



Request for Proposals

2025-2029 Consolidated Plan and
2025 Annual Action Plan

Release Date: Monday, November 13, 2023

Deadline for Submission: Wednesday, December 20, 2023 at 5:00 p.m. PST

Interview (if needed): Tuesday, January 9, 2024

Contact person:

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REQUEST FOR PROPOSALS

CITY OF CITRUS HEIGHTS

Purpose

The City of Citrus Heights (City) is requesting proposals from experienced consulting firms with expertise and understanding of the U.S. Department of Housing and Urban Development (HUD) as it relates to the development of a Five-Year Consolidated Plan, including first-year Annual Action Plan for the City of Citrus Heights. Citrus Heights receives and administers annual Community Development Block Grant (CDBG) allocation directly from HUD. The proposal will highlight the consultant capability to develop a Five-Year Consolidated Plan that will establish goals and strategies for housing and community development in the City of Citrus Heights for 2025-2029.

The City

The City of Citrus Heights, located in northeast Sacramento County, adjacent to the Placer County border, incorporated as a General Law city with a Council/Manager form of government in January 1997. The City has a population of approximately 86,433 residing in a 14 square mile area, in a mature, urbanized area estimated to be approximately 97% built-out. Citrus Heights is not a full-service city. The City currently provides services in the areas of police services, community development, public works, general administration, economic development, and finance. The City contracts with Sacramento County for some public works activities. Various special districts within Citrus Heights provide such services as water, fire, schools, and parks & recreation. The City Council priorities include: maintain and enhance fiscal stability, maintain public infrastructure and enhance alternative modes of transportation, diversity for a resilient economy, preserve and enhance public safety, and enhance community vibrancy and engagement.

Scope of Services

The Consultant selected will prepare the 2025-2029 Consolidated Plan and 2025 Annual Action Plan and must follow any and all HUD 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 Integrated Disbursement and Information System (IDIS) and the CPD Maps website, though it is desired that the consultant can also create maps. 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.

An overview of the Consolidated Plan process can be accessed on the HUD website at:
<https://www.hudexchange.info/programs/consolidated-plan/>.

Guidelines for preparing a Consolidated Plan may be found on the HUD website at:
<https://www.hudexchange.info/programs/consolidated-plan/guides/#consolidated-plan-template-in-idis>.

Consolidated Plan and Action Plan

The scope of services to be performed by the Consultant for each plan is as follows:

- Develop five-year Consolidated Plan and first-year Annual Action Plan in accordance with HUD requirements.
- Perform relevant consultations and data collection to complete the required HUD tables and the analysis of housing and non-housing needs.
- Prepare and Executive Summary for the Consolidated Plan and Annual Action Plan.
- Preparation of multi-lingual community questionnaire that would be posted on the City's website and paper copies distributed at key community locations.
- Assist staff to assess the existing community needs as necessary to develop new strategies, goals, and priorities.
- Assist staff with development of new strategies, objectives, priorities, and program for the Consolidated Plan and Annual Action Plan.
- Develop and incorporate a performance measure component as required by HUD requirements.
- Conduct and synthesize the results of consultations with private agencies, public agencies, and community groups as required.
- Assist staff with the review of the current Citizen Participation Plan to determine whether any changes are needed in order to meet HUD's requirements.
- Assist staff in presenting at a public hearing before the City Council for adoption of each plan. Public hearing date is scheduled for October 2024.
- Provide a shared resources folder – a shared drive with electronic copies of the documents – list of data sources, copy of data collected, consultations, records, and other supporting documentations used to develop the Consolidated Plan and Annual Action Plan.

Proposed Fee Structure and Timeline

Proposed budget by elements/task and hourly rate for staff by position/title.

Proposed timeline and work elements/tasks outlined in the Scope of Services. Note that the Consolidated Plan and first-year Annual Action Plan will go before Citrus Heights City Council in October 2024, with City staff submitting the Consolidated Plan on or before November 15, 2024.

Proposal Submittal Format and Requirements

Cover Letter

Cover letter on firm letterhead, signed by the person authorized to bind the firm into an agreement

- Complete legal name, address, telephone number, and email address
- Federal UEI number and Tax Identification Number
- Brief history of the firm and summary of the Consolidated Plan development experience
- Resumes of staff to be working on project

Qualifications and Experience (not to exceed 10 pages, single sided)

The following lists the minimum qualification requirements of the respondent(s):

- Statement of Qualifications to include a description of the approach the respondent will employ in carrying out the work described in the Scope of Services At least 5 current years of experience providing similar consulting services
- At least 3 references of clients currently/previously served
- Familiarity with HUD's eCon Planning Suite

- Knowledge of:
 - CDBG Regulations
 - Consolidated Plan, One-Year Action Plan methods of data collection, analysis and summarization (in narrative and graphic formats)
 - Various affordable housing, homeless, and community development resources and governmental agencies
 - Consolidated Plan, One-Year Action Plan and Consolidated Annual Performance (CAPER) best practices
 - HUD fair housing requirements
- Recent experience preparing Consolidated Plans and One-Year Annual Action Plans using the eCon Planning Suite
- Staff's proposed roles for this contract
- Must be in good standing with the State of California and not on the Federal Debarment List

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

Selection Process Overview

To be considered in the selection process, each respondent must have completed and submitted all requested documentation required in this RFP. A proposal evaluation committee comprised of City staff will review each proposal and scored based on the criteria outlined below. If needed, interviews will be held on January 9, 2024.

Criteria	Score
Understanding of the Project and Scope of Services	40
Consultant Team Experience: Experience of the consultant team directly related to the project and scope of services	40
Proposed Budget and Fee Structure	20
TOTAL	100

Key Action Dates/Timeline

Monday, November 13, 2023	Release RFP
Wednesday, December 20, 2023	RFP responses due no later than 5:00 p.m. PST
Completed by January 5, 2024	Internal review of all RFP responses
Tuesday, January 9, 2024	Interview top RFP respondents <i>(if needed)</i>
Thursday, January 25, 2024	City Council Approval if Contract is over \$50,000
Friday, January 26, 2024	Execute Contract
Week of January 29, 2024	Start work

General Terms & Conditions

Limitation: The Request for Proposals (RFP) does not commit the City of Citrus Heights (City) to award a contract, to pay any cost incurred in the preparation of the firm's RFP response or to procure or contract for services or supplies. The City reserves the right to accept or reject any or all RFP responses received as a result of this request, to negotiate with all qualified sources or to cancel all or part of this RFP.

Award: The firm/entity selected may be required to participate in negotiations and to submit such revisions of their proposals as may result from negotiations. The City reserves the right to award a contract/select a service provider without discussion based upon the initial proposals.

Insurance: The consultant shall maintain in full force and effect the insurance as outlined in **Attachment C**. The City reserves the right to waive or modify such insurance coverage. However, consultants meeting the insurance requirements will receive greater consideration during the selection procedure. All insurance shall be evidenced by a Certificate of Insurance and endorsement, acceptable to the Risk Manager, prior to execution of a contract. The consultant shall state their ability to meet the City's insurance requirements within their submittal.

Signature: The consultant's RFP response shall provide the following information: name, title, address and telephone number of individuals with authority to bind the service provider and also who may be contacted during the period of proposal evaluation. The consultant's RFP response shall be signed by an official authorized to bind the consultant, signifying complete understanding of and ability to comply with all requirements of the RFP, including those related to insurance as identified above.

Contract Termination/Debarment: A breach of the contract clauses in 29 CFR 5.5 may be grounds for termination of the contract and for debarment as a contractor and a subcontractor as provided in 29 CFR 5.12. The RFP/contract may be voided at any time for cause, by giving at least 14 days written notice, due to violations of any terms and/or special conditions of the RFP/contract, upon request of HUD/City, or withdrawal of the expenditure authority. It is a mutually understood between the parties that this RFP may have been written before ascertaining the availability of appropriation of funds, for the mutual benefit of both parties in order to avoid program and fiscal delays which would occur if the RFP were executed after the determination was made. The RFP is valid and enforceable only if sufficient current funds are made available to the Department by the United States Government for the Federal fiscal year. In addition, this RFP is subject to any additional restrictions, limitations, conditions or statute enacted by the Congress or State Legislature, which may affect the provisions, terms or funding of this RFP.

Assignment: Any contract resulting from this bid and any amendments or supplements thereto shall not be assignable by the successful bidder either voluntarily or by operation of law, without the written approval of the City and shall not become an asset in any bankruptcy, receivership, or guardianship proceedings. Any assignee would need to have equivalent qualifications as to retain award eligibility.

Conflict of Interest: Pursuant to 24 CFR 570.611, no member, officer, or employee of the Grantee, or its designees or agents, no member of the governing body of the locality in which the program is situated, and no other public official of such locality or localities who exercise or have exercised any functions or responsibilities with respect to the activities outlined in this RFP or assisted under this part, or who are in a position to participate in a decision-making process or

gain inside information with regard to such activities, may obtain a financial interest or benefit from an assisted activity, or have a financial interest in any contract, subcontract or agreement with respect to an assisted activity or its proceeds, either for themselves or those with whom they have business or immediate family ties, during their tenure or for one (1) year thereafter. Any such potential relationships must be disclosed prior to award.

Submission Instructions

One (1) PDF copy of the proposal including supporting documents must be received via email no later than **Wednesday, December 20, 2023 at 5:00 p.m. PST**, to:

Nicole Piva, Housing and Human Services Program Coordinator

E-mail: npiva@citrusheights.net

Late proposals will not be accepted.

Attachment C

Standard Insurance Requirements

Consultant shall indemnify, defend, and hold harmless the City, its officers, officials, agents, and employees from and against any and all claims, damages, demands, liability, costs, losses and expenses, including without limitation court costs and reasonable attorneys' fees arising out of or in connection with Consultant's negligent performance of work hereunder or its negligent failure to comply with any of its obligations contained in the Contract Documents, except such loss or damage which was caused by the [active negligence, (*only if contract involves design services in connection with a public works project - see Civil Code §2782(b), §2783*)] sole negligence, or willful misconduct of the City.

In order to comply with the bonding and insurance requirements contained in your contract with the City of Citrus Heights there are several things that we require. It is our intent to facilitate consideration of every project, so we are including here a **summary** checklist for your convenience.

All bonds and insurance requirements need to be complete and submitted prior to your contract being approved.

I. GENERAL

- A. **Send these requirement sheets to your insurance broker for immediate compliance.**
- B. **NO CONTRACTS WILL BE APPROVED UNTIL ALL BONDS AND CERTIFICATES ARE IN ORDER.**
- C. New and renewal Certificates and endorsements must reference a specific job. "All Operations" certificates are not acceptable.
- D. All contractors and subcontractors working on a project or jobsite must meet the same insurance requirements you do, prior to starting work on the project or site.
- E. All insurance companies must have an AM Best rating of A:VII or better.
- F. Any deductibles must be declared to and approved by the City.
- G. All insurance coverage, with the exception of Professional Liability coverage must be written on a full "per occurrence" basis.
- H. A 30-day cancellation notice is required, and written or modified to a form that binds the insurer to provide it. For non-payment of premium, a 10-day notice is acceptable.
- I. Expiration dates are required on all certificates.
- J. All Bonds and Certificates must have an original signature.

II. SPECIFIC COVERAGE

- A. **GENERAL LIABILITY/AUTOMOBILE LIABILITY**
 - GENERAL LIABILITY**
 - \$2,000,000 General Aggregate
 - \$2,000,000 Products and/or Completed Operations
 - \$1,000,000 Each Occurrence
 - AUTOMOBILE LIABILITY**
 - \$1,000,000 Combined Single Limit
- B. **WORKERS' COMPENSATION AND EMPLOYER'S LIABILITY**
 - \$1,000,000 Employer's Liability
 - STATUTORY Workers' Compensation
- C. Professional Liability

The consultant and its contractors and subcontractors shall secure and maintain in full force, during the contract term professional liability insurance policies appropriate to the respective professions and the work to be performed as specified. The limits of such professional liability insurance coverage shall not be less than \$1,000,000 per claim and \$2,000,000 aggregate. If requested by the City, the consultant's insurer must provide a complete, certified copy of the professional liability insurance policy.

III. ENDORSEMENTS

A. The GENERAL LIABILITY AND AUTOMOBILE LIABILITY policies are to be endorsed to contain, the following provisions:

1. The Entity, its officers, officials, employees, and agents are to be covered as insureds with respect to liability arising out of automobiles owned, leased, hired or borrowed by or on behalf of the contractor; and with respect to liability arising out of work or operations performed by or on behalf of the Contractor including materials, parts or equipment furnished in connection with such work or operations. General Liability coverage shall be provided in the form of an **Additional Insured endorsement** (CG 20 10 11 85 or equivalent) to the contractor's insurance policy, or as a separate owner's policy.
2. There must be an **endorsement** indicating that coverage is primary and non-contributory with respect to additional insureds.
3. There must be an **endorsement** that includes a severability of interest clause. (cross liability).
4. Where applicable, the General Liability policy shall contain an endorsement or provision stating that such insurance applies to the liability assumed by any subcontractor. (Owners and Contractors Protective)
5. The General Liability coverage shall be at least as broad as ISO form CG 00 01 (ed. 10/01).
6. The auto coverage shall be provided for owned, hired, and non-owned autos.
7. The auto coverage shall be as broad as ISO form CA 00 01.

B. The WORKERS COMPENSATION/EMPLOYERS LIABILITY policy must contain an endorsement with a waiver of subrogation in favor of the City of Citrus Heights for all work performed by the contractor, its employees, agents and subcontractors.

C. Acceptance of any bond, certificate of insurance, or endorsement showing proof of insurance required by your contract does not constitute approval or agreement by the City of Citrus Heights that the insurance requirements have been met or that the bond or insurance policies referenced on any certificates and endorsements are in compliance with your contractual requirements.