



## Town Council Agenda Report

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Date: June 23, 2020 Item No. 4

To: Honorable Mayor and Town Council

Subject: REQUEST FOR PROPOSALS, PREPARATION OF THE 2021-2029 HOUSING ELEMENT UPDATE

From: Douglas Robertson, Town Manager

Submitted by: Lori Lamson, Assistant Town Manager

Budgeted Item:  Yes  No  N/A

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### RECOMMENDED ACTION:

Authorize and direct staff to circulate a Request for Proposal for the preparation of the 6<sup>th</sup> Cycle 2021-2029 Housing Element Update for the Town of Apple Valley.

### SUMMARY:

State law requires every jurisdiction's Housing Element be updated every eight (8) years. The last update of the Housing Element was completed and certified by the State of California Department of Housing and Community Development (HCD) in 2013. The new cycle requires the Town to complete an update of the Housing Element by October 2021. The Housing Element is required to be internally consistent with the rest of the General Plan and in compliance with State statutes for housing programs and opportunities for development within the Town. The update will reassess the Town's housing related goals and objectives, while addressing issues and establishing objectives with respect to a wide range of possible housing related programs and projects. The Housing Element update will also have to show that the Town has available land zoned residential that will allow for opportunities of future development of a variety of housing for households of varying income levels. The number of units that must be planned for, in different income categories for future development, is referred to as the Regional Housing Needs Assessment (RHNA). This unit count is a number uniquely determined by HCD for each city and county in the State.

Once proposals have been received by the Town, members of Town staff will work to find the best proposals and qualifications and will conduct interviews. Staff will take into consideration all recommendations and choose the final proposal. The award of the

contract should be before the Town Council for approval in September 2020. Staff will work with the consultant to make sure there are plenty of outreach, allowing everyone who wants to participate in the process the opportunity to engage in the preparation of the document. Staff and the consultant of choice will work with HCD to obtain preliminary approval and eventually certification before the deadline of October 31, 2021.

**Fiscal Impact:**

The cost of the Housing Element and staff time will be funded through a grant obtained by the Town from the SB 2 Planning Grants Program funds awarded to the Town of Apple Valley by the State.

**Attachments:**

Request for Proposal

**TOWN OF APPLE VALLEY  
COMMUNITY DEVELOPMENT DEPARTMENT**

**REQUEST FOR PROPOSALS**

**FOR**

**THE PREPARATION OF  
2021-2029 HOUSING ELEMENT UPDATE**

**JUNE 23, 2020**



**RFP Issued: June 23, 2020**  
**RFP Submittal Deadline: August 13, 2020**

## **PROJECT OVERVIEW**

The Town of Apple Valley is seeking proposals from qualified consultants to prepare an update of the Town's 6<sup>th</sup> cycle Housing Element (2021-2029) and associated environmental review. Under the direction of the Assistant Town Manager, the consulting firm will review the existing Housing Element and revise this document to reflect current conditions, Town policies land uses and codes, and methods to meet the housing requirement mandated by the State of California. After review and evaluation of the submitted proposals, the Town will recommend the finalist to the Town Council for award of contract. The following defines the proposed project, scope of services, proposal requirements, selection process, and information to prepare and submit a proposal.

## **BACKGROUND**

The Town of Apple Valley, California, is located in the Victor Valley region of San Bernardino County in Southern California, and has a population of roughly 74,000. The Town's incorporated boundaries is approximately 78 square miles of land that is about a third developed. The Town has a Sphere of Influence encompassing approximately 200 square miles. Apple Valley is strategically located 95 miles northeast of the Los Angeles metropolitan area, 140 miles north of San Diego, and 185 miles south of Las Vegas. Once a playground of movie stars, Apple Valley continues to provide a wide range of reasons for families to make Apple Valley their home. The average household income is \$62,760. The population of the entire Victor Valley region is now more than 443,000.

The Town's Housing Element was last revised and adopted in 2013 and deemed in compliance with the State Housing Element law by the State Department of Housing and Community Development (HCD). The purpose of this project is to update the Housing Element to be internally consistent with the Town's General Plan and in compliance with state statutes so as to be certified by October 2021. The update will reassess the communities housing related goals and objectives, while addressing issues and establishing objectives with respect to a wide range of possible housing related programs and projects.

## **PROCUREMENT PROCESS**

The Town intends to enter into an agreement with a consultant to provide professional services as described in this RFP.

The Town will award a contract to the proposer with the apparent best value after the final agreement has been successfully negotiated. If no final agreement is reached between the Town and the proposer with the apparent best value proposal, the Town reserves the right to negotiate a contract with the proposer with the second highest score.

**I. REQUEST FOR PROPOSAL DOCUMENTS**

The Request for Proposal (RFP) documents, including the submittal requirements and the schedule, will be available in electronic format on the Town's website at [www.applevalley.org](http://www.applevalley.org). The Town reserves the right to reject any or all submittals or to waive any formality or technicality in any submittal in the interest of the organization.

**II. CONTACT INFORMATION**

Except as authorized by the Town representative or as otherwise stated in the RFP, communication during the selection process shall be directed to the specified Town representative. All communications regarding this project shall be directed to:

Lori Lamson,  
Assistant Town Manager  
14955 Dale Evans Parkway  
Apple Valley, CA 92307  
(760) 240-7000 x7208  
[llamson@applevalley.org](mailto:llamson@applevalley.org)

**III. QUESTIONS AND REQUESTS FOR CLARIFICATION**

Proposers may submit questions or formal requests for clarification on the RFP in writing until the submittal date via email at the contact address noted above.

**IV. SUBMITTAL DUE DATE AND TIMES**

Five (5) hard copies and one electronic copy in PDF format of all required submittals must be delivered to the Town, 14955 Dale Evans Parkway, Apple Valley, California 92307, no later than **4:00 P.M. Thursday, August 13, 2020**. Submittals received after the specified time will not be accepted. Please allow adequate time for delivery. PDF documents must have permissions enabled for comments and printing.

**V. PROPOSAL CONTENTS**

Each response to this RFP shall include the requirements contained in this RFP and consist of the following:

1. Listing of applicable past performances and references;
2. Management plan, project schedule, and statement of qualifications
3. Project proposal;
4. Contact information for the responsible party; and,
5. Cost of services.

**Past Performance and References**

The past performance of all proposers shall be considered in the selection process. Each proposer shall submit a listing of client references on three (3) similar projects completed within the past eight (8) years. Include contact information and one paragraph description for each key project. Additional relevant projects may be listed, with a briefer description of each.

**Management Plan**

Proposers must develop and submit a plan demonstrating how they will manage their responsibilities, identify risks, and how risks will be mitigated. If Town staff resources are to be utilized to assist in preparation of the Plan, the management plan should specify the anticipated amount of time and level of expertise that will be needed. The proposer shall address quality control, project specific criteria, risks that have been identified by the RFP and additional risks that the team has identified and state how those risks will be mitigated.

As part of the management plan, proposers shall include a proposed project schedule and indicate critical dates and other information in sufficient detail for the Town to determine if the time frames are reasonable. The management plan should be concise, yet contain sufficient information for evaluation by the Town.

**Preliminary Project Schedule**

The following is the anticipated schedule for the project. The schedule is preliminary and should be further refined and modified by the proposer in accordance with the Proposer's management plan.

- Issue RFP June 23, 2020
- Proposals due to the Town by 4:00 p.m. August 13, 2020
- Consultant selected and contract awarded Sept. 8, 2020
- Project Kickoff Sept. 14, 2020
- Administrative Draft Completed March 2021
- Public Review Draft Completed May 2021
- Preliminary submittal to HCD May 2021
- Draft CEQA review (MND) Completed June 2021
- Public Hearing Notice, Draft & MND released July 2021
- Final/Second submittal to HCD August 2021
- Planning Commission Public Hearing September 1, 2021
- Town Council Adoption October 12, 2021
- Submittal to HCD October 15, 2021

**Statement of Qualifications**

Each proposer shall include in the proposal a Statement of Qualifications (“SOQ”), a brief section that indicates the experience and qualifications of the firm, the project manager and other critical members of the team. It should describe what talents their team brings to the project, how their knowledge of the subject will provide benefit to the process, how the team has been successful in the past and how that relates to this project. The SOQ should include information on similar project that have been completed by the firm, project manager and other team members. The SOQ should also include the experience and special qualifications that are applicable to this project and/or are part of the project specific selection criteria.

**Project Proposal**

Each project proposal shall address the following scope of work requirements.

**Scope of Work**

In addition to the specific tasks listed below, Consultant will be required to:

- Frequently communicate with Town staff via telephone and email;
- Attend up to six (6) team meetings with Town staff, in person or via video conferencing media;
- Attend up to two (2) public workshops
- Attend up to two (2) meetings or video conferencing with Town Staff and California Department of Housing and Community Development (HCD) representative;
- Attend one Planning Commission meeting and up to two (2) Town Council meeting for the review and adoption of the project;

All work products by Consultant must be completed in accordance with California Housing Element laws and to the satisfaction of Town staff and HCD, which includes, but is not limited to, the tasks below:

**Task 1: Assessment**

Housing Element 2013-2021. Consultant will be required to review the Town’s current Housing Element and provide an evaluation of the following:

- Effectiveness of the housing policies and programs;
- Projected outcomes of the 2013 Housing Element compared to actual outcomes of the previous cycle;
- Significance of outcomes and their relationship with the Housing Element Update; and,
- Consistencies and deficiencies of the 2013 Housing Element compared to the current California Housing Element laws.

Town Documents. Consultant will be required to review Town documents and provide a summary of Town-wide conditions, resources, constraints, and funding options. Documents include, but are not limited to, the General Plan, applicable ordinances, Development Code, Sewer Policies, Housing Programs and Policies, and related environmental documents.

**Task 2: Analysis**

Site Inventory and Analysis. Town staff will assist in the land inventory identifying vacant and under-developed properties, properties with utility constraints and properties that could support a change in density allocations within the Town's allowed land uses. The consultant will be required to assist staff in analyzing the findings and producing the final inventory of land suitable for residential development.

Housing Needs. Consultant will be required to produce an analysis of existing and projected Town housing needs to satisfy the State Housing Element law, which includes, but are not limited to, the following components:

1. Housing stock characteristics, including but not limited to:
  - a. Overpayment and overcrowding
  - b. Vacant underutilized sites
2. Population, employment, and household characteristics and trends;
3. Housing cost and affordability
4. Housing needs of people in all income categories (especially extremely low-income housing needs) and specific groups;
  - a. Female-headed households
  - b. Large families
  - c. People experiencing homelessness
  - d. People with disabilities, including developmental disabilities
  - e. Seniors; and,
  - f. Veterans
5. Regional Housing Needs Allocation (RNHA) – Addressing project housing needs for the City's share in the published RHNA Plan.

Housing Constraints and Opportunities. Consultant will be required to identify and analyze potential and actual governmental and nongovernmental constraints to the maintenance, improvement, and development of housing for all income levels and people with disabilities. The analysis must also identify housing resources and feasible options and opportunities to mitigate or remove such constraints.

Community Outreach. The Consultant shall conduct two (2) public workshops to engage the opinions and needs of the residents and stakeholders in the community that may want to participate in the housing policies and opportunities in the Town's future. At least one of these



workshops should be conducted at the beginning of the project to determine base line issues and concerns within the community.

Housing Goals, Objectives, Policies and Programs. Consultant will be required to identify specific programs with clear actions, timeframes and measureable outcomes that will achieve quantified objectives/milestones and implement the Town's housing goals and policies.

**Task 3: Preparation**

Administrative Draft. Consultant will be required to prepare and submit two hard copies, one editable word document file, and one PDF file of the Housing Element Administrative Draft for Town staff review and comment. Consultant will be required to revise the Housing Element Administrative Draft to the satisfaction of Town staff.

Public Review Draft. Following final revisions to the Housing Element Administrative Draft, Consultant will be required to prepare and submit fifteen (15) hard copies, one editable word document file, and one PDF file of the Housing Element Public Review Draft for Town staff to disseminate to the Town Council, Planning Commission, HCD, general public, and any other interested parties for review and comment. Consultant will be required to revise the Housing Element Public Review Draft to the satisfaction of the Town staff and HCD.

Public Workshops, Planning Commission Public Hearings and Town Council Public Hearings. Consultant will be required to attend up to two (2) public workshops and three (3) public hearings to respond to questions and comments and be available to attend additional public workshops and hearing on a time and materials basis.

**Task 4: Environmental Review**

CEQA Completion and Submittal of All Required Documents. Consultant will be required to prepare and process an Initial Study and appropriate environmental document. Consultant will prepare all necessary documents and manage noticing and circulation of the Initial Study for the public and interested agency review and comment. The level of environmental review for the Housing Element Update is anticipated to largely depend on the Sites Inventory and Analysis, it is anticipated to require a Negative Declaration or a Mitigated Negative Declaration, but may require an Environmental Impact Report, including a list of assumptions for each option.

**Task 5: Adoption and Certification**

Housing Element. Consultant will be required to prepare and submit five (5) hardcopies, one editable word document file, one PDF file for the final version of the Housing Element to Town staff. Following Town Council adoption of the Housing Element, Consultant will also be required to coordinate and work with Town staff to obtain State of California Certification of the Housing Element.

**Budget**

Provide a proposed budget identifying each task, projected hours for completion of each task, and staff and hourly rates.

**Final Scope of Work**

The Final Scope of Work document shall be negotiated and executed prior to the start of the work. Should the Town and consultant be unable to come to a negotiated agreement, the contract may be negotiated and awarded to the second highest scoring proposal.

**VI. SELECTION CRITERIA FOR PROFESSIONAL SERVICES**

The following criteria will be used in ranking each of the proposers. The proposer that is ranked the highest will represent the best value for the Town. The Town will consider all criteria in performing a comprehensive evaluation of each proposal. Weights have been assigned to each criterion in the form of points with a total of 100 possible points.

- A. Past Performance Rating (5 points)
- B. Project Proposal (50 points)
- C. Strength of Team and Management (15 points)
- D. Schedule and Budget (25 points)
- E. Local Knowledge (5 points)

**VII. SELECTION**

The Town shall make the final consultant selection based on the above criteria.

**VIII. FORM OF AGREEMENT**

At the conclusion of the negotiations, the selected consultant will be required to enter into a Consultant Services Agreement.

**IX. LICENSURE**

The consultant shall comply with and require its sub-consultants to comply with the license laws of the State of California and shall obtain a business license with the Town.

**X. ASSIGNMENT**

Any contract resulting from this bid and any amendments or supplements thereto shall not be assignable by the successful bidder either voluntarily or by operation of law, without the written approval of the Town and shall not become an asset in any bankruptcy, receivership, or guardianship proceedings. Any assignee would need to have equivalent qualifications as to retain award eligibility.

**XI. CALIFORNIA PUBLIC RECORDS ACT**

It is the Consultant's responsibility to identify information in their qualifications and proposal that they consider confidential under the California Public Records Act. To the extent that the Town of Apple Valley agrees with that designation, such information will be held in strict confidence. All other information will be considered public.

**XII. MISCELLANEOUS**

This Request for Proposal does not commit the Town to award a contract or to pay any costs incurred in the preparation of a response to this request. This request is not a contract or commitment of any kind. All qualifications and proposals submitted in response to the request will become the property of the Town of Apple Valley and may be used by the Town in any way deemed appropriate. The Town reserves the right to accept or to reject, in part or in its entirety, the qualifications submittal if such action is deemed to be in the best interest of the Town.

A copy of the Town of Apple Valley General Plan is on file with the Community Development Department and available on the Town's website at [www.applevalley.org](http://www.applevalley.org) for consultant review.

**Attachments: Town Vicinity Map**

