

# **REQUEST FOR QUALIFICATIONS No. 21-01**

Assistance with the Establishment of the Western  
Riverside Regional Housing Trust

3/17/2021



Western Riverside Council of Governments  
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## 1. SUMMARY

The Western Riverside Council of Governments (WRCOG) is a joint powers authority whose purpose is to unify Western Riverside County so that it can speak with a collective voice on important issues that affect its members. Representatives from eighteen (18) cities in Western Riverside County, the Riverside County Board of Supervisors, and the Eastern and Western Municipal Water Districts have seats on the WRCOG Executive Committee, the policy setting Board for the Agency. The Riverside County Superintendent of Schools is an ex-officio member of the Executive Committee. As a joint powers authority, WRCOG examines a range of regional matters critical to Western Riverside County's future. More information on the range of WRCOG's programs and the operations of the Agency can be found at [www.wrcog.us](http://www.wrcog.us).

HCD has established a Regional Early Action Planning (REAP) Grant Program that will be administered through the Southern California Association of Governments (SCAG) and is also meant to assist jurisdictions in increasing housing planning and accelerating housing production. SCAG has established a Subregional Partnership Program which will make \$1.678 million available to WRCOG. The goals of the Subregional Partnership Program are to align resources with allocation methodology for the Sixth Cycle of RHNA to support local jurisdictions in addressing identified housing needs, and advance the Connect SoCal sustainable development goals including supporting local jurisdictions in promoting housing in priority growth areas to increase access to jobs and transit and reduce environmental impacts.

WRCOG has developed a list of projects for the WRCOG subregion based on the criteria set forth by SCAG. The list of projects has been approved by SCAG and includes the establishment of the Western Riverside Regional Housing Trust. WRCOG is releasing this RFQ to solicit services to establish the Trust which will entail, but is not limited to, the following tasks: identifying and establishing relationships with participants in the Trust Steering Committee, creating and negotiating a Joint Powers Agreement formation for the Trust, developing an Administrative Plan and Bylaws for the Trust and any project management tasks on-behalf of WRCOG related to the Trust or housing activities.

WRCOG is releasing this RFQ to attain qualifications with firms that have direct experience in establishing Housing Trusts. Such experience must include, but is not limited to, the following services and tasks:

- The formation and operation of a Housing Trust
- Preparation of applications and Proposals to various private and public funding agencies for acquisition, predevelopment, construction and permanent financing
- Establishing relationships with the private sector to create and foster positive relationships along with Community Based Organizations (CBOs), city departments, residents, and elected officials and other stakeholders
- Effectively communicate with the business community, banking community, and neighborhood organizations in Western Riverside County
- Identifying projects and programs that provide homeless, extremely low, very low-, and low-income housing
- Representing organizations in local and regional partnerships
- Developing non-Trust sources of financial support for Trust operations, Trust supported projects, Trust formulated affordable housing policies, and endowments for the Housing Trust Fund.
- Providing technical assistance and expertise on affordable housing grant programs
- Representing organization with meeting attendance and presentations
- Development and monitoring of key performance indicators and metrics to measure impact and for sharing data related to funding options for revitalization projects and neighborhood demographics

A Regional Housing Trust is a new initiative for WRCOG so overall advisory services are sought. WRCOG is only interested in the experience that proposers have with the types of services and tasks listed above. Submittals should emphasize direct experience as this is something WRCOG values.

Submitters are not required at this time to submit detailed scopes and budgets but must submit hourly rates for staff that will provide services as part of this RFQ. Following the review of Statement of Qualifications, WRCOG may request detailed scopes and budgets from selected proposers or may issue an RFP.

## 2. SUBMISSIONS

All submittals must be submitted via e-mail and must be **submitted** by **Thursday, April 22, 2021, no later than 2:00 p.m. Pacific Standard Time (PST)** to:

<b>Name</b>	Western Riverside Council of Governments
<b>Phone</b>	(951) 405-6711
<b>Attn</b>	Christopher Tzeng, Program Manager
<b>Email</b>	<a href="mailto:ctzeng@wrcog.us">ctzeng@wrcog.us</a>

Submittals shall include a Table of Contents listing all sections, disclosures, etc., and their corresponding page numbers. **Please review Section 13 for additional details.** It shall be the responsibility of the Submitter to email the Submittal and all other required items to the WRCOG staff member specified in this RFQ prior to 2:00 p.m. PST on Thursday, April 22, 2021. WRCOG will not accept any Submittals received after the submission time and date.

## 3. QUESTIONS AND ANSWERS REGARDING THIS RFQ

Questions must be submitted by Wednesday, April 7, 2021, at 2:00 p.m. in email to:

<b>Name</b>	Christopher Tzeng, Program Manager
<b>Email</b>	<a href="mailto:ctzeng@wrcog.us">ctzeng@wrcog.us</a>

Answers for questions posed by vendors will be posted to the WRCOG website by Friday, April 9, 2021. It is the responsibility of the Proposer(s) to check the WRCOG website for the questions posed by vendors and replies from WRCOG staff.

## 4. PRE-SUBMITTAL MEETING

WRCOG will be hosting a pre-Submittal meeting on Tuesday, April 6, 2021, at 10:00 a.m. to discuss this RFQ. The meeting will convene via Zoom. Please contact Christopher Tzeng ([ctzeng@wrcog.us](mailto:ctzeng@wrcog.us)) for the Zoom information. Participation is encouraged but not mandatory.

## 5. BUDGET

WRCOG has received approval from SCAG for a budget of \$328,000 to establish the Western Riverside Regional Housing Trust. This budget will be utilized by a combination of WRCOG staff and consultant time. A breakdown of hours has yet to be determined and the dollar amount allocated for this budget is subject to change. As noted above, no detailed scope of work or budget are required at this time, but submittals should include the hourly rates for staff that will provide services as part of this RFQ.

**6. SCHEDULE OF EVENTS**

Event	Date
1. RFQ Distribution	March 18, 2021
2. Pre-Submittal Meeting via Zoom	April 6, 2021 (10:00 a.m.)
3. Questions from vendors about project due	April 7, 2021 (2:00 p.m.)
4. Answers for questions posed by vendors posted to WRCOG website	April 9, 2021
5. Qualifications Due Date	April 22, 2021 (before 2:00 p.m.)
6. Review of Submittals	April 26 – April 30, 2021
7. Potential Interviews	Week of May 10, 2021
8. Anticipated decision and selection of vendor(s)	May 17, 2021
9. Anticipated commencement date of work	June 2021

The interview schedule may be staggered, depending on the number of Submittals received, and could span multiple weeks.

**7. WRCOG RIGHTS**

Award of a contract resulting from this RFQ will be based upon the most responsive Submittal or Submittals which will be most advantageous to WRCOG in terms of cost, functionality, and effectiveness in meeting goals and objectives, and other factors as specified in this RFQ.

A. WRCOG reserves the right to:

- Disqualify any and all Submittals that are not submitted in accordance with the required format described in this RFQ.
- Reject any and all Submittals submitted.
- Request additional information.
- Issue Addenda to this RFQ.
- Award all or part of the work contemplated in this RFQ.
- Remedy errors in the RFQ.
- Cancel the entire RFQ.
- Issue a subsequent RFQ.
- Approve or reject the use of a particular subcontractor / supplier.
- Negotiate with any, all, or none of the Proposers. If WRCOG is unable to negotiate final contract Terms and Conditions that are acceptable to WRCOG, WRCOG reserves the right to award the contract to another Proposer(s).
- Accept other than the lowest priced Submittal.
- Award a contract without interviews, discussions, or negotiations.
- Award a contract to one or more Proposers.

B. WRCOG may, at its discretion, and without explanation to prospective Proposer(s), at any time, choose to discontinue this RFQ without obligation to such prospective Proposer(s).

- C. All Proposers should be aware of the insurance requirements for Contract Award. The Certificate of Insurance must be provided by the successful Proposer(s) prior to Contract Award. A contract may not be awarded if insurance requirements are not met.
- D. WRCOG does not reimburse for the cost of Submittal preparation, even in the event of RFQ cancellation.
- E. Communication between the Proposer(s) and any member of the Submittal Review Committee during the selection process is prohibited, except in the manner expressly authorized in this RFQ. Violation of this restriction is grounds for disqualification of the communicating Proposer's(s') Submittal.
- F. Every Submittal is considered a firm offer that must be valid for a minimum of ninety (90) calendar days.
- G. If applicable, WRCOG prefers that software developed under WRCOG's contract not incorporate proprietary and / or third-party software components. This does not preclude the development of deliverables, which interface with commonly available, off-the-shelf software. However, contractors must determine in advance whether WRCOG already has, or is willing to procure, appropriate licenses for any proprietary and/or third-party software that would be required. Contractors must also provide the impacts of any enhancements and upgrades. WRCOG will require delivery of documentation and source code for all electronic intellectual property developed under a WRCOG contract prior to releasing final payment to the contractor.

**8. ADDENDA**

WRCOG reserves the right to revise the RFQ documents. Any WRCOG changes to the requirements will be made by written addenda to this RFQ. Any written addenda issued pertaining to this RFQ shall be incorporated into the terms and conditions of any contract resulting from this RFQ. Addenda will be posted on the WRCOG website. It is the responsibility of the Proposer(s) to check the WRCOG website to determine if any addenda have been issued. WRCOG will not be bound to any modifications to or deviations from the requirements set forth in this RFQ as the result of oral instructions. Proposers shall acknowledge receipt of addenda in their Submittal. Failure to acknowledge receipt of all addenda may cause the Submittal to be deemed non-responsive to this RFQ and be rejected without further evaluation.

**9. NOTIFICATION OF RIGHT TO PROTEST CONTRACT AWARD**

Proposer(s) have the right to protest the contract award. A written protest must be filed with WRCOG's Director of Transportation & Planning within five (5) working days after the decision of award is made. WRCOG will not accept any verbal protests. The protest must be a detailed, written statement of the protest grounds and reference the RFQ Number and name of the designated Contracts Administrator. Grounds for a protest are that WRCOG failed to follow the selection procedures and adhere to requirements specified in this RFQ or any addenda or amendments, there has been a violation of conflict of interest as provided by California Government Code Section 87100 et seq., or violation of State or Federal law. WRCOG will only consider those specific issues addressed in the written protest. The protest must be submitted to WRCOG via 1) certified mail and 2) e-mail using the contact information provided below.

<b>Name</b>	Christopher Gray, Deputy Executive Director
<b>Address</b>	3390 University Avenue, Suite 200, Riverside, CA 92501
<b>Phone</b>	(951) 405-6710
<b>Email</b>	<a href="mailto:cgray@wrcog.us">cgray@wrcog.us</a>

A written response from WRCOG will be directed to the protesting Proposer(s) within fourteen (14)

calendar days of receipt of the protest, advising of the decision with regard to the protest and the basis of the decision.

**10. CONFLICTS OF INTEREST**

All Proposers responding to this RFQ must avoid organizational conflicts of interest which would restrict full and open competition in this procurement. An organizational conflict of interest means that due to other activities, relationships, or contracts, a Proposer is unable, or potentially unable, to render impartial assistance or advice to WRCOG; a Proposer’s objectivity in performing the work identified in the Scope of Work is or might be otherwise impaired; or a Proposer has an unfair competitive advantage.

**11. CONTACT**

Any questions concerning technical specifications or Submittal requirements must be directed to:

<b>Name</b>	Christopher Tzeng, Program Manager
<b>Phone</b>	(951) 405-6711
<b>Email</b>	<a href="mailto:ctzeng@wrcog.us">ctzeng@wrcog.us</a>

**12. CRITERIA**

Any award to be made pursuant to this RFQ will be based upon the Submittal with appropriate consideration given to operational, technical, cost, and management requirements. Evaluation of offers will be based upon each Proposer’s responsiveness to the RFQ, relevant experience to the tasks under this RFQ, and the hourly rates of staff that will provide services as part of this RFQ.

The following elements will be the primary considerations in evaluating all submitted Submittals and in the selection of a Proposer(s):

- A. Completion of all required responses in the correct format.
- B. Qualifications and experience with similar projects and clients.
- C. Key staff that will actually be working on the proposed tasks.
- D. The extent to which Proposer’s experience fulfills WRCOG-stated requirements as set forth in this RFQ.
- E. An assessment of the Proposer’s ability to deliver the indicated services in accordance with the specifications set out in this RFQ.
- F. The Proposer’s stability, experience, and record of past performance in delivering relevant services.
- G. Availability of sufficient high-quality personnel with the required skills and experience for the specific approach proposed.
- H. Overall cost of Proposer’s Submittal.

**13. SUBMITTAL INFORMATION, ORGANIZATION, AND CONTENT**

Proposer’s submittal in response to this RFQ will be incorporated into a final agreement between WRCOG and the selected Proposer(s). All Submittals shall contain, at a minimum, the following information:

- A. Title Page
- B. Table of Contents

- C. Cover Letter
- D. Firm Capabilities
- E. Key Staff Hourly Rates
- F. Appendix A: References
- G. Appendix B: Project Team Staffing
- H. Appendix C: Company Overview

The page limit for Items A - F is **20 double-sided pages (40 total pages)**. There is no page limit on appendices.

#### Title Page

The following must be provided on the title page:

- RFQ number
- Title of the project
- Name and address of proposing firms and/or individuals
- Phone and Fax of Proposer
- Primary contact person
- Email address of the primary contact person
- Signature of the individual authorized / obligated to commit the Proposer to this project.

#### Table of Contents

A clear identification of the materials by section and page numbers are to be included in the Table of Contents.

#### Cover Letter

The cover letter should be brief (two pages maximum) and outline the Proposer's qualifications and experience. In order to address the needs of this procurement, WRCOG will accept teams to propose in which proposing firms work cooperatively in presenting integrated solutions. Proposer's(s') team arrangements may be desirable in that they will enable the companies involved to complement each other's unique capabilities, while offering the best combination of performance, cost, and delivery for financial assistance being provided under this RFQ. WRCOG will recognize the integrity and validity of Proposer's(s') team arrangements provided that:

- The arrangements are clearly identified and relationships are fully disclosed; **and**
- A primary (lead) individual is designated who will be fully responsible for all contract performance.

#### Firm Capabilities

All Submittals must provide a comprehensive, yet concise description of the Proposer's(s') individuals' capabilities including the following:

- A. A track record of providing successful assistance on similar disciplines and tasks highlighted in Section 13.
- B. A track record of providing successful services to similar governmental entities.
- C. Descriptions of the key staff that will actually be working on the proposed tasks and their experience



working on similar issues.

- D. If responding as a firm, the ownership, size, and location of the office responsible for providing services to WRCOG.
- E. If responding as a firm, its legal organization (e.g., corporation, partnership) and year of incorporation.
- F. If responding as a firm, a description of the firm's equal employment opportunity and non-discrimination policies.
- G. If responding as firm, a summary of the firm's minority and female recruitment efforts and the percentage of minority and female officers, partners, or the equivalent.
- H. A statement, in one page or less, of any other relevant factors that should be considered by WRCOG in evaluating the Submittal.

Submittals will be evaluated by a Submittal Review Committee on the basis of the Proposer's(s') skills and experience, presentation and completeness of Submittal, hourly rates of staff that will provide services, and the ability and willingness to work with WRCOG, its management, and references.

Proposers to this RFQ should be mindful that WRCOG's selection process prioritizes experience, knowledge, and abilities of key individuals more so than experience associated with a particular firm. WRCOG has found that successful completion of a project is heavily reliant on the key staff that will be working with WRCOG on a regular basis.

### Understanding of the Services

A Regional Housing Trust is a new initiative for WRCOG so overall advisory services are sought. WRCOG is only interested in the experience that proposers have with the types of services and tasks listed below. Submittals should emphasize direct experience as this is something WRCOG values. WRCOG is releasing this RFQ to attain qualifications with firms that have direct experience in establishing Housing Trusts. Such experience must include, but is not limited to, the following services and tasks:

- The formation and operation of a Housing Trust
- Preparation of applications and Proposals to various private and public funding agencies for acquisition, predevelopment, construction and permanent financing
- Establishing relationships with the private sector to create and foster positive relationships along with Community Based Organizations (CBOs), city departments, residents, and elected officials and other stakeholders
- Effectively communicate with the business community, banking community, and neighborhood organizations in Western Riverside County
- Identifying projects and programs that provide homeless, extremely low, very low-, and low-income housing
- Representing organizations in local and regional partnerships
- Developing non-Trust sources of financial support for Trust operations, Trust supported projects, Trust formulated affordable housing policies, and endowments for the Housing Trust Fund.
- Providing technical assistance and expertise on affordable housing grant programs
- Representing organization with meeting attendance and presentations
- Development and monitoring of key performance indicators and metrics to measure impact and for sharing data related to funding options for revitalization projects and neighborhood demographics

**WRCOG is requesting that the response to this portion of the RFQ be limited to 20 double-sided**

**pages (40 total pages).** There is no page limit on appendices.

Submitter(s) shall:

- Provide a narrative, which addresses the Submitter's direct experience with the services listed above and shows understanding of WRCOG's needs and requirements.
- Sequentially outline the activities that would be undertaken to complete the formation of a Housing Trust and specify who would perform the tasks.
- Identify methods that consultant will use to ensure quality control as well as budget and schedule control for the project.
- Identify any special issues, problems, or risks that are likely to be encountered in this project and how the Proposer would propose to address them.

Also, please provide hourly billing rates for staff you are proposing to include on this RFQ for these services.

Appendix A: References

Please provide three (3) references, including names and contact information. References should not include any WRCOG staff or WRCOG Committee members.

Appendix B: Project Team Staffing

Please include biographies and relevant experience of key staff who would be assigned to the project. Please describe coverage levels of employees who would be assigned to this project. Affirm that no employees working on the engagement have ever been convicted of a felony.

Appendix C: Company Overview

Please provide the following for your company:

- Official registered name (Corporate, D.B.A., Partnership, etc.), Dun & Bradstreet Number, Primary and secondary SIC numbers, address, main telephone number, toll-free number(s), and fax number(s).
- Primary key contact name, title, address (if different from above address), direct telephone, and fax number(s).
- Person authorized to contractually bind the organization for any Submittal against this RFQ.
- Brief history, including year established and number of years the company has been offering streetlight and energy assistance and / or services.

**15. TERMS AND CONDITIONS**

Any Proposer or person submitting a Submittal shall state their willingness to agree to the following terms and conditions:

- A. The awardee must be fully committed to the mission of WRCOG.
- B. Termination - A termination agreement is to be negotiated between the parties that includes provisions on termination for cause and termination for convenience.
- C. Oral Presentations - Any individual or firm who submits a Submittal in response to this RFQ must be willing to make oral presentations related to contract-related activities at the request of the WRCOG Executive Committee or management.

## **16. WRCOG STANDARD PROFESSIONAL SERVICES AGREEMENT**

As WRCOG is only requesting qualifications from firms at this time, we are not requiring that firms enter into a Professional Services Agreement (PSA) at this time. If WRCOG elects to request a scope and budget from one or more of the firms submitting a Statement of Qualifications, those firms would be required to sign WRCOG's standard PSA. We are asking that proposer(s) identify in their Submittal any concerns or objections they would have with any of the PSA terms and conditions if selected for contract award. The agreement may be viewed on WRCOG's website at <http://www.wrcog.us/DocumentCenter/View/334/WRCOG-Professional-Services-Agreement-PDF?bidId>.

## **17. DISADVANTAGED BUSINESS ENTERPRISES (DBE)**

Though no DBE goal is set for this Project, WRCOG encourages participation from small and Disadvantaged Business Enterprises.

## Attachment A: Scoring Criteria

### Assistance with the Establishment of the Western Riverside Regional Housing Trust

Evaluation Criteria	Max. Possible Points
<p><u>TECHNICAL APPROACH</u></p> <ul style="list-style-type: none"> <li>• Tasks &amp; approach clearly described</li> <li>• Creative/innovative approach</li> <li>• Project intent has been met</li> </ul>	40
<p><u>CONSULTANT FIRMS</u></p> <p><u>Prime Consultant</u></p> <ul style="list-style-type: none"> <li>• Familiar with regional and local issues</li> <li>• Experience with similar projects of the same size and scope</li> </ul> <p><u>Sub-Consultants (if any)</u></p> <ul style="list-style-type: none"> <li>• Each sub provides unique service(s) to the team</li> <li>• Subs are fully capable of performing their tasks</li> </ul>	40
<p><u>PROJECT MANAGEMENT</u></p> <ul style="list-style-type: none"> <li>• Qualifications of key individuals</li> <li>• Time commitment of key individuals</li> </ul>	20
<p><u>REFERENCES</u></p> <ul style="list-style-type: none"> <li>• Similar projects completed</li> </ul>	Pass / Fail
<b>TOTAL</b>	<b>100</b>