



**SACRAMENTO  
HOUSING AND REDEVELOPMENT  
AGENCY**



8

January 5, 1988

Budget & Finance Committee of  
the City Council  
Sacramento, CA

Honorable Members in Session:

SUBJECT: Approval of Request for Proposals for Consultant to  
Staff Sacramento Heritage, Inc.

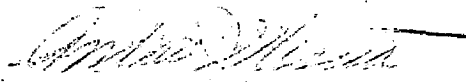
SUMMARY

The attached report is submitted to you for review and  
recommendation prior to consideration by the Redevelopment Agency  
of the City of Sacramento.

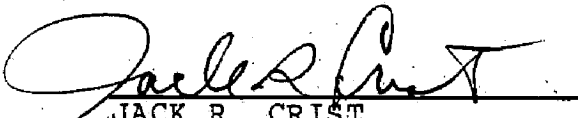
RECOMMENDATION

The staff recommends approval of the attached resolution  
approving the proposed Request for Proposals.

Respectfully submitted,

  
WILLIAM H. EDGAR  
Executive Director

TRANSMITTAL TO COMMITTEE:

  
JACK R. CRIST  
Deputy City Manager

Attachment



**SACRAMENTO  
HOUSING AND REDEVELOPMENT  
AGENCY**



January 4, 1988

Redevelopment Agency of the  
City of Sacramento  
Sacramento, CA 95814

Honorable Members in Session:

**SUBJECT:** Approval of Request for Proposals for Consultant to  
Staff Sacramento Heritage, Inc.

SUMMARY

This report recommends approval of the issuance of a Request for Proposals to solicit the services of a consultant to staff Sacramento Heritage, Inc.

BACKGROUND

Sacramento Heritage, Inc. (Heritage) was founded in 1975 for the purpose of acquisition, improvement, restoration, and disposition of historically or architecturally significant real properties in the City of Sacramento. The non-profit organization has participated in several rehabilitation projects since its inception, acting variously as developer and/or investor.

Recently, Heritage has assisted in the administration of the Developer Assistance Program, financed by the Sacramento Housing and Redevelopment Agency, which provides loans and grants for the improvement of properties in the Merged Downtown Project Area.

Sacramento Housing and Redevelopment Agency staff has traditionally provided staff services for Heritage. However, the increase in downtown redevelopment activities and the progress of major Sacramento Housing and Redevelopment Agency projects, render staff incapable of providing adequate services to Heritage. Staff, therefore, seeks the permission of the Sacramento Housing and Redevelopment Agency to hire a consultant to assist Heritage.

1-19-88  
All Districts

# SACRAMENTO HOUSING AND REDEVELOPMENT AGENCY

Redevelopment Agency  
of the City of Sacramento  
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The Request for Proposals (RFP), attached as Exhibit I, has been approved by the Board of Directors of Sacramento Heritage, Inc. The duties of the consultant, as outlined in the RFP, will be to identify and implement Heritage rehabilitation projects, to locate public and private sources of funding for such projects, to implement promotional programs, and perform related tasks at the direction of the Heritage Board of Directors. The consultant will dedicate 20 hours of service per week to Heritage, and will begin work in late February.

## FINANCIAL DATA

The consultant will be paid \$25,000 for the one-year contract. This amount will cover all requisite costs, including clerical services, travel and salary. The contract will be funded, to the greatest extent possible, by savings in the downtown tax increment administrative budget (cost center A00200). It is anticipated that two positions funded by downtown tax increment will remain vacant for a portion of 1988. These savings will be applied toward the consultant contract. The balance of the contract will be funded from the downtown Developer Assistance Program.

## ENVIRONMENTAL REVIEW

The proposed contract does not require environmental review pursuant to the California Environmental Quality Act.

## POLICY IMPLICATION

Approval of the RFP for a consultant to provide staff services to Heritage represents a policy change on the part of the Sacramento Housing and Redevelopment Agency, as these services have traditionally been provided by Sacramento Housing and Redevelopment Agency staff members.

## VOTE AND RECOMMENDATION OF COMMISSION

At its regular meeting of January 4, 1988, the Sacramento Housing and Redevelopment Commission adopted a motion recommending approval of the attached resolution. The votes were as follows:

AYES: Glud, Moose, Simon, Simpson, Wiggins, Wooley, Yew, Amundson

NOES: None

ABSENT: Pettit, Sheldon


# SACRAMENTO HOUSING AND REDEVELOPMENT AGENCY

Redevelopment Agency  
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## RECOMMENDATION

The staff recommends adoption of the attached resolution which approves the Request for Proposals for a consultant to staff Sacramento Heritage, Inc.

Respectfully submitted,

  
WILLIAM H. EDGAR  
Executive Director

WHE/WS:cmc

Transmittal to Council:

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WALTER J. SLIPE  
City Manager

Contact Person: Thomas V. Lee, 440-1355

2630J

# RESOLUTION NO.

ADOPTED BY THE REDEVELOPMENT AGENCY OF THE CITY OF SACRAMENTO

ON DATE OF

January 19, 1988

REQUEST FOR PROPOSALS  
FOR A CONSULTANT TO STAFF  
SACRAMENTO HERITAGE, INC.

BE IT RESOLVED BY THE REDEVELOPMENT AGENCY OF THE CITY  
OF SACRAMENTO:

Section 1: The Request for Proposals for a consultant to provide staff services to Sacramento Heritage, Inc., as set forth in the staff report filed with this resolution, is hereby approved.

Section 2: The Executive Director is authorized to allocate Funding from the Downtown Redevelopment/ Economic Development administrative account, the Developer Assistance Program account, or both, in an amount not to exceed \$25,000 for payment of such consultant.

\_\_\_\_\_  
CHAIR

ATTEST:

\_\_\_\_\_  
SECRETARY

1100WPP2(13)

## REQUEST FOR PROPOSALS

COORDINATOR FOR SACRAMENTO HERITAGE, INC.

A NON-PROFIT CORPORATION

The Sacramento Housing and Redevelopment Agency is interested in retaining a consultant to develop and implement programs to encourage the rehabilitation of historical buildings within the City of Sacramento, depicted on the map attached. The consultant will work with Sacramento Heritage, Inc., a non-profit corporation.

Sacramento Heritage, Inc. was founded in 1975 for the specific and primary purposes of acquisition, improvement, restoration, preservation, leasing and disposition of historically or architecturally significant real properties in the City of Sacramento; to provide housing for moderate- and low-income persons on a non-profit basis; and to assist with the provision of related facilities and services designed to enhance the physical and social well-being of members of the downtown Sacramento community.

Sacramento Heritage, Inc. has a tax-exempt status, and as a publicly supported organization, may accept bequests, legacies, devisees, transfers or gifts. Such donations are deductible from federal and state taxes.

In the past, Sacramento Heritage, Inc. relied upon tax incentives to encourage the donation of real property. Sacramento Heritage would then sell the property to a developer with the agreement that it would be rehabilitated. More recently, Sacramento Heritage, Inc. has administered loan and grant programs, financed by the Sacramento Housing and Redevelopment Agency, geared toward the improvement of properties in the Merged Downtown Sacramento Project Area. Sacramento Heritage, Inc. now seeks to employ funding available through federal programs (such as Housing and Urban Development 312 rehabilitation loans) for the rehabilitation of buildings in downtown Sacramento.

### SCOPE OF WORK

1. Identify state and federal programs which provide funding for projects applicable to the goals of Sacramento Heritage, Inc.
2. Locate buildings of historic and architectural merit within the City of Sacramento. Assess the market potential for the building if rehabilitated for commercial, residential or mixed-use.

3. Develop proforma analyses for such rehabilitation projects, and identify the financial mechanisms available.
4. Prepare loan and grant applications.
5. Market the loan programs.
6. Seek private funds for rehabilitation projects.
7. Develop and implement programs to promote Sacramento Heritage, Inc.'s activities and increase the awareness of Sacramento's historical and architectural heritage.
8. Prepare a monthly status update for the Sacramento Heritage, Inc. Board of Directors.
9. Perform other related tasks as directed by the Sacramento Heritage, Inc. Board of Directors.

Within the framework of the above accomplishments, the consultant will be required to submit a detailed work program for the contract period within 30 days of the commencement of the contract which will be approved by the Sacramento Heritage Board of Directors and the Executive Director of the Agency. The work program shall specify how the above activities will be accomplished within the term of the contract and identify specific actions along with associated costs and timeframes required to meet the work program. The work program shall be developed so as to indicate anticipated progress on a monthly basis with significant activities and key elements that are to be accomplished. The consultant will also submit monthly performance reports detailing progress in meeting work program goals for review by the Sacramento Heritage, Inc. Board of Directors and the Executive Director of the Agency. Funds will only be disbursed based upon progress and documentation of actual services performed as identified in the work program.

#### FUNDING AND DURATION OF CONTRACT

Twenty-five Thousand Dollars (\$25,000) is available for the one year consultant contract, which must cover all requisite costs, e.g. clerical services, travel and salary. A minimum of 20 hours per week is to be spent on the project. In no event, without prior approval by the Agency, shall the monthly compensation exceed \$2,084.

PROPOSAL SUBMISSION AND FORMAT

A written proposal is solicited. Five (5) copies should be sent to the attention of:

Sacramento Housing and Redevelopment Agency  
c/o Joan Roberts, Agency Clerk  
Administration Department, Third floor  
630 "I" Street  
Sacramento, CA 95814

The proposal must be received on or before 5:00 p.m., Wednesday, February 10, 1988. Late proposals will be returned unopened.

FORMAT

Your proposal is to be submitted in the following format:

- Cover or transmittal letter, executed by an authorized signatory of your firm or the individual contractor submitting the proposal, not to exceed one (1) page.
- Detailed statement on the services to be provided, including the approaches and methods to be used and a tentative annual work program organized on a monthly basis, not to exceed five (5) pages.
- Detailed statement of experience with development and/or loan corporations, especially experience involving construction and/or loan packaging, including a list of relevant clients or employers, and the names and phone numbers of persons who can be contacted regarding your experience, not to exceed one (1) page.
- Detailed statement of experience with Housing and Urban Development 312 Rehabilitation Loans, not to exceed one (1) page.
- Detailed statement of experience with Urban Development Action Grants, not to exceed one (1) page.
- Detailed statement of experience with Small Business Administration loans, not to exceed one (1) page.
- Detailed statement of experience with historic rehabilitation projects and/or other construction projects, not to exceed one (1) page.
- Detailed statement of experience with the provision of low-to moderate-income housing, not to exceed one (1) page.



- Detailed statement of experience in marketing loan programs, not to exceed one (1) page.
- Detailed statement of experiences that demonstrate knowledge of Sacramento's architectural heritage, not to exceed one (1) page.
- Detailed statement of experiences that demonstrate experience with the downtown Sacramento business community, not to exceed one (1) page.
- If the responding entity involves more than a single individual, describe your firm's affirmative action, equal employment program, and identify your current mix of female and minority employees in relation to your entire workforce, not to exceed one (1) page.
- Resumes of the key personnel from your firm assigned to this contract.

Contract award will be based upon the responses in the maximum sixteen (16) pages allotted above, along with the resumes and any additional materials or information specifically requested by the Agency. All materials requested shall be contained in a single document and shall be retained by the Agency.

The Agency reserves the right: To reject any or all proposals submitted; to request clarification of information submitted and/or to request additional information of one or more competitors; and the right to waive any irregularity in the proposal submission and review process. An award, if made, will be made to the firm/individual best qualified and whose proposal is deemed to be in the best interest of the Agency.

#### SELECTION CRITERIA

The Executive Director of the Agency will make the final contract award; however, recommendations will be made by a selection committee to the Sacramento Heritage, Inc. Board of Directors. The Board of Directors will forward their recommendation to the Executive Director. The selection committee will be comprised of the Sacramento Housing and Redevelopment Commissioner appointed to Sacramento Heritage, Inc., two Sacramento Heritage, Inc. Board members, one Agency staff person, and one person appointed by the Chairman of the Board of Sacramento Heritage, Inc.

The selection committee will make its recommendation by reviewing and evaluating written proposals according to the criteria listed below. Additional questions may be asked of proposers, and formal interviews may be conducted as well. Proposers will be notified of any additional required information or interviews after written proposals have been evaluated.

Evaluation criteria and the relative weight assigned to each are listed below:

WRITTEN EVALUATION

- |  |     |
|--|-----|
| 1. Quality of the proposed work plan.  | 25% |
| 2. Experience in identifying market potential for rehabilitation projects and marketing commerical property.   | 15% |
| 3. Experience in administration of loan programs and knowledge of currently available funding for commercial and low- to moderate-income housing projects. | 10% |
| 4. Experience in financial analysis of development projects.   | 10% |
| 5. Experience in raising private sector funds.   | 15% |
| 6. Experience in the identification and implementation of promotional activities.  | 15% |
| 7. Minority or female owned firm or Affirmative Action program.  | 10% |

(In case of a tie, first consideration will be given to Sacramento based firms/individuals.)

ORAL EVALUATION

If interviews are required the following criteria will apply:

- |   |     |
|---|-----|
| Ability to communicate orally.  | 25% |
| Experience with HUD 312 Rehabilitation Loans and/or other funding sources.                          | 15% |
| Experience with rehabilitation projects and ability to identify marketable rehabilitation projects. | 15% |
| Experience in raising private sector funds.   | 15% |
| Experience with promotional activities.   | 10% |
| Sensitivity to community - evaluation and identification of community issues, local history.        | 20% |

The Agency retains the right to reject any and all proposals. A decision may be made on the basis of an evaluation of the written proposals only. If no interviews are necessary, the written proposals will constitute 100% of the selection decision. Otherwise, if interviews are held, written proposals will constitute 50% and the interviews 50% of the selection decision.

The Agency may, at its discretion, add additional criteria prior to the time of selection including past performance, if contractor has previously been under contract with the Agency.

The individual/firm selected for contract award will enter into a contract with the Agency which will include all standard conditions of such contracts.

The Sacramento Heritage, Inc. Board of Directors will discuss potential projects to be undertaken by the consultant at their regular meeting on January 12, 1988, at 5:00 p.m. in the First Floor Conference Room, 630 "I" Street, Sacramento, California. All interested persons are welcome to attend.

TENTATIVE SELECTION SCHEDULE

Sacramento Housing and Redevelopment Commission approval to solicit RFP's	January 4, 1988
Budget and Finance Committee	January 12, 1988
Redevelopment Agency of the City of Sacramento approval to solicit RFP's	January 19, 1988
Proposal Due Date	February 10, 1988
Selection Completion	February 17, 1988
Contract Period	February 29, 1988- February 29, 1989

Contact Person: Thomas V. Lee  
Assistant Director, Community Development  
Sacramento Housing and Redevelopment Agency  
630 "I" Street  
Sacramento, CA 95814  
(916) 440-1355

R I V E R

S A C R A M E N T O

(11)

