

Informal Request for Proposals

**Consolidated Plan Development and Analysis of  
Impediments to Fair Housing and Related Services**

Due Date and Time:  
**Tuesday, August 27, 2019  
5:00 PM PST**

**CITY OF EUGENE**



**I. REQUEST FOR PROPOSALS**

**Project Description**

The City of Eugene requests proposals for development of the Eugene-Springfield Five-Year Consolidated Plan for the U.S. Department of Housing and Urban Development (“HUD”) Program Years 2020-2025 as well as an Analysis of Impediment to Fair Housing for the City of Eugene. Both must be completed in compliance with federal regulations.

**Proposal Submission**

Proposers must submit a total of 1 original proposal via email to Stephanie Jennings, Grants Manager at the City of Eugene by Tuesday **August 27, 2019 by 5:00 pm PST.**

Questions regarding the Informal Request for Proposals may be directed to Stephanie Jennings at [SJennings@eugene-or.gov](mailto:SJennings@eugene-or.gov) or at (541)682-5529.

**II. ANTICIPATED PROPOSAL SCHEDULE**

The following is the anticipated schedule for submission and review of proposals and award of the desired contract. This schedule is subject to change by the City in its sole discretion. **Any change to the proposal submittal deadline will be done by an addendum to the RFP.**

| <b>ACTIVITY</b>                            | <b>DATE</b>       |
|--|-------------------|
| ▪ Request for Proposals issued.....        | July 31, 2019     |
| ▪ <b>Proposal Submittal Deadline</b> ..... | August 27, 2019   |
| Submit proposals no later than 5:00 pm PST |                   |
| ▪ Estimated Award Notification.....        | September 6, 2019 |

The City reserves the right to delay any of the dates set forth above, if it is determined to be in the best public interest to do so. The contract shall become effective upon execution by the City.

### **III. Required Scope of Services**

#### **Introduction**

The purpose of this Request for Proposals (RFP) is to obtain the services of a qualified consultant to provide a combination of services for the City of Eugene. The City is seeking qualifications and proposals from Consultants interested in developing the Eugene-Springfield Five-Year Consolidated Plan for the U.S. Department of Housing and Urban Development (“HUD”) Program Years 2020-2025 and to produce the Analysis of Impediment to Fair Housing for the City of Eugene. Both must be completed in compliance with federal regulations.

#### **Project Background**

The City of Eugene receives federal Home Investment Partnerships Program (“HOME”) as the lead entity for the Eugene-Springfield HOME Consortium which includes the jurisdictions of Eugene and Springfield. Both Eugene and Springfield receive separate allocations of Community Development Block Grant dollars. Eugene and Springfield must submit a Consolidated Plan for both jurisdictions. Each jurisdiction will conduct a separate Analysis of Impediments.

Eugene and Springfield are responsible for developing and implementing the Consolidated Plan which sets the goals and objectives, identifies community needs, determines priorities, describes activities, establishes outcomes and outlines methods of distribution of the use of these funds through various programs and projects. The Plan must identify housing and community development needs, set priorities, and describe how HUD and other resources will be used for activities designed to meet needs of low to moderate income citizens residing in the entitlement area. The production of the Plan is built on participatory process with community residents, organizations, businesses, and other stakeholders and functions as a strategy to address housing and community development needs and priorities over a five-year period (2020-2024).

Further, as a recipient of these federal funds and required by Consolidated Plan regulation, 24 CFR 91, participating jurisdictions are required to submit a certification that it’s Affirmatively Furthering Fair Housing (“AFFH”) and must complete a comprehensive Analysis of Impediments. The AI is a review of impediments to fair housing choice in the public and private sector which include any actions, omissions or decisions taken because of race, color, religion, sex, disability, familial status, or national origin which restrict housing choices or the availability of housing choice. Additionally, any actions, omissions or decisions which have the effect of restricting housing choices or the availability of housing choices on the basis of race, color, religion, sex, disability, familial status, or national origin. The AI will provide essential, detailed information to policy makers, staff, housing providers, lenders and fair housing advocates. The AI will serve as the substantive, logical basis of fair housing planning for the community and assist in building public support for fair housing efforts.

#### **Project Description**

The City of Eugene is seeking a consultant to develop the Eugene-Springfield Five-Year Consolidated Plan for HUD Program Years 2020-2025. The time period for the Plan will be July 1, 2020 - June 30, 2025. The City is requesting proposals from qualified firms and individuals with proven experience in developing Consolidated Plans or similar planning documents, in compliance with all associated federal laws and regulatory requirements. The City intends to submit the 2020-2025 Consolidated Plan and Analysis of Impediments to the Portland HUD Field Office no later than May 15, 2020. A public engagement consultant with local knowledge will be selected separately to conduct public engagement activities for both the Eugene-Springfield Consolidated Plan and the Eugene Analysis of Impediments.

Additionally, as part of the Plan, the City certifies annually that it will affirmatively further fair housing, which means it will conduct an AI within the jurisdiction, take appropriate actions to

overcome the effects of any impediments identified through that analysis, and maintain records reflecting that analysis and actions in this regard. It should also provide clear direction for future One-Year Annual Action Plans, required as subcomponents of the next five-year framework. The AI under this proposal will solely cover the jurisdictional area of the City of Eugene.

The City of Springfield will concurrently issue a separate Request for Information (RFI) for a consultant to prepare the Springfield Analysis of Impediments. The RFI for the City of Springfield's AI is available on the Springfield website at <http://www.springfield-or.gov/city/development-public-works/housing-and-block-grant-programs>. Applicants to this RFP are encouraged to respond to the City of Springfield's RFI.

### **Scope of Work and Deliverables**

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

#### **A. Eugene-Springfield Five-Year Consolidated Plan ("Plan")**

##### **1. Plan - Objectives**

- i. Preparation of all reports as required by HUD for the Five-Year Consolidated Plan, Develop a Five-Year Plan for the program year 2020-2025 and meet the deadline for the Plan which is May 15, 2020;
- ii. Development of the Plan shall use existing data to help determine housing, homeless, special population, and community development needs. To the extent it is available, development of the Plan shall incorporate the most current data via the U.S. Census Bureau's American Community Survey (ACS), State of Oregon Housing Needs Analysis, and other relevant sources and/or initiatives;
- iii. Development of the Plan shall involve consultation and collaboration with separately procured public engagement consultant that will foster a community engagement process that facilitates participation at all levels, especially with low and moderate income persons, racial/ethnic minorities, and persons with barriers to participation, including all in legally protected classes;
- iv. Development of the Plan shall involve consultation and collaboration with separately procured public engagement consultant to involve consultation with a broad sector of the public and private agencies for collaboration and collective problem solving in determining needs, objectives, goals and priorities;
- v. The Plan shall consider community needs, and resources available to meet those needs;
- vi. Based on identified needs, the Strategic Plan portion of the Plan shall:
  - a. The priority needs populations as well as strategies to address the housing and community development needs of the identified priority populations
  - b. Strategies for meeting the needs in each priority area describing funds reasonably expected to be made available;
  - c. Identify quantifiable proposed accomplishments for each specific objective.
- vii. The Plan shall report on specific items required by HUD, such as reducing the number of families living in poverty and removing barriers to affordable housing;
- viii. The Plan shall be structured to serve as a basis for the jurisdictions' funding allocation processes and for assessing performance on an annual basis.

##### **2. Plan - Services and Deliverables**

- i. The services to be performed under the proposal include, but are not limited to:
  - a. Statistical and informational data collection and preparation of charts and narrative to prepare housing and homeless needs assessment per 24 CFR 91.205) and housing market analysis (24 CFR 91.210);

- b. Provide a variety of maps, including dot density, overlays, etc., depicting multiple characteristics and address specific maps to the Plan;
  - c. Development of a plan for consultation with public and private agencies as outlined in 24 CFR 91.100, including those that provide; affordable housing, health and public/human/ social services, state and/or local health and child welfare agencies regarding lead-based paint hazards, adjacent units of local government, including planning agencies, Public Housing Authorities, and agencies receiving funds within the eligible City of Eugene statistical area;
  - d. A minimum of three (3) trips to Eugene-Springfield will be required and be available to staff and public engagement consultant as needed;
  - e. Conduct engagement around needs assessment and collaborate with separately procured public engagement consultant on citizen participation activities as needed such as publishing information, surveys, conducting meetings, focus groups and hearings. Such activities must be carried out consistent with HUD guidance regarding providing meaningful language access and must respond to public comments as outlined in 24 CFR 91.100;
  - f. Using needs information obtained through data collection, consultation and citizen participation to make recommendations for Strategic Plan as outlined in 24 CFR 91.215 and for any associated policy issues;
  - g. Submit a draft Plan for staff review, facilitate the public review process for the draft Plan, produce an executive summary and presentation and provide final Plan for submittal to HUD.
- ii. The Consultant will be responsible for providing the following deliverables:
    - a. Submit one (1) original paper copy, one (1) electronic copy in pdf format and one (1) electronic copy of the Plan in HUD's required eCon Planning Suite web-based format. City staff will provide cover graphics and will combine that with pdf copy for distribution. The document shall be outlined in a format compatible with the eCon Planning Suite and approved by the City. The City will make the final determination on cover graphics and formatting of all documents.
    - b. Major document components related to Scope of Services shall include:
      - Citizen Participation and Consultation - in collaboration with separately procured public engagement consultant
      - Executive Summary
      - Housing Market Analysis and Needs Assessment
      - Homeless Needs Assessment
      - Non-Homeless Special Needs Assessment
      - Community Development Needs
      - Housing and Community Development Strategic Plan
      - Identify Potential Funding Sources
    - c. Attachments/Other:
    - d. Presentation Materials for stakeholder meetings, public meetings, and hearings.
    - e. Any other materials substantially relevant to the Consolidated Plan or its development process.

## **B. City of Eugene Analysis of Impediments to Fair Housing ("AI")**

### **1. AI - Objectives**

- i. Preparation of AI as required by HUD and meet deadline;
- ii. AI shall provide clear direction for future One-Year Annual Action Plans, required as subcomponents of the next five-year framework;

- iii. Consultant must complete AI in accordance with the HUD Fair Housing Guide and include all of the pertinent information and procedures outlined in the HUD Fair Housing Planning Handbook;
- iv. Development of the AI shall demonstrate professional methods of research/data collection and formulation. This data will be relevant to housing issues in the City of Eugene (i.e. demographics, household income, employment, housing profile, etc.);
- v. Preparation of the AI shall provide a comprehensive analysis of impediments and must include:
  - Fair Housing Plan, including goals and timetables,
  - Identified actions to be taken, and
  - Records maintenance system reflecting the analysis and actions taken;

## **2. AI - Services and Deliverables**

- i. The services to be performed under the proposal include, but are not limited to:
  - a. Data Collection & Review - Review of available background information and resource materials;
  - b. Provide a variety of maps, including dot density, overlays, etc., depicting multiple characteristics and address specific maps to the AI;
  - c. A minimum of two (2) trips to Eugene will be required and to Collaborate/Consult with separately procured public engagement consultant and be available for staff as needed to conduct outreach to fair housing stakeholders and the general public to provide the opportunity to take part in the AI development process;
  - d. A comprehensive review of the City codes, ordinances, administrative policies, practices and procedures, recommend changes in practices or policies;
  - e. An assessment of how those laws, etc., affect the location, availability and accessibility of housing choice;
  - f. An assessment of residents and the real estate industry awareness of fair housing issues;
  - g. An assessment of current land use and group home practices;
  - h. An analysis of differences in property taxes, controlling for home value and year of purchase, for different racial groups within the City;
  - i. An assessment of job opportunities in relationship to area or residential concentration of minorities and other classes of persons protected by the Fair Housing Act;
  - j. Documentation of the nature and extent of fair housing complaints/lawsuits or other data that may evidence achievement of or lack of fair housing choices;
  - k. Patterns of ownership versus rental, housing density, housing age and/or condition, overcrowding, income, family size, residency tenure, bank loans by type, etc.;
  - l. Demographic overview of Eugene, showing how the City compares to Lane County as a whole in racial composition, homeownership by race, affluence, and poverty by race and trends since 1990;
  - m. Home Mortgage Disclosure Act (HMDA) data, including FHA/VA loans, conventional home loans, housing refinance loans and home improvement loans;
  - n. Results of testing or case studies of incidents or problems of discrimination occurring within the City, including hate crimes, land use practices, occupancy standards, and advertising;
  - o. Results of Fair Housing Initiative Program (FHIP) grants (if applicable);
  - p. Records showing geographic patterns of occupancy in Section 8, Public and Assisted Housing, and private rental housing;

- q. An analysis of the “cost of unfair housing”, which causes certain specific special problems resulting from housing segregation and discrimination;
  - r. Complete an analysis of home sales trends, median and average sale price by type, number of households and size, and banking and lending practices. Compile data indicating the frequency and amount of those financial institutions’ lending in our community over the past five-year period;
  - s. Compile a vacancy rate study for rental properties by type/number of bedrooms and rental rates over the past two-year period;
- ii. The Consultant will be responsible for providing the following deliverables:
- a. Submit a draft AI to staff for comment and review;
  - b. Submit one (1) original paper copy, produce and executive summary and presentation, and one (1) electronic copy in pdf format. City staff will provide cover graphics and will combine that with pdf copy for distribution. The City will make the final determination on cover graphics and formatting of all documents.
  - c. Attachments/Other:
  - d. Presentation Materials for stakeholder meetings, public meetings, and hearings.
  - e. Any other materials substantially relevant to the Consolidated Plan or its development process.

**C. Final HUD Approval**

Should HUD not grant Final Approval of the Plan and/or AI, the Consultant must bring the document(s) to an acceptable level within the HUD-designated time frame.

**Implementation Schedule**

Project expected to begin as soon as possible after the City and the Consultant have a signed contract; the **Project is required to be completed to meet the HUD submission deadline of May 15, 2020.**

THE FOLLOWING PRELIMINARY SCHEDULE MAY BE ALTERED BY THE CITY AT ANY TIME WITHOUT PRIOR NOTIFICATION.

|   |                |
|---|----------------|
| Contract Start Date   | September 2019 |
| Draft Consolidated Plan Available for Staff Review                                      | November 2019  |
| Draft Consolidated Plan back to Consultant for Final Public Review Preparation          | December 2019  |
| Draft AI Available for Staff Review   | November 2019  |
| Draft AI back to Consultant for Final Public Review Preparation                         | December 2019  |
| Final Draft Consolidated Plan and AI Available for 30-Day Public Review                 | February 2020  |
| Public Hearing for Draft Consolidated Plan and AI                                       | March 2020     |
| Consultant Preparation of Final Consolidated Plan and AI                                | April 2020     |
| Final Consolidated Plan and AI Submitted to HUD   | May 2020       |
| Graphics and Document Production Work Complete on Final Consolidated Plan by City Staff | May 2020       |

## IV. PROPOSAL SUBMITTAL REQUIREMENTS

Proposals must be submitted in accordance with the submission requirements listed in Section II, Instructions to Proposers. Proposals should contain all of the information requested in the submittal category below, in the same order as presented below, and preferably include a table of contents. A completeness check will be conducted for each proposal. A complete submittal will make the proposer a 'Responsive Proposer' to be further evaluated.

### **SUBMITTALS**

#### **1. Written Proposal**

##### **a. Qualifications**

Discuss the overall capabilities of the organization, considering the items listed in the RFP. Include a brief description of the firm's history, experience and organizational structure. The same information should be provided for any subcontractors, along with the area of discipline or participation and approximate percentage of their contribution.

The Consultant must have direct experience with the development of Consolidated Plan(s) and/or federal Fair Housing plan(s) for HUD Entitlement Communities. Well-qualified consultants may also have direct experience with the development of other city housing-related documents such as Action Plans, Analysis of Impediments to Fair Housing Choice, Affordable Housing Strategies, Public Housing Authority Plans, Redevelopment Agency Housing Plans, Continuum of Care Narratives, or other similar documents. Experience working with cities with similar governing and management structures and community demographics is preferred. Direct experience working with HUD's eCon Planning Suite and the ability to access and submit the Consolidated Plan is required. The Consultant must have knowledge of and access to GIS software, including the mapping component and have the ability to create maps as needed to complete the project.

The Consultant must provide evidence of a professional liability insurance policy with a limit of not less than \$2,000,000 for claims for professional acts, errors, or omissions from the Work.

##### **b. Staffing Plan**

Identify the project manager and provide a summary of their background. The project manager shall be expected to be available on all occasions for discussion with Community Development staff, Housing Policy Board, and for public presentations. Submit an organizational chart showing the project manager, other key personnel, highlighting special qualifications relevant to their performance on each task. The specific responsibilities of the project manager and other key personnel should be detailed, along with the anticipated total effort, expressed in percentages of person/hours to be provided by each member of the supporting staff.

##### **c. Approach to Scope of Services**

Present a summary of approach to be utilized in accomplishing the primary objectives and scope of services as outlined in Section V of this RFP. The approach described in this section shall include components identified in Section V of this RFP, and any additional recommendations. Optional tasks should be clearly identified and distinguished from mandatory tasks.

**d. Work Plan & Schedule**

The schedule of services must include the elements to be performed by the Consultant, the number of hours and other resources required to complete each task, and the expected time to complete each step. The work plan should include time schedules and milestones, personnel assignments, and other information necessary to demonstrate the Consultant’s ability to complete the project on time.

**e. Resources from Participating Jurisdictions**

Provide a list of resources, personnel data, or other assistance the proposer expects to require from the participating jurisdictions in order to complete each task in the scope of services, during the planned time period.

The City of Eugene will be responsible for:

- Legal Advertising of all meetings and other required postings.
- Assisting in the procurement or arranging space for public meetings that will take place in Eugene and assisting with coordination with public engagement consultant as needed regarding public outreach for meetings.
- When identified prior to a meeting and/or event as a need, having a Spanish speaking staff person present.
- Providing the Consultant with copies of any existing handouts, reports, data and presentation information that are available.
- City of Eugene staff will be present at all public meetings and presentations.
- Working with Consultant to establish the five-year funding goals, priorities, and strategies, along with proposed accomplishments and performance measures.

The City of Springfield be responsible for:

- Assisting in the procurement or arranging space for public meetings that will take place in Springfield and assisting with coordination with public engagement consultant as needed regarding public outreach for meetings.
- When identified prior to a meeting and/or event as a need, having a Spanish speaking staff person present.
- Providing the Consultant with copies of any existing handouts, reports, data and presentation information that are available.
- City of Springfield staff will be present at all public meetings and presentations.

Working with Consultant to establish the five-year funding goals, priorities, and strategies, along with proposed accomplishments and performance measures.

**2. References**

Provide at least (3) three public agency clients for whom similar or comparable services have been or are being performed. Include the name, mailing address, phone and email of the principal representatives who can respond to questions.

**3. Cost Sheet**

Provide a table (or similar) detailing the proposed cost and allocation of resources including a total project cost as well as costs by deliverable. For each key task identify assigned team members by role, anticipated work hours, and hourly rate. Hourly rates shall include billing rates for straight time and overtime. Include all expenses such as travel time and travel expenses and the categories of reimbursable expenses not included in hourly rates. Provide the same information for any subcontractor(s).