



**CITY OF  
TUCSON**



**Pima County, Community Development and Neighborhood Conservation  
City of Tucson, Housing & Community Development Department**

**Request for Proposal: October 15, 2018**  
Proposal number: CDNC-HCD-10-15-18-AI-ConPlan-APP

**TITLE: City of Tucson Pima County Analysis of Impediments of Fair Housing  
Choice & Consolidated Plan Update**

Program Years: July 1, 2020 through June 30, 2025  
Issue Date: October 15, 2018

**Proposals Due: Friday, November 16, 2018 at 4:00 P.M., Arizona (MST)**

**Submit Two (2) Signed Proposal and One Complete Digital Copy in a sealed envelope clearly marked on the outside with the Proposal number, title, due date, time and Applicant's name to:**

Daniel Tylutki, Senior Program Manager  
Community Development and Neighborhood Conservation Department  
2797 E. Ajo Way, 3<sup>rd</sup> Floor  
Tucson, AZ 85713

**SOLICITATION:**

The City of Tucson and Pima County Consortium are accepting proposals from qualified firms (Consultant) with experience and understanding of US Department of Housing and Urban Development (HUD) Community Planning and Development (CDP) entitlement grant funding as it relates to the execution of the Analysis of Impediments to Fair Housing Choice (AI), 2020-2025 Consolidated Plan (Con Plan), and respective Annual Action Plans (AAPs) providing any other related services in accordance with applicable Federal, State, and Local requirements. An electronic version of this RFP is located at:

<http://webcms.pima.gov/cms/One.aspx?portalId=169&pageId=24903>

Applicants are required to check this website prior to the due date for addenda and/or additional information to assure that the proposal incorporates all addenda. Prospective Applicants may also pick up a copy of the RFP Monday through Friday, 8 am to 5 pm MST, at the above address.

## **I. Proposed Project**

The City of Tucson and Pima County Consortium (collectively “the Consortium”) is seeking consulting services for the preparation of the updated Analysis of Impediments to Fair Housing Choice (AI) and five-year Consortium Consolidated Plan for the period covering July 1, 2020 through June 30, 2025. Consultant services will also include development of Citizen Participation Plan and respective City of Tucson and Pima County Annual Action Plans (AAPs) as referenced in the Proposed Scope of Work.

The successful consultant will be issued a single cost reimbursement contract with Pima County for the proposed scope of work in this RFP. The City of Tucson will enter into an Intergovernmental Agreement with Pima County to provide half the funding to complete the AI, Con Plan and AAP’s utilizing available HUD administrative funds. Pima County and the City of Tucson reserve the right to amend the scope and budget to include additional housing, community development, or HUD planning related work as needed.

The Consortium anticipates an 18 month planning process to complete the AI (6 months), Con Plan and respective Annual Action Plans (12 months). The Consortium does not have to submit an Assessment of Fair Housing; however, would like to update its AI in advance to guide the development of the Con Plan. The target start date and term for the proposed services is January 1, 2019 through June 30, 2020 subject to negotiation of a final agreement.

## **II. Proposal Due Date**

Proposals are due Friday, November 16, 2018 at 4:00 P.M., Arizona (MST).

Submit two (2) signed proposals and one complete digital copy in a sealed envelope clearly marked on the outside with the Proposal number, title, due date, time and Applicant’s name to:

Daniel Tylutki, Senior Program Manager  
Community Development & Neighborhood Conservation Department  
2797 E. Ajo Way, 3rd Floor  
Tucson, AZ 85713

## **III. Consultation with City of Tucson / Pima County Staff:**

The main purpose for the Consortium to solicit for Consultant services is to a facilitate an effective, third-party “non-governmental” community process, meaningful discussion, and establish trust from community stakeholders. The Consortium will expect the Consultant to have the capacity to exercise independent judgment and to perform those actions necessary to achieve project completion in a manner consistent with those expected of senior technical and management staff. While the Consultant will be working with key City of Tucson and Pima County planning, housing, community development and GIS staff, it should be understand that the Consortium will rely on the personnel, experience and expertise of the Consultant to ensure all necessary components of the process are completed in a timely manner. The Consortium will actively participate in the design and analysis process, in addition to, being actively engaged, whenever possible, in outreach and listening activities.

Core Consultant duties are to include research, data analysis, document preparation with a strong emphasis on community engagement, public participation and effective meeting facilitation. Consortium GIS staff will be made available as necessary. It is anticipated that the term to complete all planning processes and deliverables will be 18 months, i.e. six (6) months for the AI and 12 months for the Con Plan, Citizen Participation Plan and respective APPs. The Consortium can supply printing and copying services, A/V equipment, and meeting location and scheduling services.

#### **IV. Proposed Scope of Work and Timeline**

The proposed Scope of Work and preliminary schedule from the Consortium's previous Con Plan process is listed below; however, Proposers are encouraged to modify their responses as needed. In addition to preparing and entering all required narratives, data fields, tables and forms into the HUD Integrated Disbursement and Information System (IDIS) eCon Planning Suite, as required for the completion of the Con Plan and respective AAPs, the Consortium will require a "Paper" Consolidated Plan appropriate for public presentation and review. The proposed scope of work and timeline is as follows subject to negotiation:

- A. Update the City of Tucson and Pima County Analysis of Impediments to Fair Housing Choice (AI) – January 2019 through May 2019. The analysis must include the following:
  1. An examination of pertinent and available data including demographic, income, employment and housing data as well as studies that have been completed that relate to Fair Housing.
  2. A review of prior and current activities that promote Fair Housing, including an assessment of agencies currently providing Fair Housing Programs in the area.
  3. An examination of private market issues that relate to the sale or rental of housing, the provision of brokerage services, mortgage lending, insurance sales and underwriting, property appraisal and property management.
  4. An evaluation of public policies and practices which affect the provision of Fair Housing including, but not limited to, public services; state and local laws; ordinances and regulations; planning/zoning laws and decisions; land use regulations; community development funding policies and practices in areas of low and high opportunity; procedures and practices of the local public housing authority; and, property tax policies, including but not limit to, tax exemptions.
  5. Identification of impediments to Fair Housing listed in order of priority with proposed methods of corrective actions to address identified impediments.
  6. The following is expected to be completed as part of the AI:
    - a. Identify, with City and County staff, community forums or public meetings needed in the endeavor of gathering information and the potential groups needed to participate. The Consultant will be responsible for preparing agendas, handouts and other presentation material as appropriate as well as maintain notes and rules of each public meeting.

- b. In direct coordination with City and County GIS staff, provide data and analysis to update maps and layouts.
  - c. Provide a draft of the AI report for review and comment by City and County staff.
- B. City of Tucson / Pima County Consortium Consolidated Plan. Consultant is expected to prepare the FY 2020–2025 Con Plan in accordance with all applicable federal and local regulations, notices, and guidance for HUD Consortia Consolidated Plans, eCon Planning Suite, and CPD Maps. The consolidated planning process is subject to stringent federal regulations with mandatory deadlines which are inflexible. The Con Plan must incorporate the following elements:
1. Data Collection and Analysis – May through August 2019
    - a. Tasks include, but are not limited to:
      - i. Review available local, state, and federal datasets, tables and statistics.
      - ii. Complete analysis.
      - iii. Develop Indicators/Thresholds for Public Forum Topics.
      - iv. Develop online survey to solicit community and stakeholder input.
    - b. Meetings include, but are not limited to:
      - i. Up to four (4) City/County program staff meetings.
      - ii. Four (4) monthly Team (i.e. Key Consultant, City and County staff) meetings, status reports and next steps.
      - iii. Up to four (4) expert meetings (including Fair Housing).
    - c. Deliverables include, but are not limited to:
      - i. Completed HUD data tables and maps.
      - ii. Online survey.
      - iii. Information for Community Forums.
  2. Community Forums – September through December 2019
    - a. Tasks include, but are not limited to:
      - i. Develop format and presentations.
      - ii. Develop marketing materials and coordinate with Consortium in event promotion.
      - iii. Collect and summarize information.
      - iv. Facilitate discussions and respond to questions.
    - b. Meetings include, but are not limited to:
      - i. Up to two (2) City/County multi departmental staff meetings.
      - ii. Four (4) monthly team meetings, status reports and next steps.
      - iii. Four (4) to six (6) community forums.

- iv. Deliverables include a summary of existing priorities for Pima County and City of Tucson respectively, including but not limited to:
  - a) Public comments.
  - b) Proposed program design ideas and strategies from Community Forums.
  - c) Cross reference to existing planning document including Plan Tucson and Pima Prospers 10-year General/Comprehensive Planning documents.
- 3. Draft Documents – January through March 2020
  - a. Tasks include, but are not limited to:
    - i. Prepare Draft Paper Con Plan for public consumption taking into consideration elements that must be inputted into the HUD eCon Planning Suite.
    - ii. Coordinate with City and County GIS staff as needed for all maps and layouts.
    - iii. Solicit feedback from City and County staff and identified local experts involved in plan implementation.
  - b. Meetings include, but are not limited to:
    - i. Four (4) monthly Team meetings, status reports, and next steps.
    - ii. Two to four public presentations to various stakeholders.
  - c. Deliverables include completed Draft 5-year City of Tucson / Pima County HUD Five Year Consolidated Plan with proposed investment strategies, priorities, maps and data tables.
- 4. Public process, final drafts, and HUD submission:
  - a. Tasks include, but are not limited to:
    - i. Entering the Consolidated Plan into HUD eCon Planning Suite.
    - ii. Prepare and enter respective Program Year-One Annual Action Plans for City of Tucson and Pima County, respectively, into HUD eCon Planning Suite.
    - iii. Solicit feedback from City and County staff and identified local experts involved in plan implementation.
  - b. Meetings include, but are not limited to:
    - i. Four (4) monthly Team meetings, status reports, and next steps.
    - ii. Two to four formal public meetings which may include presentations to City of Tucson Mayor and Council and Pima County Board of Supervisors.
  - c. Deliverables include, but are not limited to, the following final draft documents:
    - i. *City of Tucson / Pima County Analysis of Impediments to Fair Housing Update 2020-2020,*
    - ii. *City of Tucson / Pima County HUD Five Year Consolidated Plan 2020-2025,*
    - iii. *City of Tucson HUD Annual Action Plan, Program Year One,*

- iv. *Pima County HUD Annual Action Plan, Program Year One, and*
- v. Successful entry and submittal of all required HUD Plans, supporting documents, and attachments into IDIS eCon Planning Suite.

**V. Evaluation Criteria and Interviews:**

- A. A panel of Consortium staff will review and evaluate proposals based on the following criteria:
1. **Approach.** The Consultant’s approach, work plan, recommended schedules, suggested responsibility assignments and identified staff. Proposers may include resumes of staff, and/or subcontractors, identified to work on the project as an attachment **(20%)**:
  2. **Projects and References.** Qualifications and experience in providing the requested services as exemplified by past related projects and client contracts. Proposers shall incorporate three (3) references in this section and hyperlinks to appropriate work examples **(20%)**:
  3. **HUD Related Planning.** Experience and qualifications with as they relate to Fair Housing laws and Consortia Consolidated Plan regulations **(20%)**:
  4. **Public Outreach.** Knowledge, experience and approach to conducting effective community outreach and public involvement in conducting planning processes; collecting, analyzing and presenting data, developing and conducting surveys, and drawing accurate conclusions **(20%)**:
  5. **Budget.** Anticipated time frame to complete project and, flat rate, total project cost as detailed in the following table **(20%)**:

Task	Timeline	Cost
AI		
Con Plan and Public Participation Plan		
City of Tucson AAP		
Pima County AAP		
<b>Total</b>		

- B. The Consortium reserves the right to request interviews with the Proposer(s) to request clarifications prior to making a funding decision.

**VI. Submittal Requirements and Proposed Formatting**

The Evaluation Criteria shall be addressed separately and form the framework of the proposal. Proposers shall limit their responses to this RFP to 10 pages, not including attachments.

- A. Submittal Requirements:
1. **Cover Letter**, including the following information:

- a. Legal name of firm and mailing address.
  - b. Federal Tax ID# and DUNS# if available.
  - c. Verification of "Good Standing" with Arizona Corporation Commission and Sam.gov.
  - d. Signed by an authorized agent (person who has the authority to contract, e.g. President, Chief Executive Officer).
2. **Submit two (2), three-hole punch hardcopy proposals with attachments attached with a paper clip.** Please do not staple or bind the hardcopies.
  2. **One (1) searchable, PDF file of cover letter, entire proposal and attachments, on USB Drive or other usable media.** The PDF version will be distributed for review, not the hard copy, please keep this in mind if the proposal includes color.
- B. Formatting Requirements:
1. Proposal should be typed in minimum 12-point font with 1 inch margins.
  2. Use page numbers for the entire proposal.
  3. Copy and paste just the Evaluation Criteria Section Headings, e.g. "**Approach,**" in organizing the proposal response.

## VII. Documents

Existing City of Tucson and Pima County Consortium HUD plans, documents and checklists are available as follows:

- 2015-2020 Consolidated Plan:*  
[https://webcms.pima.gov/UserFiles/Servers/Server\\_6/File/Community/CDNC/Publications/Annual%20Action%20Plan/5%20Year%20HUD%20Consolidated%20Plan%20FY%202015-2019.pdf](https://webcms.pima.gov/UserFiles/Servers/Server_6/File/Community/CDNC/Publications/Annual%20Action%20Plan/5%20Year%20HUD%20Consolidated%20Plan%20FY%202015-2019.pdf)
- 2015-2020 Consolidated Plan, as amended:*  
[https://www.tucsonaz.gov/files/hcd/Amended\\_Five\\_Year\\_Consolidated\\_Plan\\_2015\\_2019.pdf](https://www.tucsonaz.gov/files/hcd/Amended_Five_Year_Consolidated_Plan_2015_2019.pdf)
- Analysis of Impediments to Fair Housing Choice:*  
[https://www.tucsonaz.gov/files/hcd/Pima\\_and\\_Tucson\\_2015\\_Analysis\\_of\\_Impediments\\_-\\_FINAL.pdf](https://www.tucsonaz.gov/files/hcd/Pima_and_Tucson_2015_Analysis_of_Impediments_-_FINAL.pdf)
- Other City of Tucson Housing and Community Development HUD related documents:*  
<https://www.tucsonaz.gov/hcd/plans>
- Other Pima County Community Development documents, including HUD plans:*  
<http://webcms.pima.gov/cms/one.aspx?portalId=169&pageId=12301>

## **VIII. Contract Award Process and Provisions**

- A. Selection of Consultant will be through a panel of Consortium staff.
- B. Proposal responses will be evaluated in accordance with Pima County Board of Supervisors Policy D-29.1 according to the criteria described. Proposers will have five working days to file a protest of the recommendations in accordance with the Pima County Procurement Code, Section 11.20.010.
- C. Recommendations will be used to award “not-to-exceed” contracts for consideration by the Procurement Director and/or County Board of Supervisors. Pima County may require the Consultant selected to participate in negotiations, and to submit such price, technical, or other revisions of their applications as may result from negotiations. Pima County will hold all applications submitted in confidence pending completion of awards and negotiations, subject to any applicable public records request. Following award, contracts and submitted proposals will be available to the public.
- D. Receipt of a Proposal by the Consortium does not constitute acceptance of an offer to provide services. Pima County, as lead contracting entity, reserves the right to:
  - 1. Renew contract(s) for up to five subsequent one-year periods.
  - 2. Amend scope of work and budget to include additional HUD eligible planning and administration services.
  - 3. Award local monies from the City of Tucson, Pima County, State of Arizona and the Federal government to contractors receiving funding under this Solicitation.
  - 4. Accept or reject any or all of the proposals received and to cancel in part or in its entirety this request if it is in the best interest of the County to do so.
  - 5. Make no fund award.
  - 6. Negotiate necessary adjustments in proposed funding levels and program activities.
  - 7. Use other approved methods to identify partners, consistent with Pima County codes and policies and federal regulations.
- C. This Solicitation incorporates Pima County Standard Terms and Conditions. Any Contracts awarded pursuant to this Solicitation will contain the Community Development and Neighborhood Conservations Department’s Standard Provisions. Both documents along with a sample contract form are available upon request.