

SONOMA COUNTY COMMUNITY DEVELOPMENT COMMISSION

REQUEST FOR PROPOSALS (RFP)

for

PROFESSIONAL SERVICES FOR THE DEVELOPMENT AND SUBMITTAL OF FIVE-YEAR CONSOLIDATED PLAN, INCLUDING FIRST-YEAR ACTION PLAN

INTRODUCTION

The Sonoma County Community Development Commission (“Commission”) is requesting proposals from experienced community development consultant firms or individual consultants to assist the Commission in the preparation of the Sonoma County (“County”) 5-year Consolidated Plan (“Con Plan”) for Fiscal Years (FY) 2025-2030 and the Annual Action Plan for FY 2025-2026 pursuant to 24 CFR Part 91, per the IDIS Consolidated Plan Template, as necessary to receive direct allocations of Community Development Block Grant (CDBG), HOME Investment Partnership (HOME) and Emergency Solutions Grant (ESG) funds from the U.S. Department of Housing and Urban Development (HUD).

BACKGROUND

The Commission administers the CDBG, HOME and ESG programs on behalf of the HUD-designated Urban County entitlement jurisdiction, consisting of the County of Sonoma, the Town of Windsor, and the cities of Cloverdale, Cotati, Healdsburg, Rohnert Park, Sebastopol, and Sonoma. The County is currently in the final year of the current 5-year Con Plan period (FY2020-2025). During the previous 5-Year Con Plan period, the County funded multiple public service organizations, affordable housing development projects, housing rehabilitation programs, accessibility barrier removal projects, tenant based rental assistance programs, micro-enterprise programs and grant planning and administration activities.

Sonoma County is a large, urban-rural county encompassing 1,575 square miles located north of San Francisco, California. Sonoma County has an estimated population of 482,000 that reside within nine cities and a large unincorporated area, including many geographically isolated communities. Most of the county’s population resides within its cities, the largest of which are clustered along the Highway 101 corridor. The County’s median household income for a household of four persons is approximately \$128,400.

CONSOLIDATED PLAN

The 5-Year Con Plan and first year Action Plan will address long and short-range plans to identify goals and objectives, gaps in services, areas of need, resources, housing, homelessness, improved collaboration and public input process, programs and projects, and other areas as may be identified to assist the County in implementing the CDBG, HOME and ESG programs.

The selected consultant may also assist in the preparation and facilitation of a community and stakeholder participation process. The selected consultant will perform professional services under the supervision of the Commission’s Community Development Division. The Con Plan will

cover the five-year period from September 1, 2025, through August 31, 2030. The Con Plan also includes a FY 2025 Annual Action Plan.

Assessment of Fair Housing

A regional Assessment of Fair Housing was completed in 2024 and will not be required to be updated for the submission. However, HUD requires comments concerning the existing assessment and the selected consultant will need to ensure that those comments meet HUD's expectations.

DELIVERABLES/SCOPE OF WORK

The consultant selected will prepare the Con Plan and a FY 2025 Annual Action Plan pursuant to all current federal laws, regulations, and guidelines and must be fully compliant with the requirements of the Housing and Community Development Act of 1974, as amended, and the National Affordable Housing Act of 1990, as amended.

The required work is outlined, but not limited to documents entitled, "Guidelines for Preparing a Consolidated Plan Submission for Local Jurisdictions", are available on the HUD website at the following links:

- <https://www.hudexchange.info/programs/consolidated-plan/consolidated-plan-process-grant-programs-and-related-hud-programs>
- <https://www.hudexchange.info/programs/consolidated-plan/>
- https://www.hudexchange.info/resources/documents/24CFRPart91_11.21.11.pdf
- <https://www.hud.gov/sites/documents/FHPG.PDF>
- <https://www.hudexchange.info/programs/affh/>

The consultant selected will review and tabulate data and information supplied by the County, HUD, the U.S. Census Bureau, sub-recipients, other applicable resources and input from citizens and key stakeholders to complete the required Con Plan components per the HUD regulations. A consultant will be selected to prepare and assist with the submittal in the format and form as required by HUD. The following strategic planning documents are required to receive a direct allocation of CDBG, HOME, and ESG funds:

- 5 Year Consolidated Plan
- Annual Action Plan
- Update of the Citizen Participation Plan as needed

Consolidated Plan, Action Plan and Citizen Participation Plan

The scope of work to be performed by the consultant for each plan is as follows:

- Develop 5-Year Con Plan and the required Annual Action Plan for the 2025-2026 program year in accordance with HUD requirements.

- Prepare a Con Plan in accordance with Chapter 24 of the Code of Federal Regulations (CFR) Part 91, and which addresses 25 CFR Part 570 and other applicable federal regulations and current requirements.
- Perform relevant consultations and data collection to complete the required HUD tables and the analysis of housing and non-housing needs.
- Prepare an Executive Summary for the Con Plan and Action Plan.
- Preparation of a multi-lingual (English, Spanish) community questionnaire that to be posted on the County's website and with paper copies distributed at key community locations such as libraries (the Commission will provide the Spanish translation).
- Assist Commission staff to assess the existing community need as necessary to develop new strategies, goals, and priorities.
- Assist Commission staff with development of new strategies, objectives, priorities, and programs for inclusion in the Con Plan and Action Plan.
- Develop and incorporate a performance measure component as required by HUD regulations.
- Prepare draft multi-lingual (English, Spanish) public hearing notices and other public notices as may be applicable (the Commission will provide the Spanish translation).
- Conduct and synthesize the results of consultations with private agencies, public agencies and community groups as required.
- Assist Commission staff with the review of the current Citizen Participation Plan to determine whether any changes are needed in order to meet HUD's current requirements.
- Provide a shared drive with electronic copies of the documents - to include, at a minimum, a list of data sources, copy of data collected, consultations, records, and other supporting documentations used to develop the Con Plan, Annual Action Plan, and Citizen Participation Plan.

The Consultant selected will be required to work with the HUD format as noted herein, but also be able to provide a less technical format or approach when engaging in the citizen participation process. See 24 CFR 570.200 and 24 CFR Part 91.

The required Con Plan must follow any and all amendments and updates, such as utilizing the HUD's Office of Community Planning and Development (CPD) eCon Planning Suite, including the Consolidated Plan template in IDIS Online and the CPD Maps website. The eCon Planning Suite is designed to support grantees and the public to assess their needs and make strategic investment decisions by providing better data and tools and by creating a seamless planning and grants management framework. Overview information is available at <https://www.hudexchange.info/programs/consolidated-plan/>

CONSOLIDATED PLAN COMPONENTS

The Con Plan includes several sections including, but is not limited to:

1.1. Consultation

- 1.2. Updated Citizen Participation Plan and Process
- 1.3. General: A complete Consolidated Plan consists of information required in 24 CFR 91.200 through 24 CFR 91.230
- 1.4. Housing and Homeless Needs Assessment 24 CFR 91.205
- 1.5. Housing Market Analysis; 24 CFR 91.210
 - 1.5.1. Socioeconomic Trends
 - 1.5.2. Housing Trends
 - 1.5.3. Supply
 - 1.5.4. Condition of Housing
 - 1.5.5. Cost of Housing
 - 1.5.6. Lead-Based Paint Needs
 - 1.5.7. Any other topic relevant to housing market analysis
- 1.6. Five-Year Strategic Plan 24 CFR 91.215
 - 1.6.1. Strategies and priority needs and objectives;
 - 1.6.1.1. Area-targeted Implementation Plan (if applicable)
 - 1.6.2. Community Development Needs Assessment
 - 1.6.3. Neighborhood Revitalization
 - 1.6.4. Job Training & Creation
 - 1.6.5. Public Service, Health, Youth Needs, Senior, Homelessness
 - 1.6.6. ADA Accessibility
 - 1.6.7. Affordable Housing
 - 1.6.8. Public Housing
 - 1.6.9. Homelessness, including needs, facilities, and services
 - 1.6.10. Non-Housing Community Development Plan
 - 1.6.11. Lead Pain Hazard Reduction Strategy
 - 1.6.12. Anti-poverty strategy
 - 1.6.13. Institutional structure
 - 1.6.14. Coordination
 - 1.6.15. Broadband and Resiliency Requirements are now required for all consolidated plans submitted on or after January 1, 2018.
 - 1.6.15.1. Annual Action Plans are not impacted.
 - 1.6.15.2. As per HUD Grantees (Sonoma County), submitting new Con Plan must consult and encourage participation in the development of the Con Plan with four additional stakeholder categories.
 - 1.6.15.3. For broadband: public and private organizations, including broadband internet service providers, and organizations engaged in narrowing the digital divide.
 - 1.6.15.4. For resilience: agencies whose primary responsibilities include the management of flood prone areas, public land, or water resources, and emergency management agencies.
 - 1.6.15.5. The County must also include a description of broadband needs and vulnerability to natural hazard risks in its housing market analysis.
- 1.7. Action Plan: 24 CFR 91.220
 - 1.7.1. The Action Plan serves as the planning document for addressing overall community development and housing needs, utilizing the entitlement of CDBG, HOME

and ESG funding available to the County for the 2025-2026 year. Projects selected to receive this funding will be included in the Annual Action Plan.

1.8. Certifications; and

1.9. Monitoring

1.9.1. Public and Assisted Housing Needs, Special Population Needs.

CONSULTANT PRESENTATIONS/FACILITATED SESSIONS

Implementation of the Citizen Participation Plan for the development of the Con Plan is required (some meetings can be held virtually.)

Consultant shall review and update the County's list of identified potential groups to consult with including, but not limited to community leaders, representatives, and advocates from a cross-section of the community including community-based organizations, service providers for the homeless and disabled, public housing residents, businesses, economic development interests, County, and other governmental departments and other entities as required by HUD Con Plan 24 CFR 91.

Forums: Consultant shall facilitate at least two (2) forums in the endeavor of gathering information (i.e., soliciting input on housing and community development needs) and providing feedback on the draft Con Plan, which meet HUD's requirements.

Survey(s): The Consultant will create and distribute a survey in English and Spanish to identify and prioritize the community's housing and non-housing needs for the next five (5) years.

- The survey will include dissemination to public housing sites, non-profit agencies, housing and service providers, local businesses, lenders, realtors, school district, health industry, homeless advocates and other agencies as required by HUD regulations.
- The survey will include the residents attending the community forum meetings.
- Additional notation - The Commission will post the survey(s) on the County's website in addition to the methods used by the consultant. Methods shall be addressed in the proposal submission.
- The consultant will also be responsible for the following tasks involved – assessing and analyzing the survey results and including them in the Con Plan sections as required, including tables or matrices: The consultant shall include narratives in the Con Plan's need assessment sections describing the survey results.

Presentations/Facilitated Sessions: Presentations are required at community and public meetings and moderation of discussions and will include:

- Minimum of two (2) evening and one (1) day neighborhood community meetings.
- Minimum of two (2) Public (Community Development Commission and Cities and Towns Advisory Committee) meetings (identifying needs; and draft/final approval of the Con Plan).

- Minimum of five (5) interviews with community stakeholders to be determined with the Commission staff and Consultant, but at a minimum should include representatives from County departments utilizing CDBG funds.
- The Consultant will be responsible for preparing agendas, handouts, surveys, and other presentation materials as appropriate as well as maintain notes and results of each public meeting.

ADDITIONAL RESPONSIBILITIES

The Consultant will collaborate with the Commission’s Community Development Division to complete a HUD approved Consolidated Plan and FY2025-26 Annual Action Plan.

Project Milestones: a timeline for project milestones including proposed community meetings, surveys, and stakeholder interviews is required- continuing through to HUD approval of the Plans.

Draft and Final Product: Consultant will produce thorough and complete documents that consolidate all elements in a format and organizational structure that meets all federal regulations, guidelines, and notifications for submittal to HUD, including:

- Developing and preparing the Con Plan and FY2025-26 Annual Action Plan in draft form as well as final form for the County to submit electronically to HUD in the eCon Planning Suite after County review and authorization; and
- Preparing maps, tables, charts, illustrations, and photographs to include in the Con Plan and FY2025-26 Annual Action Plan, as needed.
- The draft and final Con Plan and FY2025-26 Annual Action Plan must also be in a PDF document that is easily readable by the public as it is understood by the eCon Planning Suite version, while meeting HUD submission requirements, is not the best document to display or print for public review.
- Submitting the final form Con Plan and FY2025-26 Annual Action Plan to the County for submission to HUD.
- Consultant shall provide all documentation of information gathered for the Con Plan and FY2025-26 Annual Action Plan, including word version, excel, table, etc., and the methodology used, a list of individuals and groups participating in the development of the Con Plan and FY2025-26 Annual Action Plan, and a record of outreach consultation/input activities conducted, and comments received.
- Consultant shall provide one hard copy of the final Con Plan report and FY2025-26 Annual Action Plan and one digital copy.
- Consultant shall also assist in making any revisions required by HUD after submission of the Con Plan and FY2025-26 Annual Action Plan; and
- Troubleshooting with County staff, and if applicable, with HUD relative to using IDIS/eCon Planning Suite software.

PROPOSAL CONTENT

The following information should be provided in the Proposal:

Summarize your approach and understanding of the project and any special considerations of which the County should be aware. Indicate clearly, the levels of participation you will expect from Commission staff in the fulfillment of the contract. The contents of this section shall be determined by the proposer but should demonstrate an understanding of the special characteristics of the project.

This section shall outline the proposed approach to the project. This approach or scope of work shall include:

- **COVER/SUMMARY**
 - o Cover Letter/Executive Summary – include highlights of the proposal, signed by an individual(s) with the authority to enter into any contract, which results from this RFP.

- **EXPERIENCE AND QUALIFICATIONS OF FIRM:**
 - o Company name, address, telephone, company’s history and mission statement; the history of the organization shall include any former name(s) of Offeror, number of years of operation and number of years Offeror has been involved in producing Con Plan research documents and or comparable documents.

 - o The Proposer must include a description of any MBE, WBE, DBE or other certifications Offerors may have, including Section 3 Business.

- **EXPERIENCE & QUALIFICATIONS OF PERSONNEL:**
 - o Include the name, title, address, telephone number, and resume of the Offeror’s project manager and team members. It must include a commitment concerning the availability of the project manager and identified team members. Credentials are subject to verification.

- **WORK PLAN & SCHEDULE:**
 - o Present high-level workstreams as well as detailed action steps (task(s)), including approach and services to be provided consistent with the Scope of Work provided in the RFP.
 - o Proposed time schedule for the Con Plan and review of the County’s existing Plans, including target dates for public participation (Includes Forum, survey, meeting schedules).

- Exceptions to the requirements of the RFP should be clearly delineated in this section.
- In addition, you are invited to include a maximum of two (2) pages of information not included or requested in this RFP, if you feel it may be useful and applicable to this project.

- Required forms referenced, attachments referenced within the RFP, including any addenda (if any).
- Detailed Cost of Services

STAFF QUALIFICATIONS AND RELATED EXPERIENCE

The Commission is especially interested in your firm’s familiarity and prior/current experience (recent) with housing issues, CDBG, HOME and ESG rules and regulations as it relates to Con Plan development and its processes. Qualifications and preferences include but are not limited to analyzing Needs Assessment, Market Survey’s, preparing maps and tables; ability to develop Con Plans, availability and commitment to attend all required meetings and meet all deadlines, proficiency in using a computer with Microsoft Word, Excel, Adobe Acrobat/Reader, Internet browser, email, and other database software; creating and collecting data on surveys.

If your firm intends to subcontract any of the services required under this RFP it should be discussed in the relevant section. Detailed information for each subcontractor must be provided. Consultant must also provide proof that subcontractor(s) is licensed, insured, etc. Note: No work may be subcontracted, nor assigned, without prior written approval of the Commission.

Related Experience and References

Include descriptive information concerning the experience of the firm. Include information about previous projects (preferably Con Plan) or projects that might be comparable, including the size and type of projects and the scope of services provided. Provide the following information:

- References for at least three (3) most comparable projects for which your firm has provided, or currently is providing, similar services.
- List the projects in reverse chronological order and provide the following information for each project:
 - Name of the agency/company name, address.
 - Name of contact person and telephone number (contact person, who, at the time of RFP submittal, will be employed by the owner).
 - Type or name of project/plan.
 - Brief description.
 - Your firm’s specific involvement (i.e., consultant, sub-consultant, etc.).
- Status of completion.

PROPOSED FEE STRUCTURE AND SCHEDULE

Provide proposed fees, cost information, and recommend a budget plan for all services to be provided in the following format:

- Proposers should review the requirements of this RFP and address all services in this fee schedule that might reasonably be expected to support the project. Indicate how the Commission will be invoiced for services, i.e., by task completed. This information should be detailed and broken down by type of service and units of work or other applicable measure.

Proposers should endeavor to provide a comprehensive, fee schedule, as the Commission will not include compensation in the contract for items not addressed.

- Include a total cost to provide services, based on the consultant's fee schedule and the scope of work as outlined in this RFP. This cost will be used as a basis for negotiations.
- The fee proposal submitted, along with the proposed project approach, will be used as a basis for any contract negotiations. The actual scope of services and fees included in the contract may be negotiated and may vary to satisfy the County's actual needs.

CONFLICT OF INTEREST

- Disclose any financial, business or other relationship with the County or Commission or any member of the County or Commission staff that may have an impact on the outcome of the project.
- List current clients who may have a financial interest in the outcome of the project.
- Time is of the essence, and the consultant must be able to adhere to a timeline that will meet the County's deadline to submit the required documents to HUD in mid-July 2025, but no less than 45 days prior to start of County's Fiscal Year, September 1, 2025. The Consultant will be required to identify the exact submittal date, submit a progress/milestone schedule per the Project's Scope of Work, and coordinate its submittal to HUD with Commission staff.

TENTATIVE SCHEDULE

- RFP Issued: January 31, 2025
- Proposal Due Date: February 14, 2025
- Interviews: February 20-21, 2025
- Award of Contract: February 25, 2025
- Contract Execution: March 3, 2025
- Project Start Date: March 3, 2025
- Project Completion: Submittal of Documents to HUD no later than July 16, 2025 (mandatory)

DOCUMENT SUBMITTALS

- To be considered, please submit electronic/digital copy of the proposal as a PDF.
- All proposals must be received by Rhonda.Coffman@sonoma-county.org, no later than:
Friday, February 14, 2025
*****no later than 4:00p.m.*****
- Proposals received after the due date/time will not be considered.
- Questions/clarification regarding anything in this document should be addressed in writing to Rhonda Coffman by email at Rhonda.Coffman@sonoma-county.org.

EVALUATION CRITERIA

The Commission will consider all proposals and award a contract to the Consultant that provides the best overall value for the County and Commission. In determining which proposal offers the

best value, all of the following factors will be considered, no one of which shall more weight than the other:

- Experience with preparing and submitting successful Consolidated Plans and other required documents.
- Relevant qualifications of personnel.
- Information obtained via reference checks and from other sources regarding a firm's experience and reputation.
- Familiarity with applicable local, state, and federal laws.
- Knowledge of or ability to acquire knowledge of local issues and interested parties in Sonoma County.
- Approach to public outreach.
- Approach to overall preparation of the required documents as required by HUD.
- Proposed schedule/timeline and ability to meet County and HUD deadlines (mandatory).
- Overall responsiveness to this RFP and ability to satisfy HUD's submittal deadlines and requirements and the baseline requirements of the RFP.
- Cost of the services.

A materially incomplete or non-responsive proposal will be rejected. Please note that the ability of the Consultant team to satisfactorily complete the overall project within the anticipated completion schedule will be considered in the selection process. Cost, while not determinative, may be considered in the selection process.

SELECTION PROCEDURE

A proposal evaluation committee comprised of Commission staff will review each proposal. The most qualified Consultant Firm/s may be invited to participate in an interview with Commission staff, between the dates of February 20-21, 2025, to review qualifications and expectations prior to selection. Final selection is anticipated to be made prior to or on Tuesday, February 25, 2025.

COMMISSION PROCESS

1. General Conditions: The Commission reserves the right to cancel or reject all, or a portion or portions, of the request for proposals without notice. Further, the Commission makes no representations that any agreement will be awarded to any organization submitting a proposal. The Commission reserves the right to reject any and all proposals submitted in response to this request or any addenda thereto.

The Commission also reserves the right to reject any sub-consultant or individual working on a consultant team and to replace the sub-consultant or individual with a mutually acceptable replacement. Any changes to the proposal requirements will be made by written addendum.

2. Liability of Costs and Responsibility: The Commission shall not be liable for any costs incurred in response to this request for proposals. All costs shall be borne by the person or organization responding to the request. The person or organization responding to the

request shall hold the Commission and the County harmless from any and all liability, claim, or expense whatsoever incurred by or on behalf of that person or organization. All submitted material becomes the property of the Commission.

The selected Consultant shall be required to assume responsibility for all services offered in the proposal whether or not they process them within their organization. The selected Consultant will be the sole point of contact with regard to contractual matters, including payment of any and all charges resulting from the contract.

3. Validity: The Consultant agrees to be bound by its proposal upon execution of an agreement with the Commission, during which time the Commission may request clarification or correction of the proposal for the purpose of evaluation. Amendments or clarifications shall not affect the remainder of the proposal, but only the portion so amended or clarified.
4. Professional Services Agreement: It will be assumed that the selected Consultant is willing and able to enter into a Professional Services Agreement and providing required insurance. The Consultant will be responsible for adhering to, and complying with, requirements of the RFP.
5. Permits and Licenses: Consultant, and all of Consultant's sub-consultants, at its and/or their sole expense, shall obtain and maintain during the term of any agreement, all appropriate permits, certificates, and licenses, including but not limited to, a County Business License and Liability Insurance (as will be further specified in the Professional Services Agreement), which will be required in connection with the performance of services hereunder.
6. In addition to the above, all conditions located on the Sonoma County Community Development RFP web page are applicable to this RFP:
<https://sonomacounty.ca.gov/development-services/community-development-commission/rfp-rules-and-regulations>