REQUEST FOR PROPOSALS

Housing Program Audit

May 13, 2022

City of Campbell
Community Development Department
70 N. First Street
Campbell, CA 95008
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Overview

The City of Campbell is seeking the services of a consultant to perform a comprehensive audit of its Housing Program and recommend a program improvement plan.

The City’s Housing Program is managed part time by one Senior Planner (0.4 FTE) within the Community Development Department and supported by two consultants. The first consultant, HouseKeys, serves as the City’s BMR Housing Administrator and is primarily responsible for preparing and maintaining BMR guidelines and program materials, coordinating all real estate transactions and agreements, conducting annual compliance monitoring, and enforcing BMR agreements and deed restrictions. HouseKeys oversees approximately 217 active units, consisting of 84 homeownership units, 51 rental units, and 82 loan units. The second consultant, Project Sentinel, provides landlord/tenant counseling and mediation services and, accordingly, is primarily responsible for resolving complaints over unit conditions and lease disputes.

The City is currently finalizing its 2023-2031 Housing Element (“Campbell’s Plan for Housing”) and through its implementation is planning for the development of over 1,685 new Below Market Rate (BMR) housing units over the next eight years. As this growth will significantly expand the size of the BMR Housing program, the City would like to now create a new program business model that has sufficient management capacity and fiscal resiliency for this oversight. Program enhancements needed for the BMR Housing program were explained in more detail within a staff report presented to the City Council on March 15, 2022.
Preliminary Scope of Work

The following preliminary scope of work is presented as an initial outline to help the consultants gauge the minimum level of work requested and to submit a realistic project proposal. If the consultant identifies opportunities to improve the required scope of work leading to a stronger and more fiscally resilient housing program, the consultant is encouraged to submit proposals for alternative options.

Project Approach

- Determine if the preliminary scope of work includes the steps necessary to prepare a comprehensive audit of the City’s Housing Program as described in the ‘Overview’. You are encouraged to include additional steps and options so long as it results in a stronger proposal.
- Review the preliminary project schedule and amend it, if it is determined that a revised schedule will achieve an improved outcome.

Staff Coordination

- Facilitate bi-weekly conference calls (~30 min between the City and Consultant Project Manager).

Project Management

- Should subconsultants be utilized, the prime consultant shall manage and review the subconsultant work product prior to City staff review.

Meeting Attendance

- Attend one (1) kick-off meeting with staff.
- Prepare to actively participate in a City Council meeting (plan to attend, present, and be a resource to the Council on questions). The cost for the meeting should be priced out individually in the event a greater number of meetings are required.

Deliverables

- Kick-Off Meeting Agenda

Note: All work products noted shall be provided in Word and PDF format.
Tasks

A. **Project Kickoff.** Consultant will prepare a meeting agenda and attend a kickoff meeting with City staff to discuss expectations, general goals, required resources, and schedule for the project.
   - **Deliverable:** Kick-Off Meeting Agenda
   - **Deliverable:** Detailed Meeting Notes

B. **Initial Housing Program Review.** Following the project kick-off meeting, consultant shall review resources and materials provided by staff to conduct an initial review of the existing Housing Program. In reviewing program materials and resources, the consultant shall prepare a matrix identifying key components of the program, responsible party, and any areas for improvement. Where an area for improvement is identified, the consultant shall provide a suggested ‘priority’ depending on the severity of the issue and suggested strategy for improvement. The consultant shall then prepare an overview of their initial impressions of the program and the resources required to prepare it for anticipated growth and increases in service demands.
   - **Deliverable:** Housing Program Overview Summary
   - **Deliverable:** Issue Identification / Improvement Strategy Matrix

C. **Model Housing Program Examples.** Provide examples of exemplary housing programs in other jurisdictions that have the management capacity and financial resiliency comparable to the future needs of Campbell’s Housing program. This would include programs that use an efficient management structure, balancing city staff and consultant services, a diversified financial model that ensures sustained funding, and a track record of implementing effective housing programs that support the different housing needs in the community.

D. **Draft Housing Program Business Model.** Based on the review of Campbell’s housing program, evaluation of comparable case study housing programs, the consultant shall identify a new Housing Program Business Model for Campbell. This would include a summary of all upcoming program demands, anticipated costs, and potential revenue streams. The consultant shall identify funding gaps and potential solutions based on industry best practices. Further, the consultant shall project out service demands for the next eight years to implement objectives, policies, and programs included in Campbell’s Plan for Housing and suggest how to best manage workload demands while achieving program goals.
   - **Deliverable:** Draft Housing Program Business Model

E. **Refined Housing Program Business Model.** Based on feedback from Staff, the consultant shall refine the Housing Program Business Model and provide any suggested program materials to improve the program that should be considered with its adoption.
   - **Deliverable:** Refined Housing Program Business Model

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1 In response to COVID-19, the consultant should be prepared for meetings to be held virtually, in-person, or in a hybrid (in-person and virtual) format.
✓ Deliverable: Draft Program Materials

F. Attend City Council Meeting. Consultant will attend a meeting with the City Council providing an overview of their findings of the audit of Campbell’s Housing Program and a presentation of the recommended housing program business model and any final program materials.

✓ Deliverable: Preparation of a power point presentation
✓ Deliverable: Preparation of a staff report
✓ Deliverable: Attendance and public speaking role
Project Funding

- Cost proposals that stay under $50,000 are expected with optional items being itemized in addition to this amount.

Desired Qualifications

The ideal consulting firm would include the following disciplines and attributes:

- Background in the administration or review of local government housing programs.
- A focus on policy development and financial modeling.
- A highly organized and responsive team who listens to, partners with, and is passionate about collaboration with city staff and decision makers.
- A strategic project manager with experience preparing reports and presenting findings.

Submittal Information

Minimum Eligibility Requirements

Eligible firms shall be those with experience in housing and public administration related to the major components of this Request for Proposals.

Submittal Requirements

Proposals must contain the following information listed in the following order:

1. **Cover Letter.** Please include a cover letter stating project interest which includes:
   - A statement describing why your firm is qualified to complete the project and perform the work required in a responsive manner.
   - A description of the anticipated interaction between consultant and City.
   - Identification of the project manager and main point of contact.

2. **Review of Preliminary Scope of Work.** Review the preliminary scope of work and provide comments, suggested modifications, changes and/or additions as appropriate.

3. **Review of Preliminary Project Schedule.** Review the preliminary project schedule and provide comments, suggested modifications, changes and/or additions as appropriate. Indicate resources that will be allocated to each major task to meet this schedule, and discuss
your firm’s flexibility and record in “catching up” if milestone dates are not met. Discuss your firm’s commitments to other projects in the time frame coinciding with this project.

4. **Qualifications and Capabilities.** Provide a detailed discussion of the qualifications and experience of the Project Manager that would be assigned to this project. Provide additional information regarding the qualifications and experience of all others that will be assigned to work on the project team. Please submit resumes of only those individuals that will actually be assigned to work on the project. Indicate how your firm’s resources will work together to complete this project. An organizational chart is recommended.

5. **Subconsultants.** Identify any subconsultants your firm will utilize to complete this project. Briefly describe your firm’s past experience, working relationship and involvement in joint projects with these subconsultants. Provide additional information regarding the qualifications and experience of all others that will be assigned to work on the project team. Please submit resumes of only those individuals that will actually be assigned to work on the project.

6. **Related Project Experience.** Describe your firm’s Project Manager’s past performance on similar projects, including coordinating the work of subconsultants. Provide locations, description of work, work samples or links to samples, completion dates, and value of contracts. Address your firm’s record of meeting schedules and controlling costs. Provide an explanation gauging how successful implementation of the referenced project experience has been in realizing the municipality’s goals.

7. **Sample Products.** Gaining an understanding of the products prepared by the consulting firm is important for the evaluation committee. Please provide PDF files on a memory stick (or internet links) to no more than three comparable documents prepared by the consulting firm.

8. **Project Team Consistency.** Explain how you can guarantee that the project team members will be accessible and able to complete the project without change.

9. **References.** Include names, email addresses and phone numbers for a minimum of three (3) references where you prepared similar products.

10. **Fee Estimate.** Submit a fee estimate for each task outlined in the preliminary Scope of Work. Provide a breakdown of the fee for each task showing the estimated hours of each project staff member assigned to the task and the associated fee for that project staff member or subconsultant. Also provide hourly rate schedules for all key project staff, including subconsultants.

11. **Insurance Coverage.** Identify carriers, A.M. Best ratings, types and limits of insurance carried by your firm. Provide a statement verifying that your firm meets or will meet the insurance requirements.
12. **Additional Information.** Please provide a list of contracts/agreements terminated for convenience or default within the past three years, if any. List any litigation that now affects or may affect in the future the firm’s ability to perform.

**Submittal Deadline and Instructions**

The submittal should be prepared in 8 ½” x 11” page format using a 12-point font size for the text. PDF files. The materials may be provided on a memory stick or emailed as internet links (please test your links to ensure that no permissions are required for access). Please do not submit information that must be returned.

Proposals must be received no later than 5:00 p.m., June 13, 2022, and delivered to the **City Clerk’s Office** as follows:

City Clerk’s Office  
City of Campbell  
70 N. First Street,  
Campbell, California 95008  
clerksoffice@campbellca.gov

Questions related to the Request for Proposals (RFP) must be submitted in writing and/or via email to clerksoffice@campbellca.gov.
**Consultant Selection Process**

**Short List Selection Process**

A review committee will evaluate all responses to the Request for Proposals that meet the submittal requirements and the submittal deadline. Those submittals that do not meet the submittal requirements or the deadline will not be considered.

A preliminary ranking of consultant firms will be developed based on a review of each respective applicant’s Proposal. Based on this ranking, a short list of consultants will be established, and contacted in writing for interviews.

**Finalists Invited for Interview**

One interview with each of the top-ranking firms will be held to establish the final ranking. Approximately twenty (20) minutes will be allowed for presentations and no more than thirty (30) minutes for questions by the selection group. The consultant’s proposed Project Manager must lead the presentation.

**Selection Criteria**

The following selection criteria will be used to rank both the Proposal and interview of the finalists.

1. Responsiveness to the issues identified in the RFP.
2. Familiarity with the challenges presented by the project.
3. Technical skills and expertise of the firm and their ability to manage a team (or team of subconsultants) to produce a complete and coordinated set of documents required by this project.
4. Relevant experience and demonstrated ability to complete a similar project in difficult communities.
5. Proven ability to complete all phases of a project within the budget and aggressive work schedule established by past clients.
6. Reputation for personal and professional integrity and competence, and key personnel’s professional background, caliber and availability for this project.
7. Qualifications and experience of proposed subconsultants identified for this project (if applicable).
8. Experience of lead consultant and subconsultant working together as a team (if applicable).
9. Familiarity with and proximity to the City of Campbell.
10. Review of firm’s current, and projected workload in the time frame coinciding with this project.
11. Ability to communicate clearly and concisely.
**Additional Information**

The City reserves the right to accept or reject any or all Request for Proposals, or to alter the selection process in any way, to postpone the selection process for its own convenience at any time, and to waive any defects in the Request for Proposals. The City also reserves the right to accept or reject any individual subconsultant that a candidate proposes to use. This RFP and the interview process shall in no way be deemed to create a binding contract or agreement of any kind between the City and the candidate. The City’s standard form of consultant agreement will form the basis of the contract between the parties.

Each candidate submitting a proposal acknowledges and agrees that the preparation of all materials for submittal to the City and all presentations, related costs and travel expenses are at the candidate's sole expense and the City shall not, under any circumstances, be responsible for any cost or expense incurred by the candidate. In addition, each candidate acknowledges and agrees that all documentation and/or materials submitted with the RFP shall remain the property of the City.
Project Schedule

The preliminary scope of work is anticipated to take four months to complete from the execution of the project contract. The proposal shall include a conceptual project schedule outlining potential steps in the process.
Insurance Requirements

CONSULTANT shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to properties, which may arise from, or in connection with, the performance of the work hereunder by the CONSULTANT, his agents, representatives, employees, or sub-consultants. The cost of such insurance shall be included in the CONSULTANT’s fee.

A. Minimum Scope of Insurance

Coverage shall be at least as broad as:

1. Insurance Services Office form number GL 0002 (Ed. 1/96) covering Commercial General Liability and Insurance Services Office form number GL 0404 covering Broad Form Commercial General Liability; or Insurance Services Office Commercial General Liability coverage (“occurrence” form CG 0001), including X, C, U (explosion, collapse, underground).

2. Insurance Services Office form number CA 0001 (Ed. 12/93) covering Automobile Liability, code 1 “any auto”, or code 2 “owned autos” and endorsement CA 0025. Coverage also to include code 8 “hired autos” and code 9 “non owned” autos.


4. Errors and Omissions Liability insurance appropriate to the CONSULTANT’s profession.

B. Minimum Limits of Insurance

CONSULTANT shall maintain limits no less than:

1. Commercial General Liability: $2,000,000 per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to this project/location or the general aggregate limit shall be twice the required occurrence limit.

2. Automobile Liability: $1,000,000 combined single limit per accident for bodily injury and property damage.

3. Workers’ Compensation and Employers Liability: Workers’ Compensation limits as required by the Labor Code of the State of California and Employers Liability limits of $1,000,000 per accident.
4. Errors and Omissions Liability: $1,000,000 per occurrence.

C. **Deductibles and Self-Insured Retentions**

Any deductibles of self-insured retentions must be declared to, and approved by, the CITY. At the options of the CITY, either: the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects the CITY, its officials, employees, agents, and contractors; or the CONSULTANT shall procure a bond guaranteeing payment of losses and related investigations, claim administration, and defense expenses in an amount specified by the CITY.

D. **Other Insurance Provisions**

The policies are to contain, or be endorsed to contain, the following provisions:

1. **General Liability and Automobile Liability Coverages**

   a. The CITY, its officials, employees, agents, and contractors are to be covered as an additional insureds as respects: liability arising out of activities performed by, or on behalf of, CONSULTANT; products and completed operations of the CONSULTANT; premises owned, leased, or used by the CONSULTANT; or automobiles owned, leased, hired, or borrowed by the CONSULTANT. The coverage shall contain no special limitations on the scope of protection afforded to the CITY, its officials, employees, agents, and contractors.

   b. The CONSULTANT’s insurance coverage shall be the primary insurance as respects the CITY, its officials, employees, agents, and contractors. Any insurance or self-insurance maintained by the CITY, its officials, employees, agents, or contractors shall be excess of the CONSULTANT’s insurance shall not contribute with it.

   c. Any failure to comply with the reporting provisions of the policies shall not affect coverage provided to the CITY, its officials, employees, agents, or contractors.

   d. Coverage shall state that CONSULTANT’s insurance shall apply separately to each insured against whom claim is made or suit is brought except with respect to the limits of the insurer’s ability.

2. **All Coverages**

   Each insurance policy required by this clause shall be endorsed to state that coverage shall not be suspended, voided, canceled, or reduced in limits except after thirty (30) days’ prior written notice has been given to the CITY.

E. **Acceptability of Insurers**

Without limiting Consultant's indemnification provided hereunder, Consultant shall take
out and maintain at all times during the life of this contract, up to the date of acceptance of the work by the City, the policies of insurance listed in Article 9.2 of this Agreement. Insurance is to be issued by an issuer with a current A.M. Best Rating of A:VII and be authorized to transact business in the State of California, unless otherwise approved by the City.

F. Verification of Coverage

CONSULTANT shall furnish the CITY with certificates of insurance and with original endorsements affecting coverage required by this clause. The certificates and endorsements for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf.

Copies of all the required ENDORSEMENTS shall be attached to the CERTIFICATE OF INSURANCE, which shall be provided by the CONSULTANT’s insurance company as evidence of the stipulated coverages. This proof of insurance shall then be mailed to:

   CITY OF CAMPBELL
   Community Development Department
   70 North First Street
   Campbell, CA 95008-1423

G. Subconsultants

CONSULTANT shall include all subconsultants as insureds under its policies or shall obtain separate certificates and endorsements for each subconsultant.