide <https://www.hudexchange.info/programs/consolidated-plan/guides/#consolidated-plan-template-in-idis>

Post Draft Phase:

- Consultant will be available to provide additional information/responses as needed for the Action plan and Allocation plan until approved by HUD.

IHFA RESPONSIBILITIES

- Provide stakeholder contact information
- Publish legal notices in Idaho's major newspapers, and IHFA branch office
- Post online surveys, plans, notices etc. on IHFA
- Once approved, pay detailed invoices within 30 days
- Review drafts submitted by Consultant within 30 days
- Enter Consultant's data and draft information into the appropriate sections of the eCon Planning Suite in IDIS
- Submit the 2021 Action Plan Amendment to HUD by June 3, 2022

PROPOSAL FORMAT

1. Introductory letter that includes the primary contact for the project
2. Statements of qualification and experience for the entity and all individuals involved in the project:
 - (a) Description of similar projects that were successfully completed
 - (b) Name and contact information of previous clients
 - (c) Name and resume of the project manager
 - (d) Names and experience of others not listed, but may work on the project
3. Detailed description of the entire project including individual tasks/activities
4. Schedule and detailed timeline
5. Budget with cost breakdown by individual task/activity

Proposal EVALUATION CRITERIA

Clients will select the proposal that most closely demonstrates current experience and competence in areas specified below. Clients require accurate data and sound projections in our partnerships and activities. Along with our partners and constituents, we realize that sound policy decisions cannot be made without reliable and pertinent information. In general, we will focus on four main areas in evaluating proposal submissions:

General Criteria

Vendor capacity. Vendor must possess staff and expertise sufficient to address project research; data collection, organization and analysis; and document coordination and production in a timely manner.

Portfolio. Vendor must document production and delivery of projects and products on a scale similar to the proposed project. Samples must meet the highest professional standards in content, organization, utility, formatting/typesetting and basic production values.

References. Vendor references must address Clients’ areas of interest and concern.

Direct experience. Vendor must demonstrate to Clients’ satisfaction an expert-level knowledge of housing and community development, and related industries; familiarity with similarly-situated rural states and communities, needs and challenges and an ability to work with all appropriate stakeholders.

Clients explicitly seek Vendor with detailed and first-hand experience with specific challenges in rural western states.

Specific Criteria and Scoring

Proposals will be rated and ranked in accordance with the following criteria:

1. Continuity and stability of Vendor(15 points)
 - a. Business résumé and years in operation
 - b. References
 - c. Legal structure
 - d. Financial stability
2. Technical qualifications of individuals to be assigned to project.....(30 points)
 - a. Team/subcontractor skills and expertise (limit team member bios to 1 page each)
 - b. Knowledge of current issues and trends involving the HOME-ARP program
 - c. Identify project manager responsible for day-to-day management of project tasks and who will serve as primary point of contact for Clients.
3. Vendor's demonstrated ability and capacity(25 points)
 - a. Qualifications and experience in providing the requested services as exemplified by past projects that demonstrate an understanding of the HOME-ARP Program and HUD required Allocation and Action Plan planning process.
 - b. Satisfactory performance on previous and present contracts similar in scope to this RFP.
 - c. List of public sector clients whom you have performed similar work in the past 2 years.
 - d. Any alternative approach that the Clients may wish to consider.
4. Quality of proposal(15 points)
 - a. Approach for conducting Needs Assessment (sample data sources and relative impact on outcome)
 - b. Specific methodologies for completing various aspects of the Needs Assessment.
5. Ability to meet proposed timeline.....(15 points)

Note. Finalists may be asked to provide a virtual presentation if necessary. Final selection will be up to the discretion of IHFA.

Proposal SELECTION PROCESS

- (1) IHFA will review each proposal that meets the evaluation criteria. Phone interview may be conducted for additional clarification
- (2) Proposal will be selected **by January 7, 2022**
- (3) Scope of work, drafting and submission timeline, and price will be negotiated with the successful contractor.
- (4) If IHFA and the contractor are unable to reach an agreement, IHFA retains the right to move on and negotiate with other contractors.

PROPOSAL SUBMISSION Requirements

Submission length and deadline. Proposals shall not exceed ten pages (excluding key personnel bios), and shall include links to online work samples. Completed proposals should be submitted electronically no later than 4:00 pm (MST) December 17, 2021. Late or incomplete submittals will be rejected

Questions. Vendor questions must be submitted by email to Laural@ihfa.org no later than November 19, 2021. After Client review, responses will be available on or before November 26, 2021 at: <https://www.idahohousing.com/federal-programs/legal-notice-plans-and-reports/>

General information & Requirements

- All work will be performed on a fixed-rate, cost-incurred basis. IHFA will retain 10 percent (10%) of each payment request. Final retainage (payment) is subject to a satisfactory final product, as determined by IHFA.
- If IHFA determines progress, as measured by the agreed upon timeline and activity description, is inadequate, it reserves the right to terminate the contract with a 30-day written notice.
- IHFA strongly desires continuity of lead staff. Therefore, when key staff are replaced, if IHFA deems the replacement unacceptable, consultant will have 30 days from date IHFA issues such notice in writing, to provide acceptable replacement staff by written notice. Failure to do so may be defined as a breach of contract and subject to cancellation.
- Copy of proposal (.pdf copy via procore) including transmittal letter signed by a Vendor representative authorized to approve bid amount.
- Any changes in project cost, timeline, or scope during the contract must be pre-approved in writing by both the parties.

Questions/Inquiries

Laural@ihfa.org

Contract Terms and Conditions

Indemnity by Vendor

Vendor must covenant and agree to indemnify and hold Clients and Clients' Partners harmless from any and all claims, demands, liabilities, actions, fees, costs or expenses of any kind relating to, arising from or out of, or incidental to any negligent or intentional actions of Vendor in performance of Vendor's obligations hereunder or in performance of services on behalf of Clients. This indemnity is irrevocable and severable from, and shall survive the termination of any Agreement resulting from Vendor selection. This indemnity does not extend to Clients' obligations to affirmatively further fair housing.

Proof of Insurance

Proof of Vendor's current Worker's Compensation Insurance coverage for any and all principals and employees of Vendor is a condition of any agreement resulting from Vendor selection.

Independent Contractor Status

Both Client and Vendor agree that Vendor will act as an independent contractor in the performance of the duties under this Agreement and that this Agreement does not create an employer-employee relationship between the parties. Accordingly, Vendor shall be responsible for payment of all taxes including Federal, State and local taxes arising out of Vendor's activities in accordance with this Agreement, including by way of illustration but not limitation, Federal and State income tax, Social Security tax, Unemployment Insurance taxes, Workers' Compensation taxes, and any other taxes or business license fees as required.

Production and Distribution Rights

Clients retain all rights to additional production and distribution of final document to intended audience groups as needed, including text, graphics, photos or other attachments contained in the finished product, with source attributions as presented by Vendor.

Reservation of Rights

IHFA reserves the right to reject any and all proposals, to waive any irregularities in the proposals received, and to accept the proposal(s) deemed in the best interests of the partners and our constituents. Following receipt and initial review of proposals, IHFA may schedule interviews for the top-ranked proposals if necessary.