



**City and County of San Francisco**  
**Office of the Controller**  
**Mayor's Office of Housing and Community Development**

**REQUEST FOR QUALIFICATIONS FOR**  
**Real Estate Title Services**  
**RFQ#CON2017-MOHCD**

**CONTACT: Sonia Delgado-Schaumberg, [Sonia.delgado-schaumberg@sfgov.org](mailto:Sonia.delgado-schaumberg@sfgov.org), 415-701-5540**

<p><b>Background</b></p> <p>San Francisco is the fourth largest city in California and serves as a center for business, commerce and culture for the West Coast. The City and County of San Francisco (“the City”) established by Charter in 1850, is a legal subdivision of the State of California with the governmental powers of both a city and a county under California law. The City’s powers are exercised through a Board of Supervisors serving as the legislative authority, and a Mayor and other independent elected officials serving as the executive authority.</p> <p>The City seeks responses from firms demonstrating successful experience in title searches. These services will be used to assist the Mayor’s Office of Housing and Community Development with the administration and asset management of its homeownership and below market rate programs. In addition, other City departments engaged in real estate transactions may utilize the services of the selected consultants.</p>	<p><b>Intent of this Request for Qualification (RFQ)</b></p> <p>It is the intent of the Controller’s Office to create a pre-qualified list of firms from which interested City departments, boards, or commissions may choose prospective contractors on an as-needed basis.</p> <p><b>Anticipated Contract Period</b></p> <p>Respondents pre-qualified under this RFQ will remain eligible for consideration and contract negotiation on an as-needed basis for ten years from the pre-qualification notification date. Firms pre-qualified under this RFQ are not guaranteed a contract.</p> <p><b>Subcontracting Requirement</b></p> <p>The Local Business Enterprise (LBE) subconsulting goal for this Request For Qualifications (RFQ) and resulting contract(s) has been waived. However, the City strongly encourages responses from qualified LBEs. Pursuant to Admin Code Chapter 14B, rating bonuses will be in effect for any Proposers who are certified as a Small- or Micro-LBE. See the RFQ Attachment II for more information.</p>										
<p><b>Schedule*</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">RFQ Issued</td> <td>11-09-2017</td> </tr> <tr> <td>Deadline for RFQ Questions</td> <td>11-15-2017 (5pm PT)</td> </tr> <tr> <td>Deadline for RFQ Answers</td> <td>11-17-2017 (5pm PT)</td> </tr> <tr> <td>Deadline for RFQ Responses</td> <td>11-30-2017 (5pm PT)</td> </tr> <tr> <td>Notice of intent to award a contract</td> <td>12-06-2017 (5pm PT)</td> </tr> </table> <p>*Dates are subject to change.</p>	RFQ Issued	11-09-2017	Deadline for RFQ Questions	11-15-2017 (5pm PT)	Deadline for RFQ Answers	11-17-2017 (5pm PT)	Deadline for RFQ Responses	11-30-2017 (5pm PT)	Notice of intent to award a contract	12-06-2017 (5pm PT)	<p><b>RFQ Questions and Communications</b></p> <p>To ensure fair and equal access to information about this RFQ, e-mail your questions to <a href="mailto:sonia.delgado-schaumberg@sfgov.org">sonia.delgado-schaumberg@sfgov.org</a>.</p> <p>Questions must be in writing and received by the Deadline for RFQ Questions. No questions will be accepted after this time with the exception of City vendor requirement questions.</p> <p>A summary of the questions and answers pertaining to this solicitation will be posted on the Office of Contract Administration’s website and emailed to proposers by the Deadline for RFQ Answers.</p>
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# 1. Introduction

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General terms used in this RFQ. The “Respondent” refers to any entity submitting a response to this Request for Qualifications (“RFQ”) to be considered for inclusion on a pre-qualified consultant list. The “Contractor” refers to the Respondent(s) awarded contracts for services under this RFQ.

## 1.1 Statement of Need and Intent

What Does the City Seek? The City and County of San Francisco, California (“City”) seeks responses from firms demonstrating successful experience in providing title services on a range of topics, broadly divided into 3 Service Areas, including:

1. *Title searches*, including web-based access to nationwide searches of title vesting and lien information for program applicants.
2. *Public Document searches*, including nationwide searches of recorded documents.
3. *Preliminary Title Reports*, including preparation of a preliminary report prior to issuing a policy of title insurance that shows the ownership of a specific parcel of land, together with the liens and encumbrances which will not be covered under a subsequent title insurance policy.

Respondents must have experience working with municipalities (or similar government agencies) on providing title services.

With Whom Will Consultants Work? Consultants will work with the Mayor’s Office of Housing and Community Development, other Controller’s Office staff, and staff from other departments.

What is the City’s Intent with this RFQ? Based on responses to this RFQ, it is the intent of the City to create a pre-qualified list of firms from which the City may select prospective Contractors on an as-needed basis for services indicated below in Section 2, Scope of Work. The City may use the pre-qualified list, at its sole and absolute discretion, for selection of firms and negotiations of contracts for ten years following establishment of the pre-qualification notification date. Contracts issued to pre-qualified firms will have terms of varying lengths depending on the City’s needs, but in no case longer than 5 years. The City reserves the right to procure services similar or identical to the services specified in this RFQ by any other means. No pre-qualified Respondent is guaranteed a contract. Respondent is guaranteed a contract. Contract extension(s) are permitted in accordance to prevailing DHR rules.

## 1.2 Background of City and County of San Francisco

What is the City? San Francisco is the fourth largest city in California and serves as a center for business, commerce and culture for the West Coast. The City and County of San Francisco, known as the “City”, was established by Charter in 1850. It is a legal subdivision of the State of California with the governmental powers of both a city and a county under California law. The City’s powers are exercised through a Board of Supervisors serving as the legislative authority, and a Mayor and other independent elected officials serving as the executive authority. The services provided by the City include public protection, public transportation, construction and maintenance of all public facilities, water, parks, public health systems, social services, planning, tax collection, and many others.

What are the City’s General Statistics?

FY14/15 size of operating budget	Approx. \$8.2 billion
FY14/15 size of capital budget	Approx. \$1 billion
FY14/15 number of budgeted FTEs	Approx. \$ 28,000

What are the Roles and Responsibilities of the City Controller's Office? The City Controller is the chief accounting officer and auditor for the City and responsible for all financial management systems, procedures, internal control processes and reports that disclose the fiscal condition of the City to managers, policy makers and citizens. The City Controller is also the auditor for the City performing financial and performance audits of departments, agencies, concessions and contracts.

Proposition C, passed by the City's voters in November 2003, amended City Charter Section 3.105 to instruct the Controller to also serve as City Services Auditor. With this role, the Controller's Office is responsible for providing objective, rigorous assessment and measurement of City service levels and effectiveness and is authorized to contract with outside, independent experts for a variety of audit services. For more information regarding City Services Auditor roles and responsibilities, visit <http://www.sfcontroller.org/index.aspx?page=42>. Please also see the [City Services Auditor Annual Work Plan, Fiscal Year 2012-13](#).

## **2. Scope of Work**

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This scope of work is a general guide to the work the City expects to be performed, and is not a complete listing of all services that may be required or desired. The City is soliciting qualifications to create a pre-qualified list of consultant firms that may be selected for the services described below.

To minimize duplication of effort and to allow the City to coordinate data requests and data available for the multiple projects solicited within this RFQ, as well as for previous and future projects, the selected Contractors' findings and data may be shared by the City with other City Contractors, as deemed appropriate by the City.

Is My Firm Expected to Propose for a Specific Project? No. The Controller's Office will create a list of consultant firms to draw from for a diverse set of possible projects that may require a range of different and varied experience. Each consultant firm should demonstrate its capabilities by providing Prior Project Descriptions as part of Attachment V. The City will negotiate the scope of services, budget, deliverables, and timeline for each project it decides to pursue. There is no guarantee of a minimum amount of work or compensation for any of the Respondents selected for pre-qualification. The City may select Contractors from the pre-qualified list in its sole and absolute discretion.

After the pre-qualified list has been established, the City may issue Request(s) for Proposals or Request(s) for Quotes to the pre-qualified consultant list to better assess qualifications for a specific scope of service, which may include staffing, scheduling, deliverable, and cost considerations.

Does the City prefer firms to form a large group or consortium to cover more services, or to focus on an area of expertise and respond individually? The City prefers individual firm responses focused on the Service Areas that the firm and its lead staff can demonstrate possession of appropriate qualifications. For any proposed Respondent partnerships, at least 75% of proposed work effort on the City's projects must come from the lead Respondent firm.

Demonstrated expertise is requested, but is not limited to, the following Service Areas:

### **2.1 Service Area 1: Title Searches**

Firms pre-qualified for work in this Service Area must provide a web-based search tool for the City to use in the day to day operations of the Homeownership and Below Market Rate Programs. The search tool must provide nationwide title and lien information.

### **2.2 Service Area 2: Recorded Document Searches**

Firms pre-qualified for work in this Service Area must provide public/recorded documents as a result of a web-based nationwide search.

### **2.3 Service Area 4: Preliminary Title Reports**

Firms pre-qualified for work in this Service Area must be able to prepare a preliminary report that shows the ownership of a specific parcel of land, together with the liens and encumbrances.

## **3. Response Requirements**

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### **3.1 Time and Place for Submission of Responses**

Responses and all related materials must be received by **5:00pm PT on Thursday, November 30, 2017**. Responses may be delivered to the Reception Desk at City Hall, Room 316 or to:

*Sonia Delgado-Schaumberg  
Mayor's Office of Housing and Community Development  
1 South Van Ness Avenue, 5<sup>th</sup> Floor  
San Francisco, CA 94103*

Postmarks will not be considered in judging the timeliness of submissions. Responses submitted by e-mail will not be accepted. Late submissions will not be considered, including those submitted late due to mail or delivery service failure. Note that Respondents hand-delivering responses to City Hall may be required to open and make packages accessible for examination by security staff.

### **3.2 Response Package**

The following items must be included in your response and packaged in a box or envelope clearly marked **RFQ#CON2017-MOHCD Real Estate Title Services RFQ**.

Complete, but concise responses, are recommended for ease of review by the Evaluation Team. Responses should provide a straightforward, concise description of the Respondent's capabilities to satisfy the requirements of the RFQ. Marketing and sales type information should be excluded. All parts, pages, figures, and tables should be numbered and clearly labeled.

- A. **One (1) flash disk or CD-ROM containing entire contents of response, including all RFQ Attachments.** All files should be submitted in unprotected PDF or Word format. Electronic files should include signatures, where applicable. RFQ attachments include:

*RFQ Attachment I*                      Acknowledgement of RFQ Terms and Conditions

<i>RFQ Attachment II</i>	Contract Monitoring Division Local Business Enterprise Forms
<i>RFQ Attachment III</i>	City's Administrative Requirements
<i>RFQ Attachment IV</i>	City's Agreement Terms and Conditions
<i>RFQ Attachment V</i>	Response Template

- B. **Three (3) complete printed copies of RFQ Attachment V.** The pages may be bound by a method of the Respondent's choosing. Respondents are advised to review RFQ Attachments I through IV before completing RFQ Attachment V to ensure they can meet the City's requirements.

## 4. Evaluation Criteria

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This section describes the guidelines used for analyzing and evaluating the responses and for Respondent pre-qualification. It is the City's intent to pre-qualify Respondent(s) that provide the best overall qualifications to the City inclusive of fee considerations. Consultant firms selected for pre-qualification are not guaranteed a contract. This RFQ does not in any way limit the City's right to solicit contracts for similar or identical services if, in the City's sole and absolute discretion, it determines the pre-qualified list is inadequate to satisfy its needs.

### 4.1 Evaluation Team

City representatives will serve as the Evaluation Team responsible for evaluating Respondents. Specifically, the team will be responsible for the evaluation and rating of the responses for pre-qualification, for conducting reference checks, and for interviews, if desired by the City.

## 4.2 Minimum Qualifications

Any response that does not demonstrate that the Respondent meets these minimum qualifications by the response deadline will be considered non-responsive and will not be evaluated or eligible for award of any subsequent contract(s).

- A) **EXPERIENCE:** Has submitted no more and no fewer than two (2) Prior Project Descriptions, as part of RFQ Attachment V response, for EACH SERVICE AREA for which it would like to be considered for pre-qualification. The services described in the Prior Project Descriptions must have been provided to public sector municipality or similar government agency clients within five (5) years from the date of this RFQ.
- B) **STAFFING:** The lead staff, including the Respondent's Project Manager and technical lead(s), proposed to be assigned to the City's project(s) must individually have had a similar lead role in both of the Prior Project Descriptions submitted for EACH SERVICE AREA.

## 4.3 Evaluation Criteria for Pre-qualification

Each RFQ response that meets the Minimum Qualifications will be evaluated in accordance with the criteria below. A Respondent must receive a score of 70 points or above out of the 100 total possible points for each Service Area to be pre-qualified for that Service Area. There is no numerical limit to the number of firms that may be pre-qualified.

### 4.3.1 Firm Qualifications – 20 points

- a) Respondent's firm history and structure, including total staff size and composition
- b) Respondent's experience providing title services to public sector municipal or similar government agency clients
- c) Pending or current litigation related to title services provided by the firm
- d) Client relationships severed for reasons other than convenience
- e) Respondent's capacity and resources to provide the services under this RFQ

### 4.3.2 Staff Qualifications – 40 points

Qualifications and educational backgrounds of lead staff members, including subcontractor staff, if applicable, proposed to perform services for the City are appropriately demonstrated for each Service Area indicated in response.

### 4.3.3 Approach and Cost – 30 points

- a) Expectations of client involvement or level of effort are appropriate, and questions demonstrate experience with providing services to comparable clients
- b) Sufficient expertise or methodology to create competitive differences that will be beneficial to the City is demonstrated
- c) Cost response is sufficiently detailed, reasonable and appropriate

#### 4.3.4 Completeness of Response Submission – 10 points

- a) Response conforms with RFQ requirements and concisely but comprehensively addresses RFQ requirements.
- b) Response is professionally presented and contains organized content and format.

#### **4.4 Contractor Selection Processes**

Respondents scoring 70 points and above for each Service Area will be added to the pre-qualified list for as-needed services in that Service Area. Due to the varied nature of the services to be performed, the City reserves the right to contract with any or all pre-qualified Respondents.

##### Selection Interviews

Following the Response Evaluation process, Respondents may be invited to interviews with the Evaluation Team. Interviews, if pursued by the City, will consist of standard questions asked of selected Respondents, and specific questions regarding individual proposals.

The City has sole and absolute discretion over whether interviews will be conducted or not to select Respondents for contract negotiations.

##### Reference Checks

Reference checks, including, but not limited to, prior clients as indicated in Attachment V Prior Project Description(s), may be used to determine the applicability of Respondent experience to the services the City is requesting and the quality of services and staffing provided to prior clients, as well as adherence to schedules/budgets and Respondent's problem-solving, project management and communication abilities, as well as performance on deliverables and outcomes, and effectiveness in meeting or exceeding project objectives.

##### Other Terms and Conditions

The selection of any pre-qualified Respondent for contract negotiations shall not imply acceptance by the City of all terms of the response, which may be subject to further negotiation and approvals before the City may be legally bound thereby.

If a satisfactory contract cannot be negotiated in a reasonable time with any pre-qualified Respondent, then the City, in its sole discretion, may terminate negotiations and begin contract negotiations with any other remaining pre-qualified Respondents.

The City, in its sole discretion, has the right to approve or disapprove any staff person assigned to a firm's projects before and throughout the contract term. The City reserves the right at any time to approve, disapprove, or modify proposed project plans, timelines and deliverables.

## 5. Protest Procedures

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### 5.1 Protest of Non-Responsiveness Determination

Within five (5) working days of the City's issuance of a notice of non-responsiveness, any consultant firm that has submitted a response and believes that the City has incorrectly determined that its response is non-responsive may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth (5<sup>th</sup>) working day following the City's issuance of the notice of non-responsiveness. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the Respondent, and must cite the law, rule, local ordinance, procedure or RFQ provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

### 5.2 Protest of Establishment of Pre-Qualified Consultant List

Within five (5) working days of the City's issuance of a notice of intent to establish a pre-qualified consultant list, any consultant firm that has submitted a responsive response and believes that the City has incorrectly selected another Respondent for pre-qualification may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth (5<sup>th</sup>) working day after the City's issuance of the notice of intent to establish a pre-qualified consultant list.

The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the Respondent, and must cite the law, rule, local ordinance, procedure or RFQ provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

### 5.3 Delivery of Protests

All protests must be received by the specified date and time deadline. If a protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that objectively will establish the date the City received the protest. Protests or notice of protests made orally (e.g., by telephone) or by fax will not be considered.

Protests must be delivered to:

E-mail:  
lily.conover@sfgov.org

Mail:  
Lily Conover, Contracts Manager  
Office of the Controller  
City Hall, Room 306  
1 Dr. Carlton B. Goodlett Place  
San Francisco, CA 94102

### 5.4 Protest Review

The Controller's Office will confirm receipt of notice of protest by Proposer.

If a Proposer submits a complete and timely protest, the Controller's Office will review notice of protest soon after receipt of the protest to determine validity of notice, including, but not limited to: (a) receipt by due date; (b) inclusion of a written statement specifying in detail each and every one of the grounds asserted for the protest; (c) signed by an individual authorized to represent the Proposer; (d) citation of the law, rule, local ordinance, procedure or RFP provision on which the protest is based; and (e) specification of facts and evidence sufficient for the City to determine the validity of the protest. The City, at its discretion, may make a determination regarding a protest without requesting further documents or information from the Proposer who submitted the protest. Accordingly, the initial protest must include all grounds of protest and all supporting documentation or evidence reasonably available to the prospective Proposer at the time the protest is submitted. If the Proposer later raises new grounds or evidence that were not included in the initial protest, but which could have been raised at that time, then the City may not consider such new grounds or new evidence. The review shall be an informal process conducted by the Controller's Office or its designee and will be based upon the information submitted by the Respondent in its protest letter. The Controller's Office will notify the Respondent in writing of its decision at the conclusion of the review. The decision of the Controller's Office is final. The evaluation of proposals will not be delayed or postponed to allow for completion of a protest process.

Protests not received within the time and manner specified will not be considered. A Proposer's failure to protest as specified above on or before the time specified above shall constitute a complete and irrevocable waiver of the ground(s) of protest and forfeit the Proposer's right to raise such ground(s) of protest later in the procurement process, in a Government Code Claim, or in other legal proceeding.