

# REQUEST FOR PROPOSALS

## SCOPE

Idaho Housing and Finance Association (IHFA) seeks a qualified professional consultant to conduct a variety of activities regarding Idaho's affordable housing demographics, needs, and regional markets to help inform and prepare sections of the next Five-Year Consolidated Plan for Idaho's HUD-CPD Programs. Consultant will also present this information to Idaho's citizens and stakeholders and draft the Housing Needs Assessment and Housing Market Analysis sections of the 2025-2029 Five-Year Consolidated Plan (for HUD-CPD programs).

Respondents will follow the Consolidated Plan (ConPlan) requirements in at [24 CFR Part 91](#) the Consolidated Plan IDIS Desk Guide found at <https://www.hudexchange.info/resource/2641/econ-planning-suite-desk-guide-idis-conplan-action-plan-caper-per/> regarding the Consultation (PR-10), Citizen Participation (PR-15), and Needs Assessment (NA) and Housing Market Analysis (MA) sections of the Consolidated Plan. Further, the successful respondent needs to ensure requirements under HUD CPD Notice 20-04 (Broadband and Resiliency).

Consultant will need to propose how and the estimated timeline for information-gathering, data collection, stakeholder consultation and public meetings, pre-draft review, drafting & review, and post-draft follow-up. IHFA anticipates submission to HUD on or around March 1, 2025.

The HUD-CPD programs included in this RFP are the State's HOME Investment Partnership Program, The National Housing Trust Fund Program, and The Emergency Solutions Grant Program. Idaho's Community Development Block Grant Program (CDBG) and its related Consolidated Planning requirements are **not** included in the scope of this RFP. *CDBG will use outreach, data sets, etc. to develop their portion of the ConPlan and First Year Action Plan.*

The objective of this RFP is to locate who can assist with the successful outreach, data analysis, draft, and successfully submit the ConPlan and First Year Action Plan. While price is always a significant factor, other criteria will form the basis of the decision. A full description is available in the **Proposal EVALUATION CRITERIA**.

IHFA reserves the right to amend, suspend, terminate, or reissue this RFP, in whole or in part, at any stage. In no event is IHFA liable to respondents for any cost or damages incurred in connection with the RFP process, including but not limited to, any and all costs of preparing a response to this RFP, or any other costs incurred in reliance on this RFP. No respondent shall be entitled to repayment from IHFA for any costs, expenses, or fees related to this RFP. All supporting documentation submitted in response to this RFP will become the property of the IHFA. Respondents may also withdraw their interest in the RFP, in writing, at any point in time, as more information becomes known.

SCOPE.....	1
GENERAL BACKGROUND INFORMATION .....	2
IMPORTANT DATES WITH LINKS TO THE SPECIFIC SECTIONS .....	2
TIMELINE .....	2
THE APPROACH .....	3
PRE-DRAFT PHASE: .....	3
DRAFTING TIMELINE PHASE: .....	3
POST DRAFT: .....	4
IHFA RESPONSIBILITIES.....	4
PROPOSAL FORMAT .....	4
PROPOSAL EVALUATION CRITERIA .....	4
PROPOSAL SELECTION PROCESS .....	5
PROPOSAL SUBMISSION REQUIREMENTS .....	5
PROPOSAL SUBMISSION DEADLINE .....	5

**GENERAL INFORMATION & REQUIREMENTS .....5**  
**QUESTIONS/INQUIRIES .....5**

**GENERAL BACKGROUND INFORMATION**

Idaho's Program Year for HUD-CPD Programs is April 1 through March 31. The next (2025-2029) Five-Year Consolidated Plan must be ready to submit to HUD in IDIS<sup>1</sup> by March 1, 2025.

IHFA is the State Grantee for the following HUD-CPD affordable housing programs: The HOME Investment Partnerships Program, the National Housing Trust Program, and the Emergency Solutions Grant. IHFA also administers Idaho's Low-Income Housing Tax Credit Program, the Section 8 Housing Choice Voucher Program, and Idaho's CoC- Balance of State.

The Idaho Department of Commerce (IDC) is the State Grantee for Idaho's CDBG Program-Non-Entitlement Areas. In general, Idaho's CDBG program provides funding to incorporated cities with populations fewer than 50,000 and counties for Public Facilities Construction and Improvement activities, Economic Development Projects, and Senior Citizen and Community Centers.

Idaho's CDBG program and Consolidated Plan requirements are not a component of this RFP. Data from the selected contractor will assist CDBP in completing their portion of the ConPlan and First Year Action Plan.

Consultant will follow the most current requirements when conducting the activities and drafting

- HUD eCon Planning Suite, [Consolidated Plan in IDIS Desk Guide - HUD Exchange](#)
- Citizen Participation And Consultation Toolkit <https://www.hudexchange.info/consolidated-plan/econ-planning-suite-citizen-participation-and-consultation-toolkit/>
- Idaho's Public Participation Plan for HUD-CPD Programs <https://www.idahohousing.com/documents/2021-citizen-participation-plan.pdf>

**IMPORTANT DATES**

June 1, 2024- Proposal Submission Deadline

June 24, 2024- IHFA selects consultant

December 1, 2024- Deadline for all activity results and ConPlan sections to be in final draft form

January 15 – 30-day public comment period begins

March 1, 2025- IHFA submits 2025-2029 Five-Year Consolidated Plan to HUD for review\*

**TIMELINE**

- Pre-Drafting and Drafting activities must take into account the following required timelines: One Pre-Draft public meeting advertised by 30-day published notice, one Post-Draft public hearing, and one Post-draft 30-day public comment period (will occur within the same 30-day timeframe and published in the same notice).
- Submission date of the ConPlan to HUD is on or before **March 1, 2025\***.
- Consultant will conduct (4) regional stakeholder sessions and attend one pre-draft and one post-draft) public hearings
- Consultant will be responsible for setting up, maintaining, and tracking the results of the online statewide housing needs survey. Consultant will then compile and summarize the results of the survey in a report to be posted

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<sup>1</sup> HUD-CPD Integrated Disbursement and Information System

\*Possible delay due to HUD release of final allocation details

online and available to the public.

- IHFA and IDC will coordinate with Consultant to schedule the dates of the two (2) required public hearings, two (2) 30-day public comment periods.
- IHFA will publish all required legal notices and distribute information regarding surveys, legal notices, etc., to the public and stakeholders.

## **THE APPROACH**

There are three general phases to the overall project.

### **Pre-Draft Phase:**

Information-gathering and consultation activities\*

Subject to IHFA approval, consultant will conduct Citizen Participation and Stakeholder Consultation activities currently identified in the *Citizen Participation and Consultation Toolkit* located at <https://www.hudexchange.info/consolidated-plan/econ-planning-suite-citizen-participation-and-consultation-toolkit>.

**\*Outreach activities will include at minimum the following four (4) specific activities:**

1. ***A Statewide Affordable Housing Needs Survey***  
*This online survey will be anonymous and controlled by the consultant. Questions will address regulatory requirements of the HOME, HTF, and ESG programs (housing type, households served, local housing needs, priority populations, etc.) as each relates to housing in the state, and other information as approved by consultant and IHFA. Consultant will collect, compile, analyze, and draft the results of the survey into a report format.*
2. ***Update Idaho's 2019 County-level Housing & Demographic Data***  
<https://www.idahohousing.com/documents/2019-idaho-county-level-housing-demographic-data.pdf>
3. ***Facilitate Four (4) Regional Topic-Oriented Stakeholder Sessions***  
*Regional stakeholder discussions facilitated by Consultant on the dates/times/locations will be TBD and approved by IHFA. Timing will be after the results of the Anonymous Affordable Housing Needs Survey are compiled but prior to the Pre-Draft Public Meeting). The four regions for the stakeholder discussions are northern, eastern, southern, and western Idaho. IHFA will work with Consultant on discussion items, location of each session, and email distribution.*
4. ***One Pre-Draft Public Meeting***  
*Present findings from the above activities to the public and receive comments. This meeting will be hybrid, physically held in Boise Idaho at a time and place TBD and made available virtually. Format and presentation style TBD.*

### **Drafting Timeline Phase:**

Consultant will submit, an approved and final draft of all activities, at least 6 months prior to the Post-Draft 30-day Comment Period (to allow IHFA time to complete the remaining section of the ConPlan, including the 2025 Annual Action Plan). The Post-Draft 30-day comment period is tentatively scheduled January 1- January 31, 2025.

- **By December 1, 2024**, consultant will provide IHFA, in finalized draft form of all completed "Pre-draft Phase" activities and a draft of the following ConPlan Sections:
  - 1) Consultation (PR-05 through PR-15)
  - 2) Needs Assessment (NA-10 through NA-50)
  - 3) Market Analysis (MA-05 through MA-50)
  - 4) IHFA ConPlan and First Year Action Plan (SP-10 through SP-80 & AP-15 through AP-91)

The draft will be submitted as a Word Document via Procorem (portal system). Each individual section must satisfy the requirements outlined in HUD's Consolidated Plan Desk Guide

<https://www.hudexchange.info/programs/consolidated-plan/guides/#consolidated-plan-template-in-idis>

**Post Draft:**

- Consultant will be available to provide additional information/responses as needed for the Consolidated Plan until approved by HUD.

**IHFA RESPONSIBILITIES**

- Provide stakeholder contact information
- Publish legal notices in Idaho's major newspapers, major libraries, and IHFA branch office
- Post online surveys, plans, notices etc. on IHFA and IDC websites
- Once approved, pay detailed invoices within 30 days
- Review drafts submitted by Consultant within 15-20 days
- Submit the 2025-2029 Consolidated Plan to HUD by March 1, 2025\*

**PROPOSAL FORMAT**

1. Introductory letter that includes the primary contact for the project
2. Statements of qualification and experience for the entity and all individuals involved in the project:
  - (a) Description of similar projects that were successfully completed
  - (b) Name and contact information of previous clients
  - (c) Name and resume of the project manager
  - (d) Names and experience of others not listed, but may work on the project
3. Detailed description of the entire project including individual tasks/activities
4. Schedule and detailed timeline
5. Budget with cost breakdown by individual task/activity

**PROPOSAL EVALUATION CRITERIA**

In no particular order of importance

- (1) Experience;
  - Describe successful projects of similar size, scope, and timeline (previous state-level ConPlan experience is preferred but not required)
  - Describe working knowledge of the Consolidated Plan, including the regulations and requirements;
  - Describe working knowledge of the HOME, HTF, & ESG programs
  - Describe prior facilitation and consensus building activities with a focus on affordable housing
  - Describe ability to complete the project based on current workload and other projects
  - Describe ability to design, implement, manage, and report an online survey and anonymous responses
  - Describe the project team and their previous relevant experience
  - References with primary contact information
  - Describe ability to present technical data in a user-friendly format compatible with the IDIS online system
- (2) Full description of pre-draft activities, how each activity will be carried out, technology used, personnel, and how the results will be reported and documented, how it can be used to inform and meet the Consolidated Plan requirements;

- (3) Schedule of proposed activities with timeline and proposed completion date(s);
- (4) Project completion timeline for individual activities, written responses, reports, etc.;
- (5) Complete cost breakdown by individual activity and overall project;

### **PROPOSAL SELECTION PROCESS**

- (1) IHFA will review each proposal that meets the evaluation criteria. Phone interview may be conducted for additional clarification
- (2) Proposal will be selected **by June 24, 2024**
- (3) Scope of work, drafting and submission timeline, and price will be negotiated with the successful contractor.
- (4) If IHFA and the contractor are unable to reach an agreement, IHFA retains the right to move on and negotiate with other contractors.

### **PROPOSAL SUBMISSION REQUIREMENTS**

**Proposals will only be accepted electronically.** Contact Laura Lind at [LauraL@IHFA.org](mailto:LauraL@IHFA.org) for questions, or to request access to the portal system for electronic proposal submission.

### **PROPOSAL SUBMISSION DEADLINE**

- 11:59 p.m. (MST), **June 1, 2024**
- Late or incomplete submittals will be rejected

### **GENERAL INFORMATION & REQUIREMENTS**

- All work will be performed on a fixed-rate, cost-incurred basis. IHFA will retain 10 percent (10%) of the contract amount until approval by HUD.
- If IHFA determines progress, as measured by the agreed upon timeline and activity description, is inadequate, it reserves the right to terminate the contract with a 30-day written notice.
- IHFA strongly desires continuity of lead staff. Therefore, when key staff are replaced, if IHFA deems the replacement unacceptable, consultant will have 30 days from date IHFA issues such notice in writing, to provide acceptable replacement staff by written notice. Failure to do so may be defined as a breach of contract and subject to cancellation.
- Although cost is a factor, IHFA reserves the right to select the consultant that best suits its needs.
- IHFA reserves the right to reject any or all proposals, and/or waive any irregularities therein.
- Evidence of General and Professional Liability Insurance required prior to execution of contract.
- Any changes in project cost, timeline, or scope during the contract must be pre-approved in writing by both the parties.

### **QUESTIONS/INQUIRIES**

Laura Lind - [LauraL@IHFA.org](mailto:LauraL@IHFA.org)