Instructions are provided in blue and may be deleted. Please complete your response in the template provided, and indicate clearly where separate documents are provided.

Executive Summary

1. Respondent Information

|  |  |
| --- | --- |
| Company Name |  |
| Company Address |  |
| Location of Office to Perform Services under this RFQ |  |
| City Vendor ID | Note: Possession of this number serves as partial verification that the Respondent has completed the City’s administrative requirements (see Attachment III for more details). |

## 2. RFQ Contact

Clearly identify the person that will serve as the overall RFQ contact.

|  |  |
| --- | --- |
| Name |  |
| Title |  |
| Email |  |
| Phone |  |
| Address |  |

## 3. Respondent Overview

|  |
| --- |
| Respondent Firm Ownership and History. Briefly describe your firm, including history, organizational structure, ownership structure, and names of principals. Include any information that may be of value to the City in evaluating your firm’s qualifications for the Service Areas your firm is interested in providing to the City.  Insert Response Here. |
| **Number of years in business.** How long has your firm provided services for low and moderate income renters or cooperatively-owned homeowners.  Insert Response Here. |
| Total Staff Size. Statement of your firm’s total staff size, as well as the staff size of the local or regional office that will perform services described in your firm’s response.  Insert Response Here. |
| Pending Litigation. Briefly describe any pending litigation or litigation related to consulting services provided by your firm within past three years of this RFQ issue date. If none, state “None.”  Insert Response Here. |
| Clients Relationships Severed for Reasons Other than Convenience. Provide a list of your clients where the contractual relationship was not completed and was severed for reasons other than convenience. A brief description of why the relationship was severed and the name of the client and the client’s project manager are also required. If none, state “None.”  Insert Response Here. |

Minimum Qualifications

## 1. Minimum Qualifications

**Respondents not meeting these minimum qualifications, as demonstrated through the Prior Projects information provided, will not be considered and their RFQ responses will be deemed non-responsive and not be evaluated. Be sure to complete this section as described.**

**The Respondent certifies that it:**

1. **RFQ ATTACHMENTS: Has completed the requirements and submitted the forms described in RFQ Attachments I, II, and III as part of RFQ response, as applicable.**

**🞏 Yes**

1. **EXPERIENCE: Has demonstrated successful completion of at least two (2) projects within the past ten (10) years in or substantially similar to each Service Area marked by the Respondent in Attachment III in the Prior Projects section below. The lead staff proposed to be assigned to the City’s project(s) must individually have had a substantially similar lead role in at least two (2) of the projects described in the Prior Projects section below.**

**🞏 Yes**

## 2. Service Areas Checklist (“Checklist”)

Please indicate the Service Areas for which your firm meets or exceeds the Experience Minimum Qualifications. Demonstrate experience by providing examples of deliverables in the template provided on the last page of this attached (page 8).

|  |
| --- |
| 1. **Multi-Family General Pool:** selected proposers must demonstrate providing advisory services such as performing financial analyses in connection with:    1. particularly complex affordable and mixed-income projects with a variety of housing types, including public housing, conversion of public housing under the Rental Assistance Demonstration Program, affordable and market-rate rental housing, and affordable and market-rate ownership housing;    2. the structuring of the City’s multifamily affordable housing development programs;    3. the issuance of Certificates of Participation for purposes of financing multi-phased, mixed income, multifamily rental and ownership housing;   the compilation and analyses of general economic data as may be required  **🞏** My firm has successfully completed at least two (2) projects for entities within the past ten (10) years including, but not limited to the Prior Projects provided as part of my response.  **🞏** The lead staff my firm is proposing to be part of the City’s team are the same lead staff that worked on at least two (2) of the Prior Projects provided as part of my response. |
| 1. **Single-Family General Pool:** selected proposers must demonstrate providing advisory services such as performing financial analyses including but not limited to:      1. the structuring the City’s single-family affordable housing lending and grant programs; 2. the optimal use of housing assistance programs and federal, state and local funding sources;   the compilation and analyses of general economic data, as may be required  **🞏** My firm has successfully completed at least two (2) projects for entities within the past ten (10) years including, but not limited to the Prior Projects provided as part of my response.  **🞏** The lead staff my firm is proposing to be part of the City’s team are the same lead staff that worked on at least two (2) of the Prior Projects provided as part of my response. |
| 1. **Bond Pool:** selected proposers must demonstrate providing advisory services such as performing financial analyses including but not limited to:      1. multifamily housing revenue bond issuances related to competitive sales, negotiated sales and private placements of the bonds; 2. taxable or tax-exempt general obligation bonds to finance the development of affordable rental and homeownership housing; 3. re-fundings of currently outstanding bond issuances;   single family housing revenue bond issuances and the Mortgage Credit Certificate (MCC) program.  **🞏** My firm has successfully completed at least two (2) projects for entities within the past ten (10) years including, but not limited to the Prior Projects provided as part of my response.  **🞏** The lead staff my firm is proposing to be part of the City’s team are the same lead staff that worked on at least two (2) of the Prior Projects provided as part of my response. |
| 1. **Affordable Housing Fund/Inclusionary Housing Pool:** selected proposers must demonstrate providing advisory services such as performing financial analyses including but not limited to: 2. the analysis and calculation of the Affordable Housing Fee (including annual adjustments) set forth in the Inclusionary Affordable Housing Program ordinance (San Francisco Planning Code, Section 415; 3. evaluating and revising analyses used in connection with the Inclusionary Affordable Housing Program; 4. analysis and calculation of the Affordable Housing Fee (including annual adjustments) set forth in the Jobs-Housing Linkage Program ordinance (San Francisco Planning Code, Section 413, and, 5. evaluating and revising analyses for the Jobs-Housing Linkage Program.   **🞏** My firm has successfully completed at least two (2) projects for entities within the past ten (10) years including, but not limited to the Prior Projects provided as part of my response.  **🞏** The lead staff my firm is proposing to be part of the City’s team are the same lead staff that worked on at least two (2) of the Prior Projects provided as part of my response. |

3. Prior Projects

Using the template provided on page 8, provide detailed information on a minimum of two (2), maximum of five (5) successfully completed projects (100% completed) that demonstrate the Respondent’s qualifications for EACH Service Area marked in the Checklist above (see Section 2).

Select the projects that best demonstrate your experience for each Service Area and that are the most applicable to the City’s needs described in the RFQ Scope of Work. Projects may be no more than ten (10) years old, and should demonstrate that the Respondent meets the Experience Minimum Qualifications.

Contacts for each project are required, and may serve as references for the Respondent. The City will not inform Respondents when references will be contacted. The Respondent should ensure that client contact information listed in the response is up-to-date and should notify clients that the City may be contacting them. See Attachment I, Section 11.

Failure to provide the information requested will result in a lower evaluation score.

## 4. Sample Products

Please attach up to two (2) project product examples that demonstrate your experience providing the deliverables specified or similar to those listed under the Service Area(s) for which your firm would like to be pre-qualified. These sample products are not to be used by the Respondent as a substitute for providing all requested information in this Attachment.

Note that all documents under this RFQ process are subject to public disclosure. Please redact confidential or proprietary information as appropriate.

**Client List**

Attach or insert a client list that illustrates the breadth and depth of your firm’s experience in providing services identified in Service Areas listed in #2.

Insert Response Here.

**Staff Qualifications**

Use the following table or alternative format to indicate firm principals and key staff members, including Local Business Enterprise and other subconsultant staff, proposed to perform services under this RFQ. Include as many rows as necessary.

Include years of experience for the proposed individuals in services (or related services for subconsultants) under this RFQ. Respondents are encouraged to include resumes or curriculum vitae (“CV”) in lieu of providing a narrative.

|  |  |
| --- | --- |
| Name and Title | Experience and Qualifications |
| Name  Title and/or Role | Insert narrative here, or indicate if resume or CV is attached. |
| Name  Title and/or Role | Insert narrative here, or indicate if resume or CV is attached. |
| Name  Title and/or Role | Insert narrative here, or indicate if resume or CV is attached. |
| Name  Title and/or Role | Insert narrative here, or indicate if resume or CV is attached. |
| Name  Title and/or Role | Insert narrative here, or indicate if resume or CV is attached. |

**Firm Approach**

1. Describe your firm’s proposed approach to services and activities described in Section 2, Scope of Work of the RFQ.   
   *Insert Response Here.*
2. What makes your firm’s approach to providing services desired under this RFQ that are different or more effective than other firms providing the same services? E.g. methodology, staff roles and responsibilities, documentation processes.  
   *Insert Response Here.*
3. What can your firm do to ensure a successful engagement with the City? What project performance outcomes do you expect to provide to the City?  
   *Insert Response Here.*
4. Describe any other asset, expertise, experience, data or technology that provides your firm with a competitive edge or advantage.  
   *Insert Response Here.*

**Fee Proposal**

**Provide standard hourly billing rates by staff name/role with the estimated percentage of overall team effort each staff person would allocate to each service area for which it seeks pre-qualification. A spreadsheet or table format is preferred with sufficient detail for MOHCD to determine the justification for what is being included.**

MOHCD intends to award contracts to the Respondents in each service area that will provide the best overall Response to MOHCD inclusive of qualifications and cost considerations. MOHCD reserves the right to accept other than the lowest cost and to reject all responses that are not responsive to this RFQ.

* MOHCD will negotiate costs and work effort with the selected Respondent to develop a firm fixed price for the contract utilizing a blended hourly rate to compensate Respondent for all services, travel, lodging, meals, miscellaneous and any other expenses related to the completion of services. Additional and separate cost reimbursement will not be provided by the City.
* Note that hourly rates provided shall apply to any and all as-needed services requested by the City for the full contract period under this RFQ, as applicable. Please see RFQ Attachment I, Section 13.

## 

PRIOR PROJECT 1 TO DEMONSTRATE ADVISORY SERVICE EXPERIENCE

**Check one:**

* **Multifamily Housing Projects or Programs**
* **Single Family, Below Market Rate and Homeownership Programs**
* **Bond-Related Transactions**
* **Inclusionary Housing and Housing-Related Impact Fees**

|  |  |
| --- | --- |
| Project | Project Name |
| Client | Client Name (City, County, etc.) |
| Client Unit | Client Agency, Department, or Unit Name |
| Client Name and Title |  |
| Client Contact Phone |  |
| Client Contact E-mail |  |
| Timeline | Month/Year to Month/Year; Length of project beginning to end |
| Consultant Lead(s) | Staff Lead Name(s) – same as lead proposed to City? |
| Fee | $00,000.00 |
| Number of Hours | XX hours |
|  |  |
| Project Background Include background information regarding the client and/or program, as applicable. What were the project goals and desired outcomes? If different, what were the goals and desired outcomes of your services?  Insert Response Here.  Project Scope What were the project tasks your firm completed? Provide sufficient information to give the City insight into the size/complexity and scope of the project.  Insert Response Here.  Project Approach What methodologies were used, and how did those address the project goals? Describe any challenges you may have faced, including strategies you used to address them.  Insert Response Here.  Project Staffing Identify each key person on the project team with titles and roles and hourly rate, including all subcontractors. Include brief narrative descriptions of the responsibilities each person had on the project.  Insert Response Here.  Involvement of Client and/or Stakeholders Discuss how client and any stakeholders were involved in project, major opportunities for input, client staff contributions, etc.  Insert Response Here.  Project Outcomes Provide measurable service deliverables/outcomes attributed to your services? How did you add value to the client? E.g. amount of cost savings as a result of services provided, legislative or policy changes, organizational changes, or other measurable indicators of successful implementation of findings from your services.  Insert Response Here. | |