

CITY OF PACIFIC GROVE
DEPARTMENT OF COMMUNITY AND ECONOMIC DEVELOPMENT
HOUSING DIVISION

**NOTICE INVITING SEALED PROPOSALS FOR HOUSING
REHABILITATION LOAN PROGRAM INSPECTION AND PROJECT
OVERSIGHT**

The City of Pacific Grove (City) invites sealed proposals for Housing and Rehabilitation Loan Program Project Coordination and Inspection Services. All proposals submitted shall meet the following terms and conditions:

1. Proposals shall be delivered to the office of the City Clerk at City Hall, 300 Forest Avenue, Pacific Grove, CA 93950, not later than 2:00 PM on January 18, 2019, at which hour and date all proposals will be publicly opened. Proposals shall be submitted in a sealed envelope, and the outside of the envelope shall be clearly marked, "HOUSING REHABILITATION LOAN PROGRAM PROJECT INSPECTION AND OVERSIGHT". It is sole responsibility of the bidder to see that the bid is received in proper time. Any proposals received after the scheduled closing time shall be rejected.

2. Any bidder may withdraw his or her bid, either personally or by written request at any time prior to the scheduled closing time for receipt of proposal, but no bidder may withdraw his or her bid for a period of thirty (30) days after the opening thereof.

3. All proposals submitted shall include a completed "Proposal", identifying unit costs and qualifications to do the work. The work performed under this contract must conform to requirements of the specifications, which are included in the bidder package.

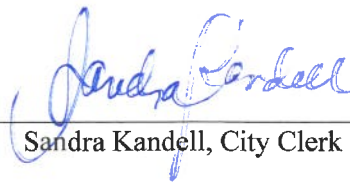
4. The contract will be awarded to the bidder whose work, in the opinion of the City will best meet the requirements of the City. It is clearly understood by all bidders that the City reserves the right to reject any and all proposal and to waive informalities in said proposal.

5. A Bidder's Package, including bidder specifications, special requirements and sample contract and forms may be viewed and an electronic copy can be obtained at the City Clerk's Office, located at 300 Forest Avenue, Pacific Grove, CA, 93950, (831) 648- 3181.

6. The contact person for technical questions concerning project specifications, the bid process and general project information should be directed to Terri Schaeffer, City of Pacific Grove Housing Program Manager, via e-mail at tschaeffer@cityofpacificgrove.org or by phone at (831) 648-3182.

Dated: _____

1/2/2019



Sandra Kandell, City Clerk



**CITY OF PACIFIC GROVE
HOUSING DIVISION
REQUEST FOR PROPOSAL
FOR PROFESSIONAL SERVICES**

**FOR HOUSING REHABILITATION LOAN PROGRAM PROJECT
OVERSIGHT AND INSPECTION**

PROPOSAL SUBMITTAL DEADLINE:

DATE: January 18, 2019

TIME: 2:00 PM

LOCATION: CITY OF PACIFIC GROVE

**PROJECT MANAGER: TERRI SCHAEFFER, CITY OF PACIFIC
GROVE HOUSING PROGRAM MANAGER**

**CITY OF PACIFIC GROVE
COMMUNITY AND ECONOMIC DEVELOPMENT DEPARTMENT
300 FOREST AVENUE
PACIFIC GROVE, CA 93950
(831) 648-3183**

REQUEST FOR PROFESSIONAL SERVICES

TITLE: Professional services for inspection and project oversight for the Housing Rehabilitation Loan Program

I. General Information

Information about City of Pacific Grove

The City of Pacific Grove (City) has a population of 15,545 and offers an unparalleled quality of life. Sharing borders with the Monterey Bay, City of Monterey, Pacific Ocean, and the Del Monte Forest, Pacific Grove is approximately 2.86 square miles and 55.2 miles in streets length.

We are known for our small-town hospitality and friendliness in a place we simply call “PG” The City website is www.cityofpacificgrove.org.

II. INTRODUCTION

The City is seeking proposals from qualified individuals or firms to provide project construction oversight and inspection services for the Housing Rehabilitation Loan Program. (see program description on City website at <https://www.cityofpacificgrove.org/living/community-economic-development/housing/housing-rehabilitation-loan-program>) These services are part-time based on available funding. The contractor must be able to provide these services in a timely manner when applicants are qualified and funding is available.

III. Objective

The Objective of the Housing Rehabilitation Loan Program is to provide financial assistance with low interest loans to low income homeowners to complete health, safety and general repairs on owner occupied single family dwellings. The City also assists the borrower/homeowner with property inspection, cost estimation, project bidding, permit applications, contract management and project payments.

IV. Scope of services

A. Project Description

This project involves experienced staff to conduct Housing Rehabilitation Inspections and Project Oversight to develop work write ups for Community Development Block Grant program borrowers. Specialized skills, such as cost estimating and property inspection for each unique housing rehabilitation loan program project are required. Experience in housing rehabilitation projects as a project manager, construction manager, construction proposal and design manager as well as home inspections and customer service skills are indicated.

Ability to work with low income, vulnerable homeowners on project planning and cost estimating are also required, and ability to assist homeowners with contract negotiation desired.

The bidder shall thoroughly examine and become familiar with all parts of this Request for Proposal (RFP) requirements and specifications, the nature and scope of the work detailed, and all local, state and federal regulations, as it pertains to this RFP. A copy of the City's Housing Rehabilitation Loan Program Guidelines can be found on the City website at <https://www.cityofpacificgrove.org/living/community-economic-development/housing/housing-rehabilitation-loan-program>, under the Housing tab located on the Community and Economic Development Department's page.

Professional services are required and the City is not precluded from considering price once satisfied the bidder has the demonstrated competence and necessary qualifications. The selection for professional services will be based on the contractor's demonstrated competence and the professional qualifications necessary for the satisfactory performance of the services required.

B. Description of Required Services

1. Initial Inspections: Pre-loan inspections to be conducted on private properties for homeowners who qualify for the Housing Rehabilitation Loan Program. Contractor will personal vehicles, cell phones, ladders, flashlights, tape measures, cameras etc. to conduct comprehensive home inspection and note any deficiencies on a City supplied inspection report. The report should also include homeowner descriptions of work requested.
2. Prepare Work Write-Up: Based on inspection and confirmation with homeowner and City staff, contractor will draft a comprehensive Work Write-Up on a City supplied document for review by owner and staff. (sample form available upon request)
3. Prepare estimates: Contractor will develop cost estimates for work to be completed based on Work Write-Up for the review by the Loan Committee and pre-bid process.
4. Schedule third party pre-construction inspections: Contractor will coordinate and schedule pre-construction inspections as needed and obtain required reports, process payments to third party inspectors, such as termite and lead-based paint inspections.
5. Conduct open house for Project Bid: Contractor will coordinate with homeowner an open house for interested construction contractors to bid on the project. Contractor will prepare all documentation required for bidding process as per City standards.

6. Construction contract selection: Contractor will coordinate meeting with homeowner to discuss selection of construction contractor; prepare construction contract; and facilitate construction contract signing. Contractor will also confirm all appropriate licenses for all contracted workers.
7. Monitor construction activity: Conduct routine site visits of project site; document construction activity via communication log; process change orders as needed. Coordinate with City Building Department as needed.
8. Process disbursement requests: Review invoices with homeowner, when agreement for work complete, process payments through disbursement from escrow account. Track payments through simple accounting on spreadsheet.
9. Post construction activity: After final building inspection, process completion activities, including notice of completion, final homeowner inspection, lien releases and final payment documentation.
10. Recordkeeping: Contractor will keep all records of all activities on each project using forms provided by the City and following all State and Federal guidelines. Final records will be reviewed with staff and filed accordingly.
11. Program Representative: Contractor will be available as needed to represent the program and projects at Loan Committee hearings, outreach events and any other program related situation requested by the City.

V. Requirements

The submitted proposal should include qualifications for facilitating the Scope of Work and experience along with the BID PROPOSAL FORM

a. The proposal must include detailed description of the following:

- Organizational structure, other business affiliations, number and location of offices, and total number of professional staff. If sole proprietor, description of business affiliations.
- Experience with housing inspections and Federal housing programs such as CDBG and Section 8 or any other home inspection service.
- Experience helping property owners plan home renovation and repair projects.
- Experience working with low income and vulnerable populations, for example, elderly, disabled, or other vulnerable occupants.
- References: at least 3 customers or other entities where similar rehabilitation work was performed.
- The successful bidder must possess the following:
 - Valid California Driver's License
 - General Contractor License desired but not required.

b. Proposal Content Requirements

- Title Page
- Narrative about why your company is uniquely qualified for selection
- Experience and Qualifications
- Cost of service

c. Expected Timeline

- RFP issued- January 3, 2019
- RFP closes- January 18, 2019

VI. Addenda to the Request for Proposals

In the event that it becomes necessary to revise any part of this RFP, addenda will be provided to all those invited to respond.

VII. Submission of Proposals

Sealed proposals are being requested for HOUSING REHABILITATION LOAN PROGRAM PROJECT OVERSIGHT AND INSPECTION, to the City of Pacific Grove, in accordance with all terms and specifications contained herein.

Three (3) hard paper copies of sealed Proposals must be received by January 18, 2019 to the address below by 2:00 PM.

All sealed Proposals must be plainly marked in the lower left-hand corner, "Housing Rehabilitation Loan Program Project Oversight and Inspection" and sent to the following address:

City of Pacific Grove City Clerk's Office
Attn: Sandra Kandell
300 Forest Avenue
Pacific Grove, CA 93950

Questions concerning the RFP or contract related questions can be addressed to Terri Schaeffer, Housing Program Manager. Ms. Schaeffer can be reached at tschaeffer@cityofpacificgrove.org or by phone at 831-648-3182. Clarifying questions are encouraged as we believe these will add to the quality of the proposals. All additional questions received, and the City's response will be posted on the City website at www.cityofpacificgrove.org

VIII. Late Proposals

Late proposals will not be accepted.

IX. Evaluation and Selection Process

The City will make every attempt to evaluate the proposals quickly.

X. Contract

The contracted firm will be required to sign a contract with the City relating to the work to be performed. Sample contract available in the City Clerk's office.

XI. Response Material Ownership

The material submitted in response to the RFP becomes the property of the City and will be returned to the Contractor only at the City's option. Responses may be reviewed by any person after the final selection has been made. The City has the right to use any or all ideas presented in reply to this request. Disqualification of a Contractor does not eliminate this right.

XII. Acceptance of Proposal Content

The contents of the proposal of the successful Contractor may become contractual obligations if the City wishes to execute a contract based on the submitted proposal. Failure of the successful Contractor to accept these obligations in a contract may result in cancellation of the award and such Contractor may be removed from future solicitations.

XIII. Reference Checks

The City reserves the right to contact any reference or any client listed in the documents for information which may be helpful to the City in evaluating the Contractor's performance on previous assignments.

XIV. General Conditions of RFP

- a. The City reserves the right to reject any and all proposals, to waive any informality, to request interviews of Contractor prior to award and to select and negotiate the professional services in the best interest of the City.
- b. The Contractor shall guarantee to perform the services offered and the total price of the proposal for a period of not less than 60 days from the deadline for submission of proposals.
- c. The City reserves the right to accept all or part of any proposal, and to negotiate a contract for services and cost with the selected Contractor.

- d. The Contractor shall provide all necessary personnel, materials and equipment to perform and complete all work under this proposal.
- e. The Contractor shall be unbiased and vendor neutral.
- f. The City intends to award a contract the requested services within one (1) month of receipt of the proposals. The Contractor shall be prepared to commence work immediately upon execution of a contract with the City.
- g. Unless otherwise stated, Contractor invoices are to be submitted to the Housing Division upon delivery of service to the City. The invoice must include an itemization of all services provided, including unit list price, net price, extensions total amount(s) due, and amounts previously paid.
- h. Unless otherwise stated, payment will be made within thirty (30) days of the completion of the service, in an acceptable fashion, to the City and receipt of invoice, whichever is later.
- i. This contract will be for the services described in the RFP response; however, this agreement should not be considered exclusive. As deemed necessary, the City reserves the right to obtain these services from any other vendor.
- j. Unless otherwise specified all costs listed are firm for the term of the contract.
- k. Neither party shall be liable for any inability to perform its obligations under any subsequent agreement due to war, riot, insurrection, civil commotion, fire, flood, earthquake, storm or other act of nature.
- l. Notification of the parties shall be considered to have been constructively received when it is mailed via the United States Postal Service, delivered in hand or by email to the parties as stated in the contract.
- m. Proposal shall also mean quotation, bid, offer, qualification/experience statement, and services. Proposers shall also mean vendors, proposers, or any person or firm responding to a Request for Information.
- n. All contracts entered into by the City shall be governed by the Laws of the State of California. Venue shall be in Monterey County, City of Pacific Grove.

**RFP SCHEDULE
CITY OF PACIFIC GROVE HOUSING REHABILITATION LOAN PROGRAM
PROJECT COORDINATION AND INSPECTION**

Inspection and office work as scheduled on an Hourly Rate

CONTRACTOR to provide all labor and equipment to inspect properties:

Routine Services Required

- Site Inspections
- Project Estimation
- Project Construction Oversight
- Project Documentation

Combined Services Hourly Rate _____

Total Number of Employees _____

Award will be based on experience along with the Hourly Rate amount. The City is not precluded from considering price once satisfied the bidder has the demonstrated competence and necessary qualifications.

BID PROPOSAL FORM

**FOR HOUSING REHABILITATION LOAN PROGRAM PROJECT
COORDINATION AND INSPECTION PRIVATELY OWNED CITY
PROPERTIES**

Date: _____

I/We _____ the undersigned, do hereby propose to furnish the City of Pacific Grove, California, a **HOUSING REHABILITATION LOAN PROGRAM PROJECT OVERSIGHT AND INSPECTION** Proposal, in accordance with all terms and specifications contained herein:

Attach one (1) copy of your proposal package.

Name of Firm: _____

Signature & Title: _____

Address: _____

Phone Number: _____

Email Address: _____

Contractor shall answer to the following questions by circling the appropriate response or completing the blank provided:

Company Profile:

Is your firm? (Please circle one)

- | | | | |
|----|---------------------|-----|----|
| A. | SOLE PROPRIETORSHIP | YES | NO |
| B. | PARTNERSHIP | YES | NO |
| C. | CORPORATION | YES | NO |

List Legal Names of Company:

References: List at least three (3) local property owners of same general size and billing numbers and frequency where the **same/similar services**, as stated **herein**, have been **provided**. (Note: lack of three comparable projects will not disqualify proposer.)

LOCAL NAME

Contact Person

Title

Address

P.O. Box

City

State

Zip

Phone Number

Fax Number

LOCAL NAME

Contact Person

Title

Address

P.O. Box

City

State

Zip

Phone Number

Fax Number

LOCAL NAME

Contact Person

Title

Address

P.O. Box

City

State

Zip

Phone Number

Fax Number

RFP Clarification

The amount of work to be requested during the contract period cannot be well defined at the outset, and there is no guaranteed minimum amount of work that may be assigned by City under the contract. The bidder agrees to do the work on an on-call basis in such increments and at such times and a location as will be defined in written requirements to be issued by the City as the need arises. The bidder agrees that the offer to do the work at the unit prices submitted with the bid schedule remains in effect for all written work requirements as herein described and issued by the City during the contract period beginning with the date of the contract award.

A unit price and amount must be entered for every bid item in order for a bid proposal to be considered for award of contract. The contract will be awarded on the total daily rate (including all labor, equipment and materials).

The intent of this contract is to provide the City with a readily available work force for housing rehabilitation inspection and project oversight as the City deems appropriate. This contract does not give the Contractor exclusive rights to perform all inspections done by the City.

**Attachment B
CERTIFICATE OF INSURANCE**

This is to certify that the following endorsement is part of the policy(ies) described below:
 NAMED INSURED (CONTRACTOR) COMPANIES AFFORDING
 COVERAGE

ADDRESS:

- A.
- B.
- C.

COMPANY (A. B. C.)	COVERAGE	POLICY NUMBE R	EXPIRATION DATE	LIMITS		
				B.I.	P.D.	AGGREGATE
	AUTOMOBILE LIABILITY <input type="checkbox"/> GENERAL LIABILITY <input type="checkbox"/> PRODUCTS /COMPLETED <input type="checkbox"/> OPERATIONS <input type="checkbox"/> BLANKET CONTRACTUAL <input type="checkbox"/> CONTRACTOR'S <input type="checkbox"/> PROTECTIVE <input type="checkbox"/> PERSONAL INJURY <input type="checkbox"/> OTHER <input type="checkbox"/> EXCESS LIABILITY <input type="checkbox"/> WORKERS' COMPENSATION <input type="checkbox"/>					

It is hereby understood and agreed that the City of Pacific Grove, its City Council and each member thereof and every officer and employee of the City shall be named as joint and several assureds with respect to claims arising out of the following project:

It is further agreed that the following indemnity agreement between the City of Pacific Grove and the named insured is covered under the policy: CONTRACTOR agrees to indemnify, hold harmless and defend City, its City Council and each member thereof and every officer and employee of City from any and all liability or financial loss resulting from any suits, claims, losses or actions brought against and from all costs and expenses of litigation brought against City, its City Council and each member thereof and any officer or employee of City which results directly or indirectly from the wrongful or negligent actions of CONTRACTOR's officers, employees, agents or others employed by CONTRACTOR while engaged by CONTRACTOR in the (performance of this agreement) construction of this project.

It is further agreed that the inclusion of more than one assured shall not operate to increase the limit of the company's liability and that insurer waives any right on contribution with insurance which may be available to the City of Pacific Grove.

In the event of cancellation or material change in the above coverage, the company will give 30 days' written notice of cancellation or material change to the certificate holder.

Except to certify that the policy(ies) described above have the above endorsement attached, this certificate or verification of insurance is not an insurance policy and does not amend, extend or alter the coverage afforded by the policies listed herein. Notwithstanding any requirement, term, or condition of any contract or other document with respect to which this certificate or verification of insurance may be issued or may pertain, the insurance afforded by the policies described herein is subject to all the terms, exclusions and conditions of such policies.

DATE: _____ BY: _____
Authorized Insurance Representative

AGENCY: _____ TITLE: _____
 _____ ADDRESS: _____