



Winston-Salem

Request for Proposals

Title: Consolidated Planning Consultant

PROPOSALS WILL BE RECEIVED UNTIL

12:00 Noon, Tuesday, September 19, 2017

in

**Purchasing Department, City Hall Building
101 North Main Street, Suite 324 Winston-Salem, NC 27101**

ADVERTISEMENT FOR PROPOSALS

Sealed proposals endorsed **Consolidated Planning Consultant** for the City of Winston-Salem will be received by the City/County Purchasing Department in Suite 324, City Hall Building, 101 North Main Street, Winston-Salem, NC, **until the date and time listed above**. Instructions for submitting proposals and/or receiving the complete RFP document specifications may be obtained during regular office hours at the same location, or by contacting Jerry Bates via email jerryjb@cityofws.org (Email is preferred) or phone 336-747-6939. The City reserves the right to reject any or all proposals.

Jerry Bates
Purchasing Director

This document IS NOT the complete proposal. To obtain the completed proposal specifications contact Jerry Bates via email jerryjb@cityofws.org, by phone 336-747-6939, or visit the Purchasing Department, City Hall Building, Suite 324, 101 North Main Street, Winston-Salem, NC during regular office hours.

Background and Scope of Work for Consolidated Planning Consulting Services

The City of Winston-Salem requests proposals for professional consulting services (“Consultant”) related to development of the 2019-2023 Consolidated Housing and Community Development Plan (“Consolidated Plan”) for Winston-Salem/Forsyth County, North Carolina. The focus of the services is citizen participation in the planning process.

I. Background

As a recipient of entitlement funds from the U.S. Department of Housing and Urban Development (HUD), the City of Winston-Salem, as the lead entity for the Winston-Salem/Forsyth Housing Consortium, develops and monitors the Consolidated Housing and Community Development Plan. Citizen participation and agency consultation are key aspects of the development process. The Community Development (CD) Department of the City of Winston-Salem is the lead agency in development of the Consolidated Plan.

The current 2014-2018 Consolidated Plan is in its final year, and CD is updating the plan for 2019 to 2023 for submission to HUD in May, 2018. Also, a key element of the Plan, the Neighborhood Revitalization Strategy, must be updated pursuant to HUD guidance in Notice CPD-16-16. Consulting services are sought to design and implement a public input process to obtain input on Consolidated Plan goals and strategies, including the Neighborhood Revitalization Strategy. More information on Consolidated Planning is available at <https://www.hudexchange.info/programs/consolidated-plan/>.

II. Purpose and Services to be Provided

The process proposed by the Consultant should include a kick-off event and workshops to obtain public input on goals and strategies for 2019 to 2023. A maximum of four events are anticipated. The Consultant will provide reports (print and electronic) to CD for each session. All focus group sessions are to be held at an easily accessible, central location. The Consultant will help to identify appropriate facilities and services to be procured by the City. The City of Winston-Salem will be responsible for event promotion.

III. Time Frame for Services

The kick-off event is to be held in early November, 2017. Follow-up workshops are to be completed in January and February, 2018. All reports are to be submitted to CD within ten days after each event. Due to the time of year of the focus groups, make-up dates in case of inclement weather also will be scheduled. Up to three planning meetings and one summary, recap meeting will be scheduled between the Consultant and CD.

IV. Prospective Participants

Although participants will be able to participate in any workshop session, the topic areas should encompass all Consolidated Planning topics, including but not limited to:

- A. Affordable Housing Needs and Strategies
- B. Neighborhood Revitalization and Economic Opportunity Needs and Strategies
- C. Homeless and Special Needs Housing Needs and Strategies

Examples of prospective participants in the sessions are listed below.

Affordable Housing Needs and Strategies: for-profit and nonprofit builders, lenders, housing advocates, neighborhood residents, neighborhood association leaders, and parties who produce, manage or sponsor affordable housing projects and elected and appointed officials.

Neighborhood Revitalization and Economic Opportunity Needs and Strategies: neighborhood residents, neighborhood association leaders, community development corporation representatives, business partners and elected and appointed officials.

Homeless and Special Needs Housing Needs and Strategies: homeless and disabled persons and their family members, representatives of agency members of the Winston-Salem/Forsyth County Continuum of Care, representatives of organizations providing housing, services or advocacy for disabled persons, and persons with other special needs (e.g.victims of domestic violence) or representatives of organizations serving these populations and elected and appointed officials.

Sessions may encompass multiple topic areas, and there may be overlap among the participants who attend the sessions.

V. Products Desired

The report for each session should fully describe the process and outcomes from the session.

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VI. General Scope of Work

The general scope of the work to be done by the Consultant is described below.

- A. Review the strategy section of the 2014-2018 Consolidated Housing and Community Development Plan to gain an understanding of the use of the information to be obtained from the sessions. It may be found at <http://www.cityofws.org/Departments/Community-Development/Planning/Reports>.
- B. Review HUD requirements for the NRSA in HUD Notice CPD-16-16, found at <https://www.hudexchange.info/resource/5159/notice-cpd-16-16-nrsas-in-the-cdbg-entitlement-program/>
- C. Meet with City staff to plan the kick-off event and focus group sessions (up to three planning meetings).
- D. Plan and design the format and agenda for all events and submit it to CD staff for review.
- E. Coordinate location and scheduling of all events with CD.
- F. Facilitate all events.

- G. Provide a written and electronic report to the City on the content and outcomes of all events in a format developed through planning meetings.
- H. Provide the City with a written report summarizing public input for development of the Neighborhood Revitalization Strategy and the geographic area for the Neighborhood Revitalization Strategy Area. The City will draft the NRSA strategy and the City will map the NRSA.

VII. Qualifications and Preferences

- A. Availability of and proficiency in using Microsoft Word, Excel, PowerPoint, Adobe Acrobat/Reader, Internet browser, and email.
- B. Demonstrated ability to organize and facilitate group processes.
- C. Experience facilitating focus group sessions on housing, neighborhood revitalization, economic development, and related topics in settings similar to those described herein is preferred.
- D. Experience as a participant, leader or facilitator in strategic planning processes.
- E. Knowledge of institutional structure and organizations in Winston-Salem and Forsyth County.
- F. Availability to start work upon execution of a contract with the City and to schedule planning meetings with the City to organize a process to get the work done.
- G. Availability and commitment to attend all required meetings and meet all deadlines.
- H. The City of Winston-Salem is committed to spending funds within the local economy and when possible, with local Minority/Woman Business Enterprise (M/WBE) businesses. Local vendors are defined as any business with a physical address location (not including Post Office boxes) within the corporate limits of Winston-Salem.
- I. The City of Winston-Salem does not discriminate on the basis of race, sex, color, age, national origin, religion, or disability in its employment opportunities, programs, or service.

VIII. Submission Requirements

Proposals must include:

- A. The Consultant's name, mailing address, email address, and phone and fax numbers.
- B. A description of the scope of work to which the Consultant will commit.
- C. The proposed contract amount and a proposed payment schedule.
- D. A description of the basis for all cost items, e.g. hours of work and hourly rate for each type of activity, including planning, facilitating and reporting.
- E. A projected per session cost for the kick-off, each workshop and each planning meeting.
- F. A list of all of the persons (including the principal and any employees or subcontractors) to be involved in carrying out the proposed work, describing each person's qualifications and proposed

involvement in specific tasks. Attach a resume for each person.

- G. A list and description of similar work completed in the last five years.
- H. Contact information for references from at least two organizations for which work similar to that proposed has been done. Include the reference's name, organization, telephone number and email address. For each reference, please describe how the work compares to that proposed.
- I. A copy of a report, study, presentation or other item which illustrates the Consultant's writing style and ability.
- J. Any additional information or materials relevant to the Consultant's availability, qualifications and capacity to do the work.
- K. Authorization for the City to verify references.

IX. Review and Selection Process

The proposal submitted will be the primary source of information used in the evaluation process. The City will review all proposals against the qualifications, preferences, submission requirements and scope of work described in this RFP. For any proposal to be deemed responsive, the Consultant must provide appropriate detail to demonstrate satisfaction of each criterion and compliance with the performance provisions outlined in this RFP. Proposals must contain information specifically related to the services requested herein. Failure to submit information requested may eliminate the proposal from further evaluation.

Proposals will be assessed to determine the most comprehensive, competitive and best value solution for the City. Criteria used and estimated rating points available, shall be based on, but not limited to, the criteria described herein, which are summarized below by major category:

- Experience, Skills, Capacity and Availability (50%)
- Proposed Approach and Methodology (20%)
- Responsiveness, Cost Effectiveness and Value (30%)

The City may utilize a local panel to review proposals and recommend a selection. The City reserves the right to modify the evaluation criteria or waive portions thereof. Interviews may be requested with potential consultants prior to selection.

X. Timeline

The City and Consultant will negotiate mutually agreeable timelines for commencement and completion of the project, as well as for scheduling of specific tasks. It is anticipated that the Consultant will be selected by **September 29, 2017**. The target for completion of the work is **February 28, 2018**.

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