

# Request for Proposals Housing Conditions Survey



March 23, 2015

**REQUEST FOR PROPOSAL  
FOR CONSULTING SERVICES TO CONDUCT HOUSING CONDITIONS SURVEY**

The County of Tulare requests consulting services for the completion of a housing condition survey of the entire County and catalog and map residential infill lots. The County is interested in negotiating a contract with an eligible service provider capable of implementing all phases of the survey and assisting in general program administration in conformance with the conditions of the grant.

The purpose of this request for proposal is to conduct a random sampling housing condition survey of a statistically adequate number of units. The survey shall be selected from unincorporated communities, hamlets, areas adjacent to and within the boundaries of incorporated cities, and census designated places throughout the entire County. Survey data will be used to update the Tulare County's 2015 Housing Element and to supplement future grant applications.

**Award Evaluation Criteria**

Criteria that will be used to evaluate all proposals that are received are listed below:

Proposal quality and completeness	10 %
References	5 %
Understanding of Project	10 %
Schedule and availability to County staff.	15 %
Experience/Quality of Work	30%
<u>Cost</u>	<u>30 %</u>
Total	100%

Cost will be evaluated by taking the lowest price as the 30% and the highest price as 10%. The other costs will receive % points based on ratio to the cost differential of price relative to lowest price.

While Tulare County's decision is not solely based on the lowest price, it will endeavor to hire the service provider whose program appears to be the most responsible and responsive.

**Submittal of Proposals**

To be considered, respondents must submit five (5) copies of their respective proposals by **5:00PM, Thursday April 9, 2015** to the County of Tulare (County), Resource Management Agency, Planning Department, Attn: Charles Przybylski, 5961 South Mooney Boulevard, Visalia, CA 93277. Questions regarding this RFP may be directed to Charles Przybylski at (559) 624-7131

The County reserves the right to reject any and all proposals submitted, to conduct the housing condition survey in-house, to request clarification or additional information from competitors, to negotiate appropriate modifications, and to waive any irregularity in the proposal. Formal interviews may be conducted. Proposals received by the County are subject to the Freedom of Information Act and the Public Records Act.

### Award of Contract

The County reserves the right to award a contract to the firm that presents the proposal which, in the sole judgment of the County, best demonstrates the expertise desired by the County. This Request for Proposal does not represent a commitment on the part of the County to award a contract. The County reserves the absolute right to reject any and all proposals and to negotiate appropriate modifications.

If funds allocated to this project are not made available, withheld or reduced by any federal, state, regional or local government entity, the County is under no obligation to fund this project, including, but not limited to, any agreement that may be negotiated for project management services which is the subject of this RFP.

Service providers must be prepared to carry out and implement the work tasks in the following description.

### **Proposed Scope of Work**

Preparation of the survey and methodology shall consider the following:

Units to be surveyed shall be selected from the unincorporated areas of Tulare County. The focus of the survey will include the 40 Hamlets and Communities as listed in the Tulare County General Plan. The following places will also be included in the survey: Matheny Tract (Tulare), Patterson Tract (Visalia), Toolyville (Exeter), East Porterville (Porterville), Tract 92 (Visalia), Hypernicum (Farmersville), Elderwood (Woodlake), Globe (Springville) and other County housing areas.

To achieve a large enough sample size to assure capturing a reliable representation of the area, the sample size shall be one in seven. As of January 1, 2014, the California Department of Finance estimates a total of 44,884 existing housing units in the unincorporated area. A survey minimum of 7,533 units.

Random sampling will be achieved by selecting one in seven units of housing units in the unincorporated areas of Tulare County. Construct a survey foundation using a combination of sources including but not limited to: 1) cross-referencing assessor parcel numbers with tax assessment records to identify properties with buildings; 2) retrieving information from the County's building permit database; 3) using APN maps to select suitably spaced units; and 4) using 2010 census data on the number of housing units in each census tract and block group to calculate an adequate sampling from each.

The housing conditions surveys may be "windshield" surveys, but must comply with HCD guidelines on random sampling, adequate sampling size and definitions of housing conditions. Results may be tallied on lists or survey forms, which shall be subject to prior County approval (*see Attachment 1 for a sample provided by HCD*). Respondents are encouraged to propose innovative survey techniques that meet HCD requirements for Housing Elements and for funding sources.

Surveyed units shall be identified by housing condition with address, assessor's parcel number (APN), place name, and 2010 U.S. Census tract with block group. Housing conditions shall be described as either: 1) "standard", 2) "deteriorated", or 3) "dilapidated" (needing demolition and/or reconstruction.) Units in "deteriorated" condition shall be broken into categories of

those needing minor repairs, moderate rehabilitation, or substantial rehabilitation. Housing stock shall be evaluated according to HCD criteria set forth in Chapter 16 of the CBDG Management Manual. Please explain in detail how this HCD criteria will be evaluated for housing units.

The surveyor shall have knowledge and experience with construction and housing rehabilitation programs for low income families

Reports using 2010 U.S Census data shall also be generated for each community (by census tract and block group). Information in the reports shall include structures constructed prior to 1960 and for overcrowding.

Reports shall be compiled to include information that:

- 1) Summarize and calculate the numbers and percentage of units in each housing condition category in each area.
- 2) Identify specific units whose owners might benefit from participating in the County's housing rehabilitation program.
- 3) Sort alphabetically by Community, Hamlet, CDP, and other areas.
- 4) Sort by Community, Hamlet, CDP and other area, the highest to lowest percentage of units in the three categories: standard condition, deteriorated condition and in dilapidated condition.

The final product will consist of a summary report and table(s) of housing conditions in the census tracts/block groups, unincorporated communities and/or remaining unincorporated areas of Tulare County. Columns will list both the number and percentage of units in each area that are in standard, deteriorated and dilapidated condition, with a total of units in the area. A separate table will break out the deteriorated units into those needing minor repairs moderate repairs, or substantial rehabilitation.

The final product shall be used in the 2015 Housing Element and shall consist of the more detailed reports listed above, with a summary narrative highlighting survey and census data results for the communities within each market area. The information shall also be provided to the County as a Microsoft Access database for future access and reporting. Maps, lists, survey forms or tally sheets, reports and other supporting materials shall become the County's property after project end.

One or more members of respondent's staff shall be made available to meet with County staff as needed to discuss work progress and will provide monthly progress reports describing the status of work performed. Respondent will also assist the County with reports required by the Department of Housing and Community Development (HCD), necessary technical assistance to implement and administer the State Grant Agreement, liaison between the County and State, and other services to be mutually agreed upon.

## **Proposed Schedule**

The housing conditions survey information shall be completed by June, 15 2015.

- May 2015 - Prepare Survey Foundation/ Methodology and Obtain County Approval
- May – June 2015 - Perform In-Field "Windshield" Housing Conditions Surveys and infill research.
- June 15, 2015 - Compile Results into Summary Report (and Database) and submit to the Resource Management Agency.

## Proposed Costs

Respondent's proposed costs shall be broken down into specific tasks under the categories of Survey Foundation, Field Surveys and Report Compilation, with an overall project total.

## Contents of Proposal

1. Respondents shall describe how they would implement a program responding to the requirements of a housing conditions survey for the housing element update.
2. Respondents shall submit a description of the proposed project management, work schedule in excel, description on how the project schedule will be achieved, a list of milestones/deliverables, a description of anticipated compensation and costs by work task, with an overall project total.
3. Respondents shall explain their proposed billing and payment terms.
4. Each respondent shall prepare a statement of experience and qualifications for the proposed work. The statement shall include:
  - a. Resumes of project staff.
  - b. Past experience conducting similar housing conditions surveys in rural communities, including ability to evaluate housing repair needs and proficiency with database creation and report generation.
  - c. Past involvement with government-funded housing rehabilitation programs, specifying communities and funding sources.
  - d. Past experience preparing information used in a recent California Housing Element that is acceptable to HCD.
5. Each respondent shall list references of previous contracts with other counties or cities for performing housing conditions surveys for working on Housing Element(s) and/or for implementing government funded housing rehabilitation programs. Please provide a brief description of work performed for each reference.
6. Each respondent shall prepare a statement that:
  - a. Respondent is licensed or certified within their specialty, or a statement that such is not required.
  - b. Respondent will comply with all State and Federal requirements, including those pertaining to labor standards, non-discrimination, Americans with Disabilities Act, Equal Employment Opportunity and Drug-Free Workplace.
  - c. Respondent will provide certificates of insurance in amounts of at least \$1,000,000, if selected, to include an indemnification provision, subject to Tulare County approval, for service provider's activities, general liability and automotive liability insurance naming the County of Tulare, their officers, employees and volunteers as "additional insured".
  - d. Respondent maintains at least the minimum State-required Worker's Compensation, unemployment, disability and liability insurance.
  - e. Where funds allocated to this project are not made available, withheld or reduced by any federal, state, regional or local government entity, the County of Tulare is under no obligation to fund this project, including, but not limited to any agreement that may be negotiated for project management services which is the subject of this RFP.
7. Each respondent must comply with Executive Order 11246 (<http://www.dol.gov/ofccp/regs/statutes/eo11246.htm>). Provide firm's policy regarding affirmative action.
8. The proposal shall be limited to ten pages.