



**REQUEST FOR QUALIFICATIONS (RFQ)  
AFFORDABLE HOUSING MONITORING AND COMPLIANCE  
PROGRAM DEVELOPMENT**

**Issue Date: January 12, 2010**

**Deadline: February 2, 2010**

The City of Santa Monica's Housing Division is seeking qualified experts to provide affordable housing monitoring and compliance program development. The selected firm will assist the City to update improve and perform its policies, procedures and monitoring activities for its CDBG, HOME, Affordable Housing Production Program (Inclusionary), Redevelopment Housing Trust Fund (RHTF) and other Housing Trust Fund (HTF)-financed very-low, low and moderate income units. The current City affordable housing portfolio monitoring obligations include the following:

AHPP	1,026 units
CDBG	445 units
HOME	434 units
RHTF	1,651 units
HTF	1,152 units

**Scope of Services:**

1. Review the Housing Division's current portfolio monitoring practices for CDBG, HOME, Affordable Housing Production Program (Inclusionary), Redevelopment Housing Trust Fund (RHTF) and other Housing Trust Fund (HTF)-financed very-low, low and moderate income units
2. Develop written policies and procedures for affordable housing monitoring activities, including electronic tracking and reporting forms (separately for HOME, CDBG and RHTF/HTF), utilizing existing materials where available
3. Develop written staff manual for affordable housing monitoring activities (separately for HOME, CDBG and RHTF/HTF) , utilizing existing materials where available and standardizing procedures across funding sources
4. Create a Master Calendar for the City's affordable housing monitoring and compliance program
5. Provide an estimate of total staff time, including management, to conduct and oversee monitoring
6. Conduct training sessions on the policies, procedures and manuals with Housing Division staff (may include actual monitoring visits)

**Statement of Qualifications Should Include:**

1. Cover letter signed by the firm's principal(s)
2. Describe your firm's experience
  - a. Monitoring CDBG, HOME, Redevelopment and other locally-financed very-low, low and moderate income housing programs (specifically state names of recent cities your firm has worked for and the scope of services you completed)
  - b. Monitoring Inclusionary housing programs
  - c. Developing policies and procedures (including staff manuals) for such programs

- d. Creating staff manuals, tools report templates and master calendars for monitoring and compliance (specify if any are software-based and if so the program utilized)
3. Provide information about the consulting team
  - a. Organizational Chart showing the individuals who will be involved in the project and their area of responsibility
  - b. Qualifications of the individuals who will be assigned to this project
4. Provide samples of your firm's work, written by those staff members who will be assigned to this project
  - a. Three to five sample sections from policies, procedures and/or manuals developed for other cities (Inclusionary and HUD samples required)
  - b. Three to five sample monitoring reports from monitoring visits (Inclusionary and HUD samples required)
  - c. One sample Master Calendar
5. Provide references
  - a. Three to five current references relative to local monitoring and compliance consulting
6. Provide a fee estimate that includes
  - a. Hourly rates for consulting services; or
  - b. Rates for specific products; and
  - c. Approximate number of hours necessary and projected timeline to conduct activities described in the Scope of Work

### **Schedule**

RFQ responses are due to the Housing Division by 5:00 p.m. on February 2, 2010. Responses will be evaluated for qualifications, pricing and timeline. It is anticipated that work will begin during February or March 2010 and that the project will be complete by June 2010. Please submit five hard copies and one CD of your Statement of Qualifications to:

MONITORING CONSULTING RFQ  
City of Santa Monica Housing Division  
1901 Main Street, Suite B  
Santa Monica, CA 90405

Please direct questions in connection with this RFQ to:

Lisa Luboff, Senior Administrative Analyst  
Housing Division, City of Santa Monica  
Phone: (310) 434-2651 Email: [lisa.luboff@smgov.net](mailto:lisa.luboff@smgov.net)

### **Waiver of Legal Remedies**

Please be aware that by submitting a response to this Request for Qualifications, prospective consultant waives all rights to protect or seek any legal remedies whatsoever regarding any aspect of this Request for Qualifications. The City reserves the right to select any number of qualified consultants. In addition, the City reserves the right to issue written notice to all participating firms of any changes in the Qualifications submission schedule, should the City determine in its sole and absolute discretion that such changes are necessary. Acceptance of any Statement of Qualifications submitted pursuant to this Request for Qualifications shall not constitute any implied intent to enter into a contract for consulting services. The City reserves the right to reject any and all Statements of Qualification.