

REQUEST FOR PROPOSALS  
NORTHERN CALIFORNIA LAND TRUST

Original issue March 30<sup>th</sup>, 2019.

DUE DATE: August 5<sup>th</sup>, 2019

DESCRIPTION OF NEED:

The Northern California Community Land Trust seeks expressions of interest from a consultant to provide consulting education services to residents of 2 scattered site CLT projects in order to assist residents in fully evaluate the potential for conversion to a CLT Limited equity housing cooperative from the current status of a professionally managed and resident involved affordable rental.

The scope of work consists of a series of (2) to (3) in-person trainings for the residents of each of a 5 unit property and separately a 6 unit property that include:

- Benefits of a (5) or (6) unit cooperative ownership vs current non-profit ownership
- Risks of the same
- Evaluation of work to be done including refinance of properties, estimate of conversion costs, assessment of financial risk / rewards including the potential for loss or interruption of Section 8 subsidies, property tax, fair housing, financing and compliance implications.
- Education as to the formation process and ongoing management responsibilities for residents.
- Education around alternatives such as maintaining current status or engaging in self-management agreement.

To SUBMIT:

For consideration please forward a copy of your proposal to [jobs@nclt.org](mailto:jobs@nclt.org) no later than 11:59 PM PDT on August 5<sup>th</sup>, 2019<sup>1</sup>

Submit questions on the RFP to [francis.mcilveen@nclt.org](mailto:francis.mcilveen@nclt.org).

A full proposal must include:

- statement of qualifications and relevant experience including citations of any relevant published or peer-reviewed materials
- a proposed scope of work and curriculum including proposals to incentivize resident attendance
- proposed location
- Proposed cost and billing structure
- Description of intended compliance with contracting requirements.

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<sup>1</sup> Revised from original issue of date April 15<sup>th</sup>, 2019

#### JUDGING:

- Expertise in the following categories<sup>2</sup>
  - Quality of expertise in Co-op formation and education of diverse residents at a variety of income levels
  - Demonstrated ability to work with diverse groups
  - Quality of CLT expertise
  - Quality of expertise in affordable housing compliance and financing
- Cost-Effectiveness for proposals meeting requirements

#### CONTRACTING REQUIREMENTS:

- The project is subject to a number of specific contracting requirements imposed by the City:
  - Independence and conflict of interest: the Consultant must be considered an independent person (either natural person or entity) that has no current employment, board or residential relationship with financially affiliated partners of the project or NCLT's current education and training team<sup>3</sup>
  - Follow any required City imposed sub-contract requirements including ability to provide insurance as required. See attached file - CFR-2012-title2-vol1-part215\_procurement procedures required by city and refer to the Development Loan Agreement (available on request) for additional subcontract requirements.

#### NOT A COMMITMENT TO CONTRACT

The NCLT retains sole discretion to cancel, withdraw, amend or republish this RFP should no feasible or affordable proposals be received.

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<sup>2</sup> Judgement metrics and point scores : Demonstrated quality of expertise – 10 points. Judged on the basis of local, regional, statewide, or nationally leading expertise and track record ; Demonstrated ability to work with diverse resident groups (in terms of race, age, economic diversity, and household status) – 10 points; Ability to provide independent advice to resident group and NCLT without conflicts of interest, potential conflicts of interest, or an appearance of conflicts of interest with any potential funding sources. 20 points ; Proposal budgets fit with available budget for RFP and / or leverage other available educational funding 10 points

<sup>3</sup> The following is brief but not exhaustive list of organizations and current staff, current residents, or board participating in NCLT's regional training and education program and thus ineligible to submit proposals: City of Berkeley, ACCE, CA CLT Network, Bay Area CLT Consortium members including (BACCLT, OakCLT, Sonoma CLT, PAHALI, CLAM, Sacramento), BARHII, CCCD, EBCLC, EBPREC, GSN, Metropolitan Transportation Commission, People's Land and Housing Alliance members, SEEDS, SELC, People of Color Sustainable Housing Network, The SF Foundation, CCHD, Urban Habitat, Urban Strategies.