

REQUEST FOR QUALIFICATIONS



Second Unit Rehab Loan Program RFQ

County of San Mateo Department of Housing

Release Date: January 2, 2018

Responses must be Received
by 5:00 p.m. Pacific Standard Time
on January 26, 2018

REQUEST FOR QUALIFICAITONS
FOR
Second Unit Rehab Loan Program RFQ

Interested respondents must register online with the County at
www.publicpurchase.com

Responses must be submitted electronically to
www.publicpurchase.com

By 5:00 p.m. Pacific Time on January 26, 2018

RESPONSES WILL NOT BE ACCEPTED AFTER THIS DATE AND TIME

Note regarding the Public Records Act:

Government Code Sections 6250 *et seq.*, the California Public Record Act, defines a public record as any writing containing information relating to the conduct of the public business. The Public Record Act provides that public records shall be disclosed upon written request and that any citizen has a right to inspect any public record unless the document is exempted from disclosure.

Be advised that any contract that eventually arises from this Request For Qualifications is a public record in its entirety. Also, all information submitted in response to this Request For Qualifications is itself a public record **without exception**. Submission of any materials in response to this Request For Qualifications constitutes a waiver by the submitting party of any claim that the information is protected from disclosure. By submitting materials, (1) you are consenting to release of such materials by the County if requested under the Public Records Act without further notice to you and (2) you agree to indemnify and hold harmless the County for release of such information.

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SECTION I - GENERAL INFORMATION

A. STATEMENT OF INTENT

As outlined in more detail in Section II – Scope of Work, This RFQ seeks responses from any and all qualified agencies or individuals to provide Second Unit Rehab Loan Program Administration services in conjunction with the County’s Second Unit Amnesty Program.

For years, housing development in San Mateo County has not kept up with the thousands of new jobs added, and the problem has gotten worse in recent years. This jobs-housing gap drives up the cost of housing for homebuyers and renters alike, produces congestion and long commutes for workers, and forces our friends and family members to move away because they can no longer afford to live here.

One way to increase the supply of affordable housing in San Mateo County is through the proliferation of small living units that share a lot with single family homes. These units come in many forms and have many names—second units, junior second units, granny flats, in-law units, and accessory dwelling units (ADUs). Second units can be attached to the main house, a second story on a garage, a converted garage, or a stand-alone building. Whatever the configuration, second units are required to have a kitchen, bathroom, and a place for sleeping.

While most second units in unincorporated San Mateo County are created with all necessary permits, inspections, and approvals, there are a number of second units that are created without some or all of these steps. Like permitted units, these may include units created by conversion of existing structures - such as portions of existing homes, within garages, or within existing accessory structures, or units built as new structures - either attached to or detached from the primary residence on a property. There are no definitive estimates of the number of such units in the County, but anecdotal reports, and various attempts to formally or informally estimate the number of units, place that number in the hundreds, or even thousands.

Through a multi-Agency effort, the County has developed a new and limited-time Second Unit Amnesty Program for second units that require construction improvements in order to greatly improve the safety of the unit. Owners of an unpermitted second unit within the unincorporated county can participate in the Second Unit Amnesty Program. The homeowner is responsible for making the improvements to the second unit to the standard of the Second Unit Amnesty Program. Eligible homeowners participating in the Second Unit Amnesty Program may request financing from the San Mateo County Department of Housing to assist with construction costs through the Second Unit Rehab Loan Program. The Second Unit Amnesty Program and corresponding Second Unit Rehab Loan Program are expected to launch no sooner than May 1, 2018, and no later than July 1, 2018.

B. THE REQUEST FOR QUALIFICATIONS PROCESS

The County of San Mateo seeks by way of this RFQ to survey qualified providers about their knowledge and expertise regarding the provision of Second Unit Rehab Loan Program Administration services, or similar services, indicated. Agencies or individuals must be able to show that they are capable of performing the services requested. Such evidence includes, but is not limited to, the respondent's demonstrated competency and experience in delivering services of a similar scope and type and local availability of the respondent's personnel and equipment resources.

The information in this RFQ is in no way final nor does it represent what may be contained in a future RFP. This RFQ does not constitute a commitment to issue an RFP, award a contract, or pay any costs incurred in the preparation of a response to this request.

SECTION II – SCOPE OF WORK

A. DESCRIPTION

The San Mateo County Department of Housing (DOH) is seeking a Loan Program Administrator. DOH is creating a Loan Program that will be available to eligible homeowners in the unincorporated county who are seeking financial assistance in order to make improvements to existing second units in accordance with a new and limited-time County Second Unit Amnesty Program. Approximately \$500,000 in Measure K funds will be made available for the loan program, with a portion of the funding available to fund the administration of the program. The Loan Program would launch no sooner than May 1, 2018, and no later than July 1, 2018, and the County expects to make 7-12 loans with the funds currently allocated over a two-year period.

The County anticipates a pilot launch of the Second Unit Amnesty Program between May 1 and July 1, 2018 with a full launch projected for September 1, 2018. The pilot would be targeted towards approximately five owners of unpermitted second units in order to test the Program's initial and final inspection protocol. Potential participants in the pilot would be selected by the County Buildings & Planning Department and offered an incentive(s) to complete the inspection process with the County. Incentive payments would be drawn from the \$500,000 Loan Program fund and would also be administered by the Loan Program Administrator. DOH anticipates no more than three incentive payments would be made to each pilot program participant. The Second Unit Rehab Loan Program would also be available to eligible pilot participants.

In addition, Loan Program Administrator responsibilities would include: vetting the County's proposed loan program design; screening of loan applicants for program eligibility; assisting applicants with the application process and comprehension of loan terms; working with DOH to discuss amendments to the loan program as required; and other duties as needed.

B. FUNDING

Approximately \$500,000 in Measure K funds would be made available for the loan program, with a portion used to fund the administration of the program and the pilot incentive payments.

C. ADDITIONAL REQUIREMENTS/CONSIDERATIONS

DOH is seeking a skilled organization or individual with experience: working with homeowners; working with owners of second units; creating and administering loan programs; working with government agencies (preferably the San Mateo County Department of Housing); and managing occupied rehabs.

SECTION III – GENERAL TERMS AND CONDITIONS

Register at publicpurchase.com. All potential respondents must register with Public Purchase to receive important updates about the RFQ process and to submit responses.

Read all Instructions. Read the entire RFQ and all enclosures (if any) before preparing your response.

Questions and Responses Process. Submit all questions relating to this RFQ to the designated questions field associated with this RFQ at publicpurchase.com.

All questions must be received no later than 5:00 p.m. on January 12, 2018.

All questions and responses will be posted to publicpurchase.com.

If changes to the RFQ are warranted, they will be posted to the publicpurchase.com website. It is the responsibility of each respondent to check the website for changes and/or clarifications to the RFQ prior to submitting a response.

Contact With County Employees. As of the issuance date of this RFQ and continuing until the final date for responses, all respondents are specifically directed not to hold meetings, conferences, or technical discussions with any County employee for purposes of responding to this RFQ except as otherwise permitted by this RFQ.

Respondents may submit questions or concerns using the questions and answers process as stated above.

Miscellaneous. This RFQ is not a commitment or contract of any kind. The County reserves the right to pursue any and/or all ideas generated by this RFQ. The responses shall be used to determine the respondent's ability to render the services to be provided. The failure of a respondent to comply fully with the instructions in the RFQ may eliminate its response from further evaluation as determined at the sole discretion of the County.

SECTION IV – REQUEST FOR QUALIFICATIONS PROCEDURE

This section describes the general RFQ procedure used by the County, and the remaining sections of this RFQ list the requirements.

A. TENTATIVE SCHEDULE OF EVENTS

EVENT	DATE
Release Request for Qualifications	January 2, 2018
Questions Submitted to County Deadline	January 12, 2018
Release Responses to Questions	January 17, 2018
RFQ Response Deadline	January 26, 2018
Review of Responses ⁽¹⁾	February 9, 2018

(1) Dates are subject to change

B. SUBMISSION OF RESPONSES

Public Purchase Registration: Providers/service providers interested in responding to this RFQ must register online with the County of San Mateo at www.publicpurchase.com. The County will not be held responsible for or liable for registration errors.

Responses: The RFQ response will be submitted electronically to www.publicpurchase.com by 5:00 p.m. Pacific Standard Time on January 26, 2018.

All responses must be received by the stated date and time in order to be considered for review. The County will not be responsible for and may not accept late responses due to slow internet connection, or for any other electronic failure (including but not limited to information transmission and internet connectivity failures) of the publicpurchase.com system.

C. RESPONSE REVIEW AND SELECTION

During the review process, the County may require a respondent's representative to answer specific questions orally and/or in writing. The County may also require a visit to the respondent's offices, other field visits or observations by County representatives, or demonstrations as part of the overall RFQ review.

Responses to this RFQ must adhere to the format detailed in Section V - RESPONSE SUBMISSION REQUIREMENTS. The criteria used as a guideline in the review will include, but not be limited to, the following:

- Firm qualifications and experience, including capability and experience of key personnel and experience with other public or private agencies to provide these services
- Proposed approach, including clarity of understanding of the scope of services to be provided and appropriateness of the proposed solution/services

- Customer service
- History of successfully performing services for public or private agencies
- Ability to meet any required timelines or other requirements
- Cost to the County for the primary services described by this RFQ
- References
- Compliance with County RFQ and County requirements

SECTION V – RESPONSE SUBMISSION REQUIREMENTS

The response should be submitted in the following format:

A. GENERAL INSTRUCTIONS

All responses should be typewritten or prepared on a computer and have consecutively numbered pages, including any exhibits, charts, and/or other attachments.

All responses should adhere to the specified content and sequence of information described by this RFQ.

Submit one (1) complete electronic (PDF, Microsoft Word document, etc.) version of your response and any required attachments to the County via www.publicpurchase.com per the instructions found on the publicpurchase.com website. If paper submissions are also required, follow the instructions in C.2. below.

B. COVER LETTER

Provide a one page cover letter on your letterhead that includes the address, voice and facsimile numbers, and e-mail address of the contact person or persons. List the name of each person authorized to represent the respondent in negotiations.

C. RESPONSE CONTENT AND FORMAT

1) Response Narrative (5 pages maximum)

Items below contain brief descriptions of material that must be included in this response.

- Summary of Qualifications

Describe the agency's history, mission, programs, and services it provides; administrative structure; and experience in providing similar services. With the history include length of time in business, and any experience working with public agencies. Describe how this program will fit into your overall organization. Attach an organizational chart.

- Cultural Competency

Describe how your agency/program will ensure cultural competence. This may include culturally relevant service features and staffing objectives that reflect cultural and linguistic diversity and that value the cultural diversity of San Mateo County.

- **Service Methodology**
Describe your service model and approach to addressing the service needs of the target population, your approach to working collaboratively with multi-agency partners, and the geographic area of the County, if applicable.
- **Staffing – Organizational Capacity**
Describe proposed staff and their duties, including disciplines and degrees, as appropriate. Describe your process for initial and ongoing licensing checks, including waivers. Describe current and ongoing training and experience of staff to ensure client needs will be addressed. Identify the person who will be overseeing the County account. Provide the level of education, background and experience that this person has.
- **Implementation Timeline**
Describe your proposed implementation work plan, including timeline for the implementation of services. Demonstrate the capacity to implement the program by no sooner than May 1, 2018, and no later than July 1, 2018. The initial loan program term will be 24 months from program start.
- **Start-up Requirements**
Describe start-up requirements and the lead-time necessary to begin providing services as a part of your implementation plan above.
- **Quality Assurance**
Describe criteria for how potential employees are screened and what their qualifications are. Describe how you guarantee quality services over time. Describe measurements/metrics/deliverables/assessments you will provide on at least an annual basis to allow the County to assess the services you will provide.
- **References**
Include three references recently familiar with the quality and reliability of the respondent's work. Include the name, mailing address, contact person, and phone number for each reference.
- **Insurance**
The County has certain insurance requirements that must be met. In most situations those requirements include the following: the contractor must carry \$1,000,000 or more in comprehensive general liability insurance; the contractor must carry motor vehicle liability insurance, and if travel by car is a part of the services being requested, the amount of such coverage must be at least \$1,000,000; if the contractor has two or more employees, the

contractor must carry the statutory limit for workers' compensation insurance; if the contractor or its employees maintain a license to perform professional services (e.g., architectural, legal, medical, psychological, etc.), the contractor must carry professional liability insurance; and generally the contractor must name the County and its officers, agents, employees, and servants as additional insured on any such policies (except workers compensation). Depending on the nature of the work being performed, additional requirements may need to be met.

- Cost Analysis and Budget for Primary Services
 - Provide a detailed explanation for all costs associated with your providing the requested services.
 - Include costs associated with start-up requirements, if such requirements were included above.

2) Response Submissions

- Submit one (1) signed, original response electronically through www.publicpurchase.com. Responses must be signed by the respondent. An unsigned response may be rejected. A response may be signed by any authorized agency representative of the respondent.
- Paper copies of the response are requested and should be typewritten; have consecutively numbered pages; including any attachments; and be securely bound. For ease of reference, include a Table of Contents by page number.
 - Submit two (2) paper copies.
 - Submit paper copies of the response in a sealed package clearly indicating the title of this RFQ. Include name and address of the respondent. Responses are to be sent to the address indicated in paragraph C.3.

3) Response Due Date

All responses must be received by 5:00 p.m. on January 26, 2018. Responses are not considered complete unless they include the following items: one (1) copy including original signature of respondent uploaded to www.publicpurchase.com and two (2) hard copies of response mailed to:

Lindsay Haddix, HCD Management Analyst
San Mateo County Department of Housing
264 Harbor Boulevard, Building A
Belmont, CA 94002

Any responses delivered after 5:00 p.m. on January 26, 2018 may be rejected by the County as not meeting the requirements of this RFQ.