

**ANALYSIS OF IMPEDIMENTS TO  
FAIR HOUSING CHOICE**

**REQUEST  
FOR  
PROPOSALS**

for

**County of San Mateo  
City of Daly City  
City of Redwood City  
City of San Mateo  
City of South San Francisco**

with special focus on

**East Palo Alto  
Half Moon Bay  
Menlo Park  
North Fair Oaks  
San Bruno**

**REQUESTS FOR PROPOSALS (RFP)  
FOR PREPARATION OF  
ANALYSIS OF IMPEDIMENTS TO FAIR HOUSING CHOICE**

In accordance with the 24 CFR Part 85 .36, which establishes standards for the procurement of property and services involving the expenditure of federal funds, the County of San Mateo and Cities of Daly City, Redwood City, San Mateo, and South San Francisco (Jurisdictions) hereby requests proposals from qualified individuals and firms for the provision of professional consulting services in the preparation of an Analysis of Impediments to Fair Housing Choice (AI) for San Mateo County.

**BACKGROUND**

The Jurisdictions are entitlement jurisdictions under the Department of Housing and Urban Development's (HUD's) Community Development Block Grant (CDBG) Program and HOME Investment Partnerships Program (HOME). As a condition of these federal grants, the Jurisdictions are required to certify to HUD that they will affirmatively further fair housing. These certifications are included in their Annual Action Plans submitted to HUD.

**TYPES OF SERVICES REQUIRED**

The AI shall be prepared in accordance with HUD's Fair Housing Planning Guide, Volume I, which can be found at <http://www.hud.gov/offices/fheo/images/fhpg.pdf>. The desired elements of the AI are as follows:

**BACKGROUND DATA**

1. An examination of pertinent data including demographic, income, employment and housing data as well as studies that have been completed that relate to fair housing.
2. A review of prior and current activities that promote fair housing, including an assessment of agencies currently providing fair housing programs in the area.
3. An examination of private market issues that relate to the sale or rental of housing, the provision of brokerage services, mortgage lending, insurance sales and underwriting, property appraisal and property management.
4. An evaluation of public policies and practices which affect the provision of fair housing including but not limited to public services, state and local laws, ordinances and regulations, planning and zoning laws and decisions, land use regulations, community development funding policies and practices in areas of low and high opportunity, procedures and practices of the local public housing authority and property tax policies including, but not limited to tax exemptions.
5. Identification of impediments to fair housing for each Jurisdiction listed in order of priority with proposed methods of corrective actions to address identified impediments.
6. The following are expected to be completed as a part of the Scope of Services:
  - Identify the public meetings needed in the gathering of information and the potential groups needed to participate. The Consultant will be responsible for preparing agendas, handouts, and other presentation materials as appropriate as well as maintain notes and results of each public meeting. The Jurisdictions can assist with the public meetings, including providing or arranging for meeting space.

- Provide drafts of the AI report in progress for review and comment by the Jurisdictions prior to submission of final document.
- Provide six (6) hard copies of the final AI report, one original for each Jurisdiction and a copy for the HUD San Francisco office, in addition to an electronic version and PDF version accessible to all Jurisdictions.

## **EVALUATION OF JURISDICTIONS CURRENT FAIR HOUSING LEGAL STATUS**

1. Findings resulting from fair housing complaints and lawsuits;
2. Reasons for trends or patterns; and
3. Discussion of other fair housing concerns or problems.

## **IDENTIFICATION OF IMPEDIMENTS TO FAIR HOUSING CHOICE**

1. Public Sector
  - a. Public policies and actions affecting approval of sites and other building requirements used in the approval process for the construction of housing
    - i. Local zoning laws and policies, exclusionary zoning;
    - ii. Land use policies, impact fees; and
    - iii. Planning and zoning boards -structure and decision-making trends.
  - b. Administrative policies that may affect the location of affordable housing opportunities outside of areas of minority concentration.
    - i. Displacement;
    - ii. Neighborhood revitalization;
    - iii. Municipal services;
    - iv. Sale/demolition of subsidized housing;
    - v. Property tax policies;
    - vi. Construction of affordable housing programs; and
    - vii. Housing rehabilitation loan/grant programs.
  - c. Barriers to full access of housing services.
  - d. Public Housing and other assisted/insured housing provider tenant selection procedures; housing choices for certificate and voucher holders.
2. Private Sector
  - a. Sale or rental of housing.
    - i. Real estate practices, such as steering or blockbusting -broken out by race and ethnic group;
    - ii. Deed restrictions, trust, or lease provisions;
    - iii. Conversion of apartments complexes to condominiums;
    - iv. Sale/conversion of mobile home parks;
    - v. Property management firms "occupancy quotas"; and
    - vi. Exclusionary advertisements and questionable application forms/procedures.
  - b. Provision of housing brokerage services.
    - i. Exclusion of minority brokers from participation in multiple listing service or professional associations;
    - ii. Assignment of brokers by areas of racial/ethnic composition of Census tracts; and
    - iii. Restrictions in use of privileges, services, or facilities by all brokers.
  - c. Provision of financing assistance for housing, including second mortgage / refinancing lending

- i. Discriminatory lending patterns, practices, and disclosures;
  - ii. Discriminatory appraisal and underwriting practices;
  - iii. Disinvestments and redlining practices;
  - iv. Racial credit steering;
  - v. Predatory lending; and
  - vi. Discrimination in property insurance risk assessment and underwriting.
- 3. Other Areas of Inquiry
  - a. Discriminatory actions based on language/cultural barriers or physical/mental disability and special needs of these populations;
  - b. Compliance with accessibility requirements in construction of multi-family units;
  - c. Effects of perceived geographic divisions/images; and
  - d. Employment-Housing-Transportation linkage; effectiveness of mobility programs to encourage desegregation.

**IDENTIFICATION AND ASSESSMENT OF ALL PUBLIC AND PRIVATE FAIR HOUSING ACTIVITIES**

- 1. Fair Housing Enforcement
  - a. Identification of entities involved in fair housing enforcement; and
  - b. Roles/responsibilities/limitations and quantifiable accomplishments compared to prior studies.
- 2. Fair Housing Education
  - a. Identification of entities involved in local fair housing education or fair housing advocacy; and
  - b. Description of each entity's activities and quantifiable accomplishments compared to prior studies.

**CONCLUSIONS AND RECOMMENDATIONS**

Each of these elements is to be summarized, with findings and recommendations provided in a clear manner delineating the specific finds and recommendations for each Jurisdiction. In addition, there shall be a separate appendix that provides one summary document of all findings and recommendations listed per each Jurisdiction.

**STRATEGY TO ADDRESS IMPEDIMENTS TO FAIR HOUSING CHOICE**

Compare conclusions and recommendations of the current AI with prior jurisdictional studies and already implemented strategies to address fair housing. Based on these comparisons develop short term and long term strategies for each jurisdiction independent of each other.

**GEOGRAPHIC REGIONS FOR IDENTIFYING IMPEDIMENTS**

Impediments will be identified for San Mateo County in its entirety and with City and/or Census tract level detail when applicable.

## **INFORMATION REQUIRED IN PROPOSAL**

Each response to this RFP shall contain the following:

1. Name of individual or firm, business address and telephone number, along with a brief history of the stability and continuity of the proposer's service.
2. Names and qualifications of key individuals who will be assigned to the project. Identify any sub-consultants that will be used in the project.
3. Description of the experience in conducting AIs as well as the capacity to conduct this AI.
4. Description of the proposed approach to providing the required services including specific methodologies for completing various aspects of the AI study.
5. Proposed project timeline and schedule of key dates.
6. Fixed price fee proposal.
7. Names and contact information for three client references familiar with your AI accomplishments or other similar projects (Consolidated Plan, Housing Element, etc.)
8. Small business, minority, women's, or disadvantaged business enterprises are encouraged to apply. Please indicate if your organization is one of these types of businesses.

## **SELECTION**

The Jurisdictions will select the proposal that demonstrates the highest degree of experience and competence. Each proposal will be rated and ranked based on the following criteria:

1. Continuity and stability of proposer;
2. Demonstrated ability and capacity;
3. Quality of proposal:
  - a. Approach for conducting AI study;
  - b. Specific methodologies for completing various aspects of the AI study
4. Total price of study, with specific line items called out; and
5. Ability to meet proposed timeline.

Selected contractor will be required to provide proof of insurance coverage including Commercial General Liability and Automobile Liability with limits of not less than \$1,000,000 each occurrence with participating jurisdictions named as additionally insured, as well as Workers' Compensation in at least the minimum statutory limits. Further insurance details will be included in contract.

## **COMPLETION OF AI STUDY**

The selected contractor must be able to research and submit a completed AI study to the satisfaction of the Jurisdictions within five (5) months of date contract awarded.

## DEADLINE FOR PROPOSALS

Interested parties should submit a print-ready PDF version of their proposals **no later than 4:00 p.m. on February 3, 2012**. Proposals should be submitted to:

Heather Stewart  
Neighborhood Improvement & Housing Specialist  
City of San Mateo  
330 West 20<sup>th</sup> Avenue  
San Mateo, CA 94403  
[hstewart@cityofsanmateo.org](mailto:hstewart@cityofsanmateo.org)  
650.522.7228

## ESTIMATED PROJECT TIMELINE

DATE	BENCHMARK
January 5, 2012	Request for Proposal Available
January 12, 2012	Bidder's Conference <ul style="list-style-type: none"><li>• RSVP Requested to Heather Stewart</li></ul> City of San Mateo Conference Room C 330 West 20 <sup>th</sup> Avenue San Mateo, CA 94403
February 3, 2012	Proposals due
February 13-17, 2012	Consultant Interviews
February 24, 2012	Consultant Selection
March 16, 2012	Execute Consultant Agreement
July 20, 2012	First draft of AI submitted
August 10, 2012	Review and comment of draft AI to Consultant
September 1, 2012	Final bound edition with appropriate number of copies and PDF version submitted

## QUESTIONS

RSVP for Bidder's Conference and questions regarding the Request for Proposals can be directed to:

Heather Stewart  
Neighborhood Improvement & Housing Specialist  
City of San Mateo  
[hstewart@cityofsanmateo.org](mailto:hstewart@cityofsanmateo.org)  
650.522.7228