

**REQUEST FOR PROPOSALS  
RFP 2021-02  
COACHELLA VALLEY'S REGIONAL EARLY ACTION PLANNING (REAP) REVENUE  
STREAM FEASIBILITY STUDY FOR HOUSING AND ASSOCIATED TRANSPORTATION  
NEEDS**

**BACKGROUND AND GENERAL DESCRIPTION**

**NOTICE**

The Coachella Valley Association of Governments (CVAG) is soliciting proposals to retain a firm who can research and analyze sustainable funding mechanisms for affordable housing and related transportation investments. The key deliverable from this project will be a Regional Strategic Plan to spur development of affordable housing and associated transportation infrastructure in the Coachella Valley. Each CVAG member jurisdiction has a general plan and housing plan that identifies opportunities for housing development, particularly workforce and affordable housing. CVAG's role is to identify and facilitate strategies to bring these plans together. This project specifically addresses an element essential to all: a stable, sustainable revenue stream. This plan will serve as the blueprint for future policy development at CVAG and our member jurisdictions. It will help elected officials determine how possible revenue source options would best benefit the region. This project is in line with other regions and cities that have conducted similar studies to gain a clear understanding of the potential funding strategies available to them.

Creation of the Regional Strategic Plan will require a community engagement strategy that provides statistically valid survey data, which can help educate and build support for recommendations from the study. As outlined in the timeline, the community engagement will begin after draft recommendations have been presented but will be conducted in connection with finalization of the plan itself. The survey method will incorporate, at a minimum, online public meeting platforms to reach a broad cross-section of Coachella Valley residents. This will ensure that community feedback is incorporated into the plan and final recommendations.

The Regional Strategic Plan will need to consider local, regional, and state administrative and legislative processes that may be required for its implementation. The final plan will be presented for adoption to elected officials via the CVAG Executive Committee, along with any policy recommendations required to carry it out.

**PROJECT BACKGROUND**

The Regional Early Action Planning (REAP) program was included in California's Fiscal Year 2019/2020 budget to address the State's housing crisis from a planning perspective. REAP projects are intended to facilitate implementation of the Regional Housing Needs Assessment (RHNA) through housing planning and process improvement. Both REAP and RHNA are administered by the Southern California Association of Governments (SCAG), who recently finalized the 6<sup>th</sup> Cycle RHNA Allocation Plan outlining the additional housing required in the Coachella Valley through 2029. As a subregional partner to SCAG, CVAG is eligible to allocate

REAP funding toward one or more planning efforts that boost housing production and related supportive infrastructure.

The CVAG REAP allocation will build on the direction that the Transportation and Executive Committee have provided when discussing ways to fund housing, homelessness, and transportation projects in Coachella Valley. An assessment of options will provide CVAG committee members data and guidance for policy development. This project will result in a comprehensive analysis of funding options, including a possible sales tax measure, that could be generated from a broad range of sources to address key housing and transportation needs including availability of both affordable and workforce housing, growing concerns about rent burden shouldered by Coachella Valley residents, and maintenance of existing transportation corridors under continued growth. This REAP-funded study will include extensive community engagement and will result in a long-term blueprint for future policy development in the Coachella Valley.

## **PROJECT OVERVIEW**

The Coachella Valley's total population is comparable with that seen in a single big city, yet it is divided into nine cities, three tribal nations, and three school districts, as well as unincorporated communities. Over the years, numerous, but separate, planning documents from each of these agencies have identified opportunities and challenges for sustainable communities. These myriad efforts have often led communities to compete against themselves for limited funding, and would benefit generally from a regional revenue source.

The primary function of the Regional Strategic Plan is to identify funding opportunities for new workforce and affordable housing development. There has been interest among Coachella Valley elected officials to explore a variety of funding options including Enhanced Infrastructure Financing Districts (EIFDs), Community Revitalization and Investment Authorities (CRIAs), and other tax increment or value capture tools. A proposal could also include of a sales tax or bond measure.

The Regional Strategic Plan will facilitate the region's housing goals identified in the RHNA Allocation Plan by increasing or accelerating housing development, and will promote SCAG's Connect SoCal transportation and housing priorities. It should also be designed to complement the general plans and housing elements of local municipalities, as well as the regional initiatives being led by community partners. The plan will include language describing how CVAG and its member jurisdictions can better position themselves to take advantage of public funding programs like the State of California's Affordable Housing and Sustainable Communities program or its Infill Infrastructure grant program.

The plan should further identify mechanisms to prioritize sustainable development projects that reduce greenhouse gas emissions. Finally, the plan will identify any administrative or legislative processes at the local, regional, and/or state level that will need to be engaged for effective implementation.

## **PROJECT TASK LIST**

The task list below is a general outline of the scope of work. The consultant is encouraged to review and add to or revise this list as experience and expertise would dictate. The overall project

goals are the guiding factor. The completeness of the task list will be one of the proposal evaluation criteria.

The work includes:

- Evaluation of existing revenue sources to identify opportunities & policy gaps.
- Evaluation of a sampling of revenue sources used by other communities to address affordable housing needs, including applicability to the Coachella Valley.
- Evaluation of at least three funding scenarios that would include dedicated independent funding for housing, a combined funding source for both housing and transportation, and funding for transportation projects that would expressly facilitate housing development. An impact analysis should be conducted for each alternative, and should identify how the mechanism will directly benefit housing development.
- Meetings with governing agencies, business organizations and community-based organizations.
- Analysis of and recommendations for policy initiatives to reduce barriers to regional financing options, including actions that could be taken to support the competitiveness of CVAG or its members for funds.
- Analysis of and recommendations for building community support and coalitions that will implement the funding options.
- Incorporation of input into master strategic plan & circulate draft to stakeholders.
- Development and implementation of a broad community engagement strategy that provides statistically valid survey data, which can help educate and build on the recommendations and include a survey method that incorporates online platforms to reach a broad cross-section of Coachella Valley residents.
- Finalization of a Regional Strategic Plan and production of digital copies to be circulated for adoption by the CVAG Executive Committee

In addition, the consultant will be asked to produce project meeting lists and provide feedback for the grant's monthly progress reports.

A detailed task list with deliverables is included as Attachment A, but may be amended in consultation with the selected consultant.

These efforts will focus on the Coachella Valley with the possible inclusion of the Palo Verde Valley communities including the City of Blythe.

## **PROJECT TIMELINE**

The project is anticipated to end no later June 2023. Upon awarding a contract, preliminary analysis of funding mechanisms and development of community engagement strategies will be completed by June 2022, after which CVAG will review and provide feedback. Initial community outreach and further refinement of analysis will take place through September 2022, at which point draft findings will be presented to CVAG Committees for feedback. Community engagement will continue until findings are finalized and a policy recommendation can be made to the CVAG

Executive Committee no later than June 2023. This timeline may be refined through discussion with the selected consultant.

## **PROPOSAL FORMAT**

The consultant's proposal should describe the methodology to be used to accomplish each of the project tasks as well as the qualifications of the individuals who will perform the tasks and prepare written and oral reports to CVAG. The proposal should also describe the work which shall be necessary in order to satisfactorily complete the task requirements. These descriptions should include the strategy and method which will be utilized in analyzing the various funding mechanisms and soliciting community feedback for incorporation into the Regional Strategic Plan.

The proposal should be no more than 15 pages in length, excluding the cost proposal. Front and rear cover will not be included in the 15-page count. The contract shall be a lump sum (firm fixed price).

## **EVALUATION CRITERIA**

A Consultant Selection Committee, determined by CVAG staff, shall review each Proposal and, if necessary, will conduct an interview with the consultant's project management and key personnel of the most qualified firm(s).

The Consultant Selection Committee shall rate each interviewed firm's technical proposal and identify the ranking of proposals in a selection order based upon the following criteria:

- Understanding of the work to be done (30 points possible)
- Relative cost of work (30 points possible)
- Experience with similar kinds of work. (15 points possible)
- Quality of staff for work to be done (10 points possible)
- Familiarity with related planning procedures (10 points possible)
- Completeness of task items list (5 points possible)

## **PROPOSAL SUBMISSION TIMELINE**

- RFP release: August 30, 2021
- Requests for clarification: 5:00 PM local time, September 10, 2021
- Final proposal submission: 5:00 PM local time, October 1, 2021
- Tentative Notice of Intent to Award: October 15, 2021

All proposals and accompanying materials shall become the property of the Coachella Valley Association of Governments upon submittal. Questions regarding this RFP should be directed to CVAG Management Analyst for Contracts and Procurements Michael Gladish via e-mail at [mgladish@cvag.org](mailto:mgladish@cvag.org). All requests for clarification and comments must be provided via email to [mgladish@cvag.org](mailto:mgladish@cvag.org) on or before **September 10, 2021 by 5:00 pm**. Answers/Clarifications shall be provided in the form of formal Addenda and shall be posted to CVAG's website in a timely manner.

Proposals shall be submitted electronically to the email above, and must be received and date stamped at CVAG no later than **5:00 p.m. on October 1, 2021**. Proposals shall include acknowledgement of any and all Addendums.

## **SELECTION PROCESS AND SCHEDULE**

A selection committee will evaluate each proposal according to the criteria set forth in this RFP. CVAG will then perform a reference verification process by contacting and interviewing the references provided by the firms. Following this reference verification process, the firm(s) receiving the highest evaluation from the selection panel may be invited to interview.

## **PROTEST**

Proposers have the right to protest the contract award. A written protest must be filed with CVAG's Executive Director, or designee, within five (5) working days after posting of the Notice of Intent to Award. CVAG will not accept verbal protests. The protest must be a detailed, written statement of the grounds and reference the RFP title and name of the designated Contracts Administrator. The protest must be submitted to CVAG's Executive Director or designee via certified mail using the following address:

Tom Kirk  
Executive Director  
73-710 Fred Waring Dr., Ste. 200  
Palm Desert, CA 92260

## **MINIMUM INSURANCE REQUIREMENTS FOR FINAL CANDIDATE**

- Professional Liability – \$1,000,000 per claim and in the aggregate
- General Liability – \$1,000,000 per occurrence, \$2,000,000 general aggregate, for bodily injury, personal injury, and property damage
  - Additional Insured Endorsement
  - Waiver of Subrogation Endorsement
- Workers' Compensation (Statutory Limits) and Employers Liability Insurance (with limits of at least \$1,000,000)

Attachment A: Proposed task list and deliverables

Task	Name	Description	Deliverable
<b>1</b>	<b>Project Management</b>		
1.1	Kickoff meeting	Review project scope, metrics, timeline, and reporting requirements	Proposed workplan and timeline: <i>1 week after meeting</i>
1.2	Monthly reporting	No less than monthly check-ins with CVAG staff to review progress	Monthly progress narrative
1.3	Monthly invoicing	No less than monthly invoices to CVAG specifications	Monthly invoice package
<b>2</b>	<b>Data Gathering and Existing Conditions</b>		
2.1	Evaluation of existing revenue sources	Evaluate existing revenue sources to identify opportunities and policy gaps	Technical memo: <i>June 2022</i>
2.2	Evaluation of revenue sources in use by other communities	Evaluate revenue sources in use by other communities to address transportation and affordable housing needs, including applicability to the Coachella Valley	Technical memo: <i>June 2022</i>
2.3	Evaluation of at least three funding scenarios	Evaluation of at least three funding scenarios that would include dedicated independent funding for housing, a combined funding source for both housing and transportation, and funding for transportation that would expressly facilitate housing development.	Report comparing funding alternatives, direct benefits to housing production, and a financial impact analysis for each alternative: <i>September 2022</i>
<b>3</b>	<b>Policy Initiatives</b>		
3.1	Analysis of policy initiatives	Analyze policy initiatives to reduce barriers to regional financing options and support competitiveness of CVAG for funds	Policy recommendation: <i>September 2022</i>
3.2	Analysis of public support	Analyze methods of building community support and coalitions that will implement funding options	Policy recommendation: <i>September 2022</i>
<b>4</b>	<b>Stakeholder Engagement</b>		
4.1	Initial community outreach	Early public scoping of potential funding mechanisms	Outreach strategy: <i>March 2022</i> Meeting notes and attendance sheets: <i>September 2022</i>
4.2	Continued community outreach	Continued public scoping to refine analysis and strengthen support for recommendation	Meeting notes and attendance sheets: <i>June 2023</i>
<b>5</b>	<b>Regional Strategic Plan</b>		
5.1	Draft Regional Strategic Plan	Draft a regional strategic plan selecting a preferred funding alternative based on financial sustainability and political feasibility, supported by statistically valid survey data gathered from stakeholder engagement	Document outlining preferred revenue source, policy recommendations to implement, and a review of public support: <i>April 2023</i>
5.2	Adopt Regional Strategic Plan	Distribute Regional Strategic Plan to CVAG Executive Committee for review and adoption	This task will be undertaken by CVAG staff: <i>June 2023</i>

\*This task list, timeline, and deliverables are for the purposes of project scoping, and may be amended through discussion with the consultant