



## Request for Proposal

for

### **Consulting Services and Technical Assistance for CDBG, HOME and IDIS HUD Programs**

**RFP: CmDv #1902**

Proposals Due by: May 31, 2019 @ 9:00 am (CDT)

Published date: May 5, 2019

Community Development Department  
Contact info: [cda@cityofalex.com](mailto:cda@cityofalex.com) or 318-449-5073

# Request for Proposal

## Consulting Services and Technical Assistance for CDBG, HOME, and IDIS HUD Programs

The City of Alexandria, Louisiana's Community Development Department (CmDv) is requesting proposals for professional consulting services and technical assistance for CDBG, HOME, and IDIS HUD Programs.

### Section 1 - Background:

CmDv's is an Entitlement Participation Jurisdiction and our program year begins on May 1<sup>st</sup> and ends on April 30<sup>th</sup>. CmDv's PY2019-2020 HUD funding amounts and activities consist of the list below. CmDv's established program guidelines for each activity can be found on CmDv's website at [www.cityofalexandrialala.com/community-development](http://www.cityofalexandrialala.com/community-development).

CDBG Activity	CDBG Activity Funding	HOME Activity	HOME Activity Funding
Demolition / Clearance	\$101,405	Major Rehab	\$160,380
Code Enforcement	\$4,500	CHDO-R	\$32,077
Minor Rehab	\$154,614	Planning & Admin	\$21,384
Program Delivery for Rehab	\$27,000		
Public Facilities	\$85,000		
Legal Succession Services	\$50,500		
Planning & Admin	\$84,500		
CDBG Total	\$422,519	HOME Total	\$213,841

In coming years, CmDv will be considering a program for the acquisition and new construction of single-family homes and/or multi-unit properties for rental/lease-purchase/homeownership in conjunction with Louisiana Housing Tax Credit program and/or other private leveraging. While CmDv's entitlement funding has been relatively low, CmDv anticipates a substantial collection of program income in the next few years.

### Section 2 - Statement of Needs / Scope of Work:

Compliance with Federal, State and local rules, regulations and laws is implied in all requested tasks listed below that may include, but not be limited to:

1. Provide staff with ongoing consulting, including technical assistance and programmatic advice, related to CmDv's management of the Community Development Block Grant (CDBG), HOME Investment Partnerships Program (HOME), Neighborhood Stabilization Program (NSP) and HUD's Integrated Disbursement Information System (IDIS). This may include remote and/or on-site training, participation in meetings/conference calls, emails correspondence, review of program or project specific documents, and miscellaneous Q&A related to program regulations, program income management, best practices, etc.

2. Assist staff in training, preparation, data entry, accomplishments and reports as required by HUD's Integrated Disbursement Information System (IDIS) related to all projects and activities. This may include review and assistance with the development of the Annual Action Plan (AAP), the Consolidated Annual Performance and Evaluation Report (CAPER) and/or any substantial amendments required to either plan, including the Five Year Consolidated Plan. This may include assessment and recommendation of best suited projects for the City each program year. Preferred certified IDIS Specialist.
3. Assist staff in training, project evaluation, data entry, mapping and reports as required by HUD's Integrated Disbursement Information System (IDIS) for HERO's. This may include analysis of the impacts of HUD assisted projects to ensure that the proposed project does not negatively impact the surrounding environment and that the property site itself will not have an adverse environmental or health effect on end users. Every project must also be in compliance with National Environmental Policy Act (NEPA), 24 CRF Part 50 and Part 58. This may also include tiered reviews, project specific reviews, Request for Release of Funds (RROF) and Notice of Funds Available (NOFA), etc procedures.
4. Assist staff in researching, application processing and grant award management for other HUD and non-HUD grant funding opportunities. This may include Emergency Shelter Grant (ESG), CDBG-Disaster Recovery (CDBG-DR), Federal Home Loan Bank (FHLB) and other grant funding sources.
5. Assist staff with financial and transactional management on all projects, regardless of funding sources. This may include programs such as Public Housing Capital, Operating Funds, Section 8, HOME, CDBG, NSP, Program Income, ESG, Brownfield Grants and FHLB. This may include application for additional grant resources, calculating HOME Match Liabilities, and the negotiation of collecting NSP repayments to be converted to CDBG Program Income (PI). This may also include working with the City's local Finance Department municipal accounting to reconcile accounting with HUD available funds.
6. Assist staff with oversight and coordination to provide regulatory and procedural guidance, data analysis, and assistance with working out troubled projects, regardless of funding source.
7. Assist staff in identifying and defining projects and activities that are most needed, impactful and effective for the City of Alexandria based on the capacity of the CmDv staff and the annual HUD funding awards, including non-HUD grant awards, subsidy layering, tax credits and/or program income secured during the program year. This may include community planning, housing development, economic development, public services, public education and grant administration.
8. Assist staff with the preparation and of development of new program designs, policies and procedures, documents, agreements and contracts, procurement, program forms, protocols, project files, reports, underwriting, financial structuring, record keeping and

monitoring procedures for all programs. Review and update of existing programs is also applicable. This service would be applicable to any funding source secured by CmDv.

9. Assist staff in review, selection and management of Developer, non-profits, CHDO's and/or sub-recipients for local registration/certification and funded projects. This may include certifying document submittals, review proposals for project RFP submittals, Housing Tax Credit layering, financials, invoicing, etc. This may also include training staff on the project selection process, including appropriate screening of projects based on eligibility and project readiness, understanding underwriting, developer capacity, market analysis, and other tasks, as necessary.
10. Assist staff in management and review of all documents submitted by sub-recipients / partners, who may be developers, non-profits, CHDO's, managers, tenants and property owners, in order to establish consistent procedures to facilitate compliance with all program or project-related reporting and recordkeeping requirements.
11. Assist staff with guidance and oversight of the management of land acquisitions, property adjudicated to the City and/or donated to a local Land Bank, where multiple funding sources may be utilized for a HUD funded project and/or activity.
12. Assist staff with compliance on lead and asbestos testing and/or abatement compliances during the scope of any applicable project.
13. Assist staff during local, state or federal program audits, including HUD's monitoring visits through preparation of HUD Exhibits prior to the visit and responses to any monitoring findings or concerns. Consultant shall advocate on CmDv's behalf to the maximum extent appropriate.
14. Assist staff with preparation for public hearings, public notices, conducting hearings, fair housing seminars, community outreach, administrative education / information, etc. This may include on-site visits to conduct these requested meetings.
15. Assist staff with ongoing project monitoring, documentation and program responsibilities for project with affordability periods and annual monitoring requirements.
16. Additional task orders may be requested by the City on an as needed basis to facilitate record-keeping allowing the City to distinguish between project-specific costs and general administrative costs.

### Section 3 - Proposal and Submission Requirements:

Complete bid packet / bid specifications may be obtained at the City of Alexandria's website, [www.cityofalexandriala.com](http://www.cityofalexandriala.com), under the heading "Business", and drop down to "RFP/RFQ/Bids". There is no charge to download bid documents from the City's website.

Sealed bids must be received by the Secretary of the Community Development Department, by 9:00 am, (CDT) on Friday, May 31, 2019.

Responses to this Request for Proposals (RFP) shall be submitted in a sealed envelope containing one (1) original written copy. The envelope must be plainly marked on the outside as "*Proposal for Consulting Services and Technical Assistance*".

Postal mail submittals shall be addressed to:	Physical delivery submittals shall be addressed to:	Electronic Bid submittals shall be addressed to:
City of Alexandria	City of Alexandria	<a href="http://www.centralauctionhouse.com">www.centralauctionhouse.com</a>
Community Development Department	Community Development Department	
Attn: Yvette Botts	Attn: Yvette Botts	
PO Box 71	625 Murray Street, Third Floor	
Alexandria, LA 71309	Alexandria, LA 71301	
Phone: 318-473-5073	Phone: 318-473-5073	Phone: 225-810-4814

Pursuant to Louisiana R.S. 38:2212 B.(6)(a) through E. (1-7) and R.S. 38:2212.1 B.(4)(a), vendors / contractors have the option to submit their bids and bid bonds electronically. Bids and bonds to be filed electronically shall be posted with Central Bidding at [www.centralauctionhouse.com](http://www.centralauctionhouse.com) (phone: 1-225-810-4814). Registration will need to be completed prior to posting of bid.

Each proposal shall provide a straightforward, concise description of the responder's capabilities to satisfy the requirements of this RFP. Emphasis should be on completeness and clarity of content. If a responder so wishes, the proposal may be accompanied with brochures, promotional materials, or displays properly identified. Literature, brochures, and other related paperwork attached to the bid should be identified with the name of the bidder and RFP number.

Out of state corporations and/or limited liability companies shall furnish a certificate of registration to transact business in the State of Louisiana prior to signing of a contract with the City of Alexandria.

Any questions or comments concerning the RFP must be submitted in writing to Shirley Branham, CmDv Administrator, [shirley.branham@cityofalex.com](mailto:shirley.branham@cityofalex.com) and copied to Yvette Botts, CmDv Admin Secretary, [yvette.botts@cityofalex.com](mailto:yvette.botts@cityofalex.com) no later than Friday, May 17, 2019 at noon (CDT). Clarifications and/or amendments will be posted by Friday, May 24, 2019 at noon (CDT). These clarifications, if any, shall be incorporated into any bid proposals submitted. No questions, comments or instructions will be taken or given via telephone.

The CmDv reserves the right to reject any and all bids or parts of bids, or accept bids most beneficial to the City. Conditional proposals, or those which take exception to the specifications, will be considered non-responsive and will be rejected.

Costs for the awarded consulting services and technical assistance defined by this RFP will be paid for with federal money that the City of Alexandria receives from HUD.

#### Section 4 – Contract Term:

Any contract resulting from this RFP will be for a two (2) year term, then thereafter renewable annually for a total of up to three (3) additional years, at the option of the City.

#### Section 5 - Proposal Format:

1. Title Page – Show the RFP subject, the name of your firm, address, telephone number, name of contact person, email address, and date.
2. The proposal shall include an original proposal transmittal letter signed in ink by a representative authorized to contractually bind their firm to the proposal.
3. Company Profile –
  - a. State whether the responder is national, regional, or local;
  - b. State the location of the office from which the services will be provided when not provided on-site;
  - c. Provide a representative list of current and prior clients, including a contact person's name and telephone number, for whom such services have been provided, as references.
  - d. Provide work experience with CmDv, if applicable.
4. Summary of Qualifications – Identify each person who will be involved in the provision of services described herein. Describe each person's qualifications, including relevant experience and education/training in CDBG, HOME and IDIS program management for participating jurisdictions, including number of years engaged in each type of work. Expertise with HUD's 2013 HOME Final Rule is required. Reserve the right to transfer hours among assigned staff based on workload and needs of the project when a task is within an approved maximum budget.
5. Litigation – State whether the responder has been involved in litigation within the last five years or if there is any pending litigation in any way arising out of the performance or delivery of services similar to those described herein. If so, provide a brief explanation of the issues involved and the outcome, if resolved.

6. Statement of Needs – Please restate each requirement and discuss whether or not the responder can provide the described services, how the requirement will be met or the extent to which responder can meet the requirement.
  
7. Availability – Provide a statement of when the responder will be ready, willing and able to provide the services in accordance with this RFP and in accordance with respondent’s proposal, if selected. This shall include a statement of expected response time to a task order request.
  
8. Fees – provide a schedule of services based on items #a through e below. Due to the nature of this service, this will not be a fixed price contract. Time shall be tracked in ten (10) minute increments.
  - a. Provide detailed proposed fee structure, including hourly rate for each team member and their title as defined in Exhibit B. Projected hours listed are for pricing comparisons only and are no guarantee of time commitments.
  - b. Standard General & Administrative (G&A) rate for other direct & indirect costs within HUD-approved rate.
  - c. Standard profit margin for other direct costs within HUD-approved rate.
  - d. Indicate other typical expenses that may be requested for reimbursement such as meal per diems, maximum hotel per night cap, maximum vehicle rental per day cap, for travel requirements.
  
9. MWBE / Section 3 – Provide statement if Minority and/or Women Owned Business Enterprise and/or Section 3 Business.

**Section 6 - Evaluation Criteria:**

All responses to the proposal will be evaluated according to the following criteria and corresponding point system. The proposal will be evaluated on the basis of written materials. Sufficient information must be included in the proposal to assure that the correct number of points is assigned. Incomplete or incorrect information may result in a lower score.

Item	Evaluation Score Methodology	Scoring Point Breakdown	Max Points Available
1	Availability and commitment of responder to provide the services immediately and expeditiously, as required within the two-year initial timeframe.	0-20	20
2	Experience and qualifications specifically with City of Alexandria’s CmDv as involved in the CDBG, HOME and IDIS program services during the past 5 years and quality of relationship. Bidders will be ranked in order from best relationship to unsatisfactory. Bidder deemed best relationship will receive the	0-20	20

	maximum point score. Each succeeding bidder will receive a score in decreasing points. Ranked as: Unsatisfactory or no relationship; Satisfactory relationship; Outstanding relationship.		
3	Responder's approach, plan of work, recommended schedules, and overall understanding of CmDv's needs.	0-15	15
4	Volume of contractual jurisdiction references provided by the responder as involved in the CDBG, HOME and IDIS program services during the past 5 years. Bidders will be ranked in order from most qualified to least qualified. Bidder deemed most qualified will receive the maximum point score. Each succeeding bidder will receive a score in decreasing points. Ranked as: No jurisdiction previous experience; Under contract with 1-15 jurisdictions; Under contract with more than 15 jurisdictions.	0-15	15
5	Contractual jurisdiction references demonstrating a thorough understanding of requirements and regulations governing the CDBG, HOME and IDIS programs and recommendation for re-hire. Bidders will be ranked in order from highest referral to lowest. Bidder deemed highest referral will receive the maximum point score. Each succeeding bidder will receive a score in decreasing points. Ranked as: Unsatisfactory; Satisfactory; Outstanding	0-10	10
6	Cost Competitiveness: A hypothetical estimate of work hours and job classifications has been developed and is shown on Exhibit B – Price Proposal. Each responder shall complete the Exhibit by inserting hourly billing rates and associated costs and include the completed form with their Proposal. The responder's rates shall be the contractual rate if award is granted. Bidders will be ranked in order from lowest price to highest. Bidder deemed most economical will receive the maximum point score. Each succeeding bidder will receive a score in decreasing points. Ranked as: Most economical; customary; most expensive	0-10	10
7	Consultant / Firm serves as a subject matter expert / lead trainer for HUD sponsored workshops and training events for more than 2 years.		5
8	MWBE & Section 3		5
		TOTAL	100

NOTE: The City of Alexandria does not discriminate on the basis of race, color, national or ethnic origin, age, religion, disability, sex, or any other characteristic protected under applicable federal or state law and is an equal opportunity employer.



## Section 7 – General Conditions:

1. Consulting services and technical assistance shall begin with an Ordinance approved by City Council authorizing the City to enter a Professional Services Agreement (PSA) with the awarded bidder. Standard disclosures shall apply to this RFP and shall be added to awarded contracts.
2. The City will designate a point of contact responsible for formally requesting any type of assistance / task order from awarded bidder.
3. Awarded bidder will assign appropriate staff based on technical expertise and availability to each specific request.
4. Proposals submitted after the time and date specified in this RFP will not be considered.
5. CmDv reserves the right to select the most responsive, favorable overall proposal, as determined by the CmDv using the proposed point system in its sole discretion, and may be awarded to a firm other than the lowest bidder. Price will be considered, but need not be the sole determining factor. CmDv also reserves the right to request clarification of information submitted, to request additional information from any and/or all applicants, and to waive any irregularity in the proposal and review as long as CmDv procedures remain consistent with procurement requirements.
6. CmDv further reserves the right to reject any and all proposals. In the event CmDv does not find any proposals submitted in response to this RFP acceptable, it may reject all proposals and at its discretion re-open the proposal process to invite additional firms to submit proposals.
7. All materials submitted in response to this RFP become the property of the CmDv and will be returned only at the option of CmDv. CmDv reserves the right to use any or all ideas presented in any response to the RFP, and selection or rejection of the proposal does not affect this right.
8. After the initial review of proposals, CmDv may invite representatives of firms responding to this RFP to discuss the proposal with the City's key personnel and/or Administration that would be engaged in the provision of services. Such interviews will be conducted for fact finding and explanation purposes. These may be in-person or electronic interviews. CmDv will not be liable for expenses incurred in attending any such interview.
9. CmDv will conduct contract negotiations with the firm whose proposal is deemed most responsive to CmDv's needs based on the results of the proposed point system. Until CmDv acts formally to approve a contract, and until such contract is signed by both parties, CmDv is not legally obligated in any respect.
10. The successful responder must maintain all licenses, permits, and other authorizations necessary to provide the needed services as required by federal, state, or local laws.

11. A Certificate of Insurance evidencing the minimum requirements set out in Exhibit A must be provided to and accepted by CmDv prior to commencement of any work.
12. The successful responder will be required to indemnify, defend and hold the City, its officers and employees harmless from and against all losses, claims, suits, or judgments, including payment of attorneys' fees and costs, incurred or asserted against the City as a result of or arising from the firm's negligent acts or omissions. This provision of a contract resulting from this RFP will survive the expiration or termination of the contract.
13. The City of Alexandria shall schedule for payment the invoices for services under this bid within thirty (30) business days after due and accompanied by invoice.
14. The City of Alexandria is exempt from all taxes. This shall apply to any reimbursement requests for travel expenses associated to a task order. A tax exempt form shall be furnished by the City of Alexandria Purchasing Department, if requested.
15. Participating bidders can expect to receive a copy of the Bid Tabulations Sheet Notification, via email, within fifteen (15) business days after bid opening to identify the awarded bidder.
16. Any bid price submitted must be honored by the bidder for sixty (60) business days after the bid opening date. This is to provide a pool of alternate bid prices for a secondary / subsequent award consideration, in the event the initial bid award is declined. Any secondary / subsequent bidder may also elect to request a Bid Withdrawal at any time during the sixty (60) days.
17. Whenever quantities or usages are provided by the work descriptions, these quantities are estimates only. No guarantee or warranty is given or implied by the City of Alexandria as to the total amount that may or may not be required to complete the work. These estimated numbers may be used to calculate total bid prices.
18. Bidders warrant and covenant that no official or employee of the City, or any business entity in which an official of the City has an interest, has been employed or retained to solicit or aid in the procuring of the contract of this project.
19. Agree by document signature to show a good faith effort to comply with the City's AFEAT (Alexandria Fairness, Equality, Accessibility, and Teamwork) Program. Participation by minority and/or disadvantaged business enterprise firms is encouraged. For more information on AFEAT and the City of Alexandria's Diversity in Action Initiative, and to explore a local and statewide directory of minority businesses, please visit [www.diversityinaction.org](http://www.diversityinaction.org). The AFEAT Program should be inquired about through the City's Legal Division (318-449-5015).

20. Agree by document signature to show a good faith effort to comply with the City's Non-Discrimination Statement. The Non-Discrimination Program should be inquired about through the City's Legal Division (318-449-5015). Furthermore, Contractor shall acknowledge that all contracts shall contain provisions requiring compliance with E.O. 11246, "Equal Employment Opportunity," as amended by E.O. 11375, "Amending Executive Order 11236 Relating to Equal Employment Opportunity," and as supplemented by regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.
  
21. Confirm by written proof that they are not listed as an EPLS (Excluded Parties List System) on the Federal Government's SAM's (System for Award Management) website at [www.sam.gov/portal/sam](http://www.sam.gov/portal/sam). Any bidder that is found listed on SAM's in violation shall automatically be rejected from bidding privileges, CmDv Qualified Contractor Registration and/or bid award, by Category and/or in its entirety.

**Section 8 – Proposal Checklist:**

The following checklist is provided as assistance to the development and organization of the RFP response. It in no way supersedes or replaces the requirements of the RFP. Please initial the lines below for each document / section attesting to the fact that you have read and/or included the documents in your RFP response.

Title Page with Firms Contact Information	_____
Signed Proposal binding to Scope of Work	_____
Company Profile	_____
Summary of Qualifications of Staff & Experience	_____
Summary of Litigation	_____
Statement of Needs to Scope of Work	_____
Availability to Perform Services	_____
Itemized Fee Schedule	_____
Acknowledgement of Evaluation Score Methodology	_____
Confirmation of MWBE and/or Section 3 Qualification	_____
Acknowledgement of Addendum, if applicable	_____
Certificate(s) of Insurance, Exhibit A	_____
Cost itemization for services scenario, Exhibit B	_____

# Request for Proposal

## Consulting Services and Technical Assistance for CDBG, HOME, and IDIS HUD Programs

### Exhibit A - Insurance Requirements:

The awarded bidder shall obtain at its own expense, and maintain in full force and effect during the term of any contract resulting from this RFP, a policy or policies of insurance, issued by an insurance company or companies licensed to conduct business in the State of Louisiana and having a minimum A.M. Best rating of "A-VII", providing the following coverages and containing coverage limits not less than the following:

- a. Commercial General Liability (public liability including premises, products and completed operations). Such policy shall name the City of Alexandria, its officers and employees, as additional insured.

Bodily injury and property damage combined:

\$1,000,000 per occurrence

\$1,000,000 aggregate

- b. Automobile Liability (including owned, non-owned and hired vehicles)

Bodily injury and property damage combined:

\$1,000,000 per accident

- c. Workers' Compensation and Employers Liability

Part One: Benefits as required by Louisiana law

Part Two: \$1,000,000 per accident

\$1,000,000 each employee

\$1,000,000 policy limit

All such policies shall contain an endorsement requiring the insurer to provide thirty (30) business days notice to CmDv prior to the cancellation thereof.

The awarded bidder shall provide the City a certificate of insurance prior to commencement of the work.

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## Consulting Services and Technical Assistance for CDBG, HOME, and IDIS HUD Programs

Exhibit B - Price Proposal Scenario:

Name of Firm: \_\_\_\_\_

CmDv has developed the following estimate of hours by classification for use in comparing the price component of each respondent's proposal. These estimates in no way bind the City or CmDv as a commitment of hours or expenses to be expected. It is for comparative price review only.

Please complete the worksheet by entering responder's contractual hourly billing rate for each job classification and contractual reimbursable expense rate and attach to your proposal package. The responder's rates provided will be their contractual rate for services award contracts.

Job Classification	Estimated # of Hours Required	Hourly Billing Rate*	Estimated Expense
Executive Owner / Principal Consultant	35		
Senior CDBG / HOME Consultant	175		
Associate CDBG / HOME Consultant	60		
Certified IDIS Specialist / Senior IDIS Consultant	85		
Associate IDIS Associate Consultant	40		
Airfare for on-site training	Round Trip		
Car Rental for on-site training	3 days		
Hotel for on-site training	3 nights		
Meal Per Diems for 3 meals daily x # of days	3 days		
General & Administrative (G&A) Rate	%		
Profit Margin Percentage	%		
<b>TOTAL COST TO CmDv</b>			

\* Hourly billing rates and reimbursable expenses are inclusive of all expenses and overtime charges.  
 Senior Consultants must possess 10 + years of experience.  
 Associate Consultants must possess 1-9 years of experience.