



# COUNTY OF ALAMEDA

REQUEST FOR PROPOSALS No. PLN2025-001

for

## TRANSIT-ORIENTED COMMUNITIES HOUSING POLICY INITIATIVE

For complete information regarding this project, see Request for Proposal (RFP) posted at [Alameda County Current Contracting Opportunities](https://gsa.acgov.org/do-business-with-us/contracting-opportunities/) [https://gsa.acgov.org/do-business-with-us/contracting-opportunities/] or contact the County representative listed below.

Thank you for your interest!

Contact Person: Angelica González, Senior Planner

Phone Number: (510) 670-6524

Email Address: [Angelica.Gonzalez@acgov.org](mailto:Angelica.Gonzalez@acgov.org)

Community Development Agency – Procurement

**RESPONSE DUE**

by

**2:00 p.m.**

on

**Monday, June 2, 2025**

via email as PDF to

[Angelica.Gonzalez@acgov.org](mailto:Angelica.Gonzalez@acgov.org)

Alameda County, Community Development Agency, Planning Department



Alameda County is committed to reducing environmental impacts across our entire supply chain. If printing this document, please print only what you need, print double-sided, and use recycled-content paper.

**CALENDAR OF EVENTS**  
**REQUEST FOR PROPOSAL No. PLN2025-001**  
**Transit-Oriented Communities Housing Policy Initiative**

| EVENT  | DATE/LOCATION   |
|--|---|
| Request Issued   | May 2, 2025   |
| Networking/Bidders Conference<br>(virtual only)  | <p>May 12, 2025 at 2pm</p> <p>Please click the link to join the Zoom meeting:<br/> <a href="https://us02web.zoom.us/j/83063559335?tk=MRSsBwxC3anvaVWPHh30ZT2ZWDwcJeKkF73TCBwspy0.DQcAAAATVvlUpXy2REFWbGJIU1lxT1RmaENVOF8wYzFBAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA">https://us02web.zoom.us/j/83063559335?tk=MRSsBwxC3anvaVWPHh30ZT2ZWDwcJeKkF73TCBwspy0.DQcAAAATVvlUpXy2REFWbGJIU1lxT1RmaENVOF8wYzFBAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA</a></p> <p>US: <a href="tel:+16699009128">+16699009128</a>,<a href="tel:+16699009128">,83063559335#</a> or <a href="tel:+16694449171">+16694449171</a>,<a href="tel:+16694449171">,83063559335#</a></p> <p>Or, dial: US: +1 669 900 9128 or +1 669 444 9171 or +1 253 215 8782 or +1 346 248 7799 or +1 719 359 4580 or +1 253 205 0468 or +1 309 205 3325 or +1 312 626 6799 or +1 360 209 5623 or +1 386 347 5053 or +1 507 473 4847 or +1 564 217 2000 or +1 646 558 8656 or +1 646 931 3860 or +1 689 278 1000 or +1 301 715 8592 or +1 305 224 1968 . <a href="#">More International numbers</a></p> <p>Webinar ID: 830 6355 9335</p> |
| Written Questions Due via Email:<br><a href="mailto:angelica.gonzalez@acgov.org">angelica.gonzalez@acgov.org</a> | May 13, 2025, by 5:00 p.m.  |
| List of Attendees  | May 14, 2025  |
| Questions & Answers Issued   | May 21, 2025  |
| Addendum Issued<br>(only if necessary to amend RFP)  | May 21, 2025  |
| Response Due and Submitted to:<br><a href="mailto:angelica.gonzalez@acgov.org">angelica.gonzalez@acgov.org</a>   | June 2, 2025, by 2:00 p.m.  |
| Evaluation Period  | June 2, 2025 – June 12, 2025  |

|   |                             |
|---|-----------------------------|
| <b>Optional Vendor Interviews</b>       | <b>Week of June 9, 2025</b> |
| <b>Notice of Intent to Award Issued</b> | <b>June 13, 2025</b>        |
| <b>Board Consideration Award Date</b>   | <b>July 22, 2025</b>        |
| <b>Contract Start Date</b>              | <b>September 1, 2025</b>    |

***NOTE: All dates are tentative and subject to change.***

# COUNTY OF ALAMEDA

## REQUEST FOR PROPOSAL No. PLN2025-001 SPECIFICATIONS, TERMS & CONDITIONS

for

### TRANSIT-ORIENTED COMMUNITIES HOUSING POLICY INITIATIVE

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#### ATTACHMENTS

EXHIBIT A

BID **RESPONSE PACKET** BID RESPONSE PACKET

EXHIBIT B - BACKGROUND INFORMATION: EXCERPTS FROM MTC ADMINISTRATIVE GUIDANCE:  
TRANSIT-ORIENTED COMMUNITIES POLICY (NOVEMBER 2024)

EXHIBIT C - COUNTY OF ALAMEDA MINIMUM INSURANCE REQUIREMENTS

I. **STATEMENT OF WORK**

A. **INTENT**

It is the intent of these specifications, terms, and conditions to describe the ideal package of contractor services to develop Transit-Oriented Communities-compliant Inclusionary Zoning and Ministerial Review ordinances and complete related studies being requested by the County.

The County intends to award a 22-month contract to the Bidder selected as the most responsible Bidder whose response conforms to the RFP and meets the County’s requirements. The total amount of the contract awarded for the 22-month term for providing the scope of services described in this RFP. The county has allocated a total budget of \$200,000 for contractor services; the grant funding this RFP will also pay for \$80,000 of staff time. The source of funding for services provided under this RFP is regional (Metropolitan Transportation Commission Transit-Oriented Communities Planning and Implementation Grants). The contract is expected to begin in September 2025 and conclude by July 2027.

B. **SCOPE**

The Alameda County Community Development Agency is seeking a consultant with experience, capacity and skills necessary for the county to achieve compliance with MTC’s Transit-Oriented Communities (TOC) policy by researching, developing, and bringing to the Board of Supervisors an Inclusionary Zoning Ordinance, and an Ordinance to expand on the County’s existing Ministerial Approval process. All proposed Ordinances must comply with the TOC Policy and include the following tasks and deliverables necessary for implementation. Modifications that enhance the scope or improve efficiency are welcome, where feasible. Optional tasks have been identified which may be completed by staff due to budget limitations.

**Task 1: Project Management, Meetings & Coordination**

A consultant Project Manager (PM) will be responsible for coordinating team meetings, meeting minutes, managing review cycles and managing the project schedule. Team meetings will include County staff and may include agency partners to provide project updates. The PM will also be responsible for obtaining input from applicable County departments and regional partners on draft materials prior to finalizing and soliciting and obtaining feedback on the draft report prior to its completion.

A Planner from the County will be designated as the County project manager responsible for providing day-to-day direction and assistance to the selected consultant.

**Task 1 Deliverables:**

- 1.1 Draft and Final Project Schedule (update as needed)
- 1.2 (Optional) Monthly progress reports
- 1.3 Bi-weekly Team meetings (as needed and PM to lead and provide meeting minutes)
- 1.4 Quarterly invoicing

- 1.5 Maintenance of project budget
- 1.6 Maintenance of Project Materials Folder
- 1.7 Facilitate collaboration and coordinate with County departments and Regional Partners

**Task 2: Kick-off Meeting**

Staff and consultant will participate in an in person or virtual project kick-off meeting led by the consultant. The purpose of the meeting is to discuss and understand the project’s objectives, legal context, key issues, goals, schedule, and expectations.

**Task 2 Deliverables:**

- 2.1 Kick-off Meeting

**Task 3: Communications Plan & Stakeholder and Community Engagement**

The consultant in coordination with staff will develop a communication plan to determine how the community will be engaged throughout the process. This will include engaging with various stakeholders that may include but not limited to residents, community organizations, developers, property owners, and local stakeholders. Outreach may include surveys, focus groups, community meetings, and other engagement practices. Engagement should include outreach in all unincorporated Alameda County communities. The consultant will also be responsible for preparing content (graphic and text) for the project website(s) that will be managed by County Staff. Engagement efforts should be coordinated with other related county efforts that include engagement, where feasible. The consultant will also be responsible for preparing a project engagement summary report that will include documentation of engagement efforts, key findings, and lessons learned.

**Task 3 Deliverables:**

- 3.1 Draft and Final Communications Plan
- 3.2 Prepare content including graphics and summaries for Alameda County webpage
- 3.3 Conduct a minimum of 2 focus/facilitated stakeholder engagement group meetings (local stakeholders and developers)
- 3.4 (Optional) Conduct a minimum of 1 community meeting regarding housing policies that includes a presentation to the community and obtain input on draft policies
- 3.5 Project Engagement Summary Report

**Task 4:**

The consultant will develop TOC-compliant Inclusionary Zoning and Ministerial Approval Ordinances for the unincorporated communities of Alameda County, an implementation plan, complete relevant studies to inform their development, environmental determinations, and staffing plans. The ordinances should be separate documents that are actionable by County decisionmakers.

**Task 4 Deliverables:**

- 4.1 (Optional) Draft and Final report on relevant Alameda County policies
- 4.2.1 Inclusionary Zoning Ordinance: Feasibility Study

- 4.2.2 Inclusionary Zoning Ordinance: Alternative Compliance Study
- 4.2.3 Inclusionary Zoning Ordinance: Draft and Final policy and fee recommendation report
- 4.2.4 Inclusionary Zoning Ordinance: Implementation and Staffing Plan
- 4.2.5 Inclusionary Zoning Ordinance: Draft and Final ordinance
- 4.2.6 (Optional) Inclusionary Zoning Ordinance: Environmental Determination and exemption notice
- 4.3.1 Ministerial Approval Ordinance: Identify areas in Zoning Code, Objective Design Standards, Specific Plans, and General Plans in need of updating
- 4.3.2 Ministerial Approval Ordinance: Draft and Final report studying impacts of proposed ordinance, State law consistency and integration into existing ministerial processes.
- 4.3.3 Ministerial Approval Ordinance: Draft and Final ordinance, including amendments to objective design standards, specific plans and existing sections of the Zoning Code.
- 4.3.4 (Optional) Ministerial Approval Ordinance: Environmental Determination and exemption notice
- 4.3.5 Ministerial Approval Ordinance: Implementation and Staffing Plan

**Task 5: Public Hearings and Presentations**

County Staff and the Project Manager (consultant) will present information to Alameda County councils, committees, and the Board of Supervisors to provide updates, gather public feedback and consider adoption of the TOC compliant policies developed through this grant.

**Task 5 Deliverables:**

- 5.1 Attend and present to councils, committees, Planning Commission and the Board of Supervisors to provide technical support, public updates, receive public feedback, and consider adoption of the policies. Public meetings presented to may include the Eden Area Municipal Advisory Council (MAC), the Castro Valley MAC, the Fairview MAC, the Sunol Community Advisory Council (CAC), the East County MAC, the Planning Commission, the Unincorporated Services Committee of the Board of Supervisors, the Transportation & Planning Committee of the Board of Supervisors, and the Board of Supervisors, for up to 10 meetings over the course of this project.
- 5.2 Preparation of draft and final presentation materials.

**C. BACKGROUND**

Unincorporated Alameda County includes six (6) Census Designated Places: Ashland, Castro Valley, Cherryland, Fairview, San Lorenzo, and Sunol. Unincorporated Alameda County also includes communities located in the foothills of the Coastal Range and in the eastern part of the County. Unincorporated Alameda County prides itself on its growing, diverse population of almost 150,000 people and its wealth of natural resources.

The Transit-Oriented Communities Policy (TOC Policy) is an initiative developed by the Metropolitan Transportation Commission to support the region's transit investments by ensuring communities around transit stations are places that support transit ridership as well as the lives of residents of all abilities, income levels, and racial and ethnic backgrounds. MTC

adopted the policy in 2022 and finalized administrative guidance in September 2024. The policy supports Plan Bay Area 2050, the region's long-range plan.

In Fall 2024 MTC made \$20 million in planning grants available to jurisdictions interested in seeking compliance with the TOC Policy. Alameda County Community Development Agency (CDA) applied for 4 separate planning grants in November 2024. MTC approved the allocation of \$2.1 million in grant funding to Alameda County CDA's projects on March 26, 2025. \$400,000 was awarded for work towards Housing Policy compliance. The County is committed to pursuing compliance in order to maintain future OBAG and discretionary funding by ABAG.

To date, Alameda County is working towards full or partial compliance with the following TOC Housing policies:

- Preservation Policy 'Public/Community Land Trusts'
- Preservation Policy 'Mobile Home Preservation.'
- Protection Policy 'Just Cause Eviction'

County staff have identified the following policies to propose for adoption to achieve TOC compliance:

- Production Policy 'Inclusionary Housing Zoning Ordinance'
- Production Policy 'Ministerial Approval'
- Protection Policy 'Tenant Anti-Harassment Protections'

Alameda County Housing and Community Development staff will concurrently work on the development of Tenant Anti-Harassment Protections ordinance while the selected consultant will work with county staff to develop the two production policies, the Inclusionary Housing Zoning Ordinance and Ministerial Approval Ordinance.

In December 2024, the Alameda County Board of Supervisors adopted the 6<sup>th</sup> Cycle Housing Element. The following policies and programs are relevant:

- Housing Element, Goal 1: Accommodate a range of housing for persons of all income levels in accordance with the County's Regional Housing Needs Allocation (RHNA). Pursuing and implementing the policies described in this section would incentivize lower income housing construction. These newly constructed units would count towards the 2023-2031 RHNA cycle and subsequent RHNA cycles.
- Housing Element, Goal 2: Ensure a wide range of housing types to accommodate the housing needs of moderate- and lower-income residents and households. Pursuing and implementing the TOC requirements described in this section would incentivize lower income housing construction.
- Housing Element, Goal 3: Mitigate constraints to housing development and affordability. Pursuing and implementing the production TOC requirements described in this section would further mitigate the existing permitting constraints for housing projects.

- Housing Element, Policy 3.8: State and Regional Housing Designations. This policy recommends that staff pursue compliance with policies such as the MTC TOC Policy to increase access to funding.
- Housing Element, Goal 5: Conserve and improve the existing housing stock to enhance quality of life and provide greater housing stability. Pursuing and implementing the preservation TOC requirements described in this section would help conserve existing affordable housing stock.
- Housing Element, Goal 6: Ensure fair housing opportunity for all persons without discrimination in accordance with State and federal law. Pursuing and implementing the TOC requirements described in this section would contribute to fair housing opportunity.
- Housing Element, Program 6.J: Inclusionary Housing. This program commits the County to pursuing an inclusionary zoning policy in 2025. The TOC planning grant would enable staff to complete this program more easily.

D. BIDDER QUALIFICATIONS

1. Bidder Minimum Qualifications
2. Bidder must be regularly and continuously engaged in the business of providing the following land use planning services: writing and managing the adoption of zoning ordinances and planning policy documents; conducting community engagement and public presentations on policy and regulatory document updates; maintaining knowledge of current state housing laws, housing development processes and practices, and market-rate economics; and conducting environmental review on policy and regulatory document updates for at least three (3) years, which must be clearly stated or demonstrated in the bid response.
3. Bidder must possess all permits, licenses, and professional credentials necessary to supply products and perform services specified under this RFP. Unless noted otherwise in the RFP, for example the item(s) stated above, including any Addendum. Bidder is not required to submit copies or verification of the permits, licenses and credentials; however, Bidder must provide such proof if requested by County.

E. SPECIFIC REQUIREMENTS

Stated generally, existing problems that Alameda County hopes to solve can be summed up as the County does not meet MTC's Transit-Oriented Communities (TOC) Housing Policies, which are designed to expand the region's housing supply—particularly affordable housing. The absence of an inclusionary zoning and a streamlining ordinance constrains the County's ability to meet housing needs.

The selected Contractor(s) will have demonstrated expertise in land use planning, especially policy and ordinance drafting; significant knowledge of current state housing laws, housing development processes and practices, and market-rate economics; and expertise in conducting

stakeholder engagement and community outreach, especially among low-income and underserved communities (i.e. seniors, the disabled, persons with limited English proficiency, etc.) The Contractor(s) will be expected to become familiar with the unincorporated communities, the County's General Plans, and related policies and plans.

County staff will undertake the following roles and responsibilities for the project:

- Lead and provide oversight of the Contractor(s) work progress and execution of tasks.
- Provide the Contractor(s) with previous and current data and work drafted or completed in relation to the project.
- Address and respond to any input, recommendations or solutions suggested by the Contractor(s) to advance the quality of the project scope, tasks and deliverables.
- Review and approve the Contractor(s)'s draft and final work products.
- Monitor task completion status against project deliverables and invoices rendered.
- Coordinate any modification, changes, or amendments to the scope and/or Task Order, should changes or additional or alternate resources or budget be required to complete the project.
- Participate in engagement efforts.

County staff will also undertake the following task:

- Staff will compile and provide the Contractor(s) with a list of County service providers, CBO's (non-profit groups that work at a local level to improve life for residents and may be representative of significant segments of a community) and other stakeholders who may be willing to serve as partners for disseminating information for community outreach and engagement and a list of community events in the unincorporated areas.

The Contractor(s)'s role and responsibilities include the following:

- Support and work in coordination with County staff on project development
- Plan, analyze and recommend solutions to advance the quality of the project scope, tasks, schedule and deliverables, that are tailored to the County's needs and its diversity of stakeholder and community members
- Manage the project, including taking the lead on scheduling and facilitating meetings with clear goals and agendas with the County staff, and be available for weekly check-ins with County staff by email or phone about project progress. The consultant will be responsible for preparing meeting minutes and distributing them to the team.
- Provide County staff with the opportunity to review and comment on all deliverables at least two (2) times, with the exception of the draft ordinances. The consultant will provide County staff with the opportunity to review and comment on the ordinances at least three (3) times before finalizing.
- Attend meetings both virtually and in person with County staff and respond to emails.
- Lead the execution, management and completion of all tasks and deliverables below.

The Contractor(s)' tasks are:

- Task 1
- Task 2

- Task 3
- Task 4
- Task 5

## F. REPORTS/DELIVERABLES

The Contractor(s) are responsible for the following deliverables:

### Task 1 Deliverables:

- 1.1 Draft Project Schedule (update as needed)
- 1.2 (Optional) Monthly progress reports
- 1.3 Bi-weekly Team meetings (as needed and PM to lead and provide meeting meetings)
- 1.4 Quarterly invoicing
- 1.5 Maintenance of project budget
- 1.6 Maintenance of Project Materials Folder
- 1.7: Facilitate collaboration and coordinate with County and Regional Partners

### Task 2 Deliverables:

- 2.1 Kick-off Meeting

### Task 3 Deliverables:

- 3.1 Draft and Final Communication Plan
- 3.2 Prepare content including graphics and summaries for Alameda County webpage
- 3.3 Conduct a minimum of 2 focus/facilitated stakeholder engagement group meetings (local stakeholders and developers)
- 3.4 (Optional) Conduct a minimum of 1 community meeting regarding housing policies that includes a presentation to the community and obtain input on draft policies
- 3.5 Project Engagement Summary Report

### Task 4 Deliverables:

- 4.1 (Optional) Draft and Final report on relevant Alameda County policies
- 4.2.1 Inclusionary Zoning Ordinance: Feasibility Study
- 4.2.2 Inclusionary Zoning Ordinance: Alternative Compliance Study
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- 4.2.6 (Optional) Inclusionary Zoning Ordinance: Environmental Determination and exemption notice
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- 4.3.2 Ministerial Approval Ordinance: Draft and Final report studying impacts of proposed ordinance, State law consistency and integration into existing ministerial processes.
- 4.3.3 Ministerial Approval Ordinance: Draft and Final ordinance, including amendments to objective design standards, specific plans and existing sections of the Zoning Code.

4.3.4 (Optional) Ministerial Approval Ordinance: Environmental Determination and exemption notice

4.3.5 Ministerial Approval Ordinance: Implementation and Staffing Plan

Task 5 Deliverables:

5.1 Presentations to provide public updates, receive public feedback, and consider adoption of the policies. Public meetings presented to may include but are not limited to the Eden Area Municipal Advisory Council (MAC), the Castro Valley MAC, the Fairview MAC, the Planning Commission, the Unincorporated Services Committee of the Board of Supervisors, the Transportation & Planning Committee of the Board of Supervisors, and the Board of Supervisors, for up to 10 meetings.

5.2 Preparation of draft and final presentation materials.

G. NETWORKING / BIDDERS CONFERENCE

The Networking/Bidders Conference will be held virtually, only on the date specified in the Calendar of Events. Bidders can opt to participate via a computer with a stable internet connection (the recommended Bandwidth is 512Kbps) at:

**Zoom link:**

<https://us02web.zoom.us/j/83063559335?tk=MRsSbwxC3anvaVWPHh30ZT2ZWDwcJeKkF73TCBwspy0.DQcAAAATVvlUpY2REFWbGJIU1lxT1RmaENVOF8wYzFBAAAAAAAAAAAAAA>

**Or join via audio**

US: [+16699009128](tel:+16699009128),[83063559335](tel:+183063559335) or [+16694449171](tel:+16694449171),[83063559335](tel:+183063559335)

Or dial: US: +1 669 900 9128 or +1 669 444 9171 or +1 253 215 8782 or +1 346 248 7799 or +1 719 359 4580 or +1 253 205 0468 or +1 309 205 3325 or +1 312 626 6799 or +1 360 209 5623 or +1 386 347 5053 or +1 507 473 4847 or +1 564 217 2000 or +1 646 558 8656 or +1 646 931 3860 or +1 689 278 1000 or +1 301 715 8592 or +1 305 224 1968

[More International numbers](#)

Webinar ID: 830 6355 9335

Information regarding the RFP will be presented during the conference(s). To get the best experience, the County recommends that Bidders who participate remotely use equipment with audio output such as speakers, headsets, or a telephone.

Bidders Conference will be held to:

1. Provide an opportunity for Small Local Emerging Businesses (SLEBs) and large firms to network and develop subcontracting relationships in order to participate in the contract(s) that may result from this RFP.

2. Provide an opportunity for Bidders to ask specific questions about the project and request RFP clarification.
3. Provide the County with an opportunity to receive feedback regarding the project and RFP.

The Bidders Conference Attendees List will be released in a separate document.

Only written questions submitted via email by the stated deadline will be addressed in a posted RFP Questions and Answers (Q&A) following the Bidders Conference. Should there be a need to amend or revise the RFP, an Addendum will be issued. Any verbal statements, including at any Bidders Conference are not binding. Only the written documents will be binding.

All questions regarding these specifications, terms, and conditions are to be submitted in writing via email by 5:00 p.m. on the date specified in the Calendar of Events to:

Angelica González, Senior Planner  
Alameda County, Community Development Agency  
Planning Department  
E-Mail: [Angelica.Gonzalez@acgov.org](mailto:Angelica.Gonzalez@acgov.org)  
Phone: (510) 670-6524

Attendance at the Bidders Conference is highly recommended but are not mandatory. Vendors who attend the Bidders Conference will be added to the Vendor Bid List.

## II. COUNTY PROCEDURES, TERMS, AND CONDITIONS

### A. EVALUATION CRITERIA / SELECTION COMMITTEE

**Initial Evaluation (Completeness of Response and Debarment and Suspension).** All proposals will first be reviewed to determine if they pass the initial Evaluation Criteria (Section A), which are determined on a pass/fail basis.

**Evaluation by County Selection Committee.** All proposals that have passed the initial Evaluation Criteria will be evaluated by a County Selection Committee (CSC). The CSC may be composed of County staff and other parties that may have expertise or experience related to the goods or services that are being procured. The CSC will score the proposals according to the Evaluation Criteria set forth in this RFP. Other than the initial pass/fail Evaluation Criteria, the evaluation of the proposals will be within the sole judgment and discretion of the CSC.

**Unrealistic Bids.** Bidders should bear in mind that any proposal that is unrealistic in terms of the technical or schedule commitments or unrealistically high or low in cost may be deemed reflective of an inherent lack of technical knowledge or indicative of a failure to comprehend the complexity and risk of the County's requirements as set forth in this RFP.

**Price Discrepancy.** In the case of a discrepancy between the unit price and an extension, the unit price will be used for evaluation purposes.

**Evaluation Criteria Descriptions.** The items listed in the Evaluation Criteria should be considered as minimum requirements. All information contained in a proposal and presented in oral interviews will be considered during the evaluation process and included in scoring within the appropriate Evaluation Criteria. Much of the material needed to present a comprehensive proposal can be placed into one of the sections listed. However, other criteria may be added to further support the evaluation process whenever such additional criteria are deemed appropriate in considering the nature of the services being solicited.

**Evaluation Scores.** Proposals will be evaluated and scored on the zero to five-point scale within each Evaluation Criteria below. Scores for all Evaluation Criteria (see the section below) will then be added, according to their assigned weight (below), to arrive at a weighted score for each proposal. A proposal with a higher-weighted total will be deemed of higher quality than a proposal with a lesser-weighted total.

**Shortlist Process.** The evaluation process may include a two-stage approach including a preliminary evaluation of the written proposal and preliminary scoring to develop a shortlist of Bidders that will continue to the final stage of optional vendor interview, and reference checks. The preliminary scoring will be based on the total points, excluding any points allocated to references and oral interview. The 3 Bidders receiving the highest preliminary scores may advance to the next evaluation phase. All other Bidders will be deemed eliminated from the process. All Bidders will be notified of the shortlist participants; however, the preliminary scores at that time will not be communicated to Bidders.

**Reference Checks.** The County reserves the right to conduct reference check(s) on all Bidders who submitted a bid proposal. The CSC will then score the reference check(s), as identified in the Evaluation Criteria below, which will then be included in the final score.

**Oral Interviews.** The County may in its sole discretion, conduct vendor interviews. Should the County opt to conduct a vendor interview, the interview may include responding to standard and specific questions from the CSC regarding the Bidders' proposal. Whether or not a shortlist process is used, the score of any evaluation criterion below may be revised or informed based on the vendor interview.

**Final Score.** The final maximum score for any procurement is 143 points, including the possible 13 points for local and small, local and emerging, or local preference points (maximum 10% of the final score; derived from 5% for local preference and 5% for either Small and Local or Emerging and Local preference). Proposals will be ranked by their final scores. In procurements where there are oral interviews, the CSC will consider the interview and may adjust the scores received by the evaluation of the written proposal which, with the reference scores added, will be the final score.

**Contact During Evaluation Process.** All contact during the evaluation phase must be through the Planning Department only. Bidders must neither contact nor lobby CSC during the

evaluation process. Attempts by Bidders to contact and/or influence members of the CSC may result in disqualification of Bidders.

**Determining Award.** As a result of this RFP, the County intends to award a contract to the highest-ranked responsible Bidder(s), as determined by the combined weight of the Evaluation Criteria, whose response conforms to the RFP and whose bid presents the greatest value to the County considering all Evaluation Criteria. The combined weight of the Evaluation Criteria is greater in importance than the cost in determining the best value to the County. The County may award a contract of higher qualitative competence over the lowest priced response.

The zero to five-point scale range is defined as follows:

|   |                         |   |
|---|-------------------------|---|
| 0 | Not Acceptable          | Non-responsive, fails to meet RFP specifications. The approach has no probability of success. If the unmet specification is a mandatory requirement, this score may result in the disqualification of the proposal.       |
| 1 | Poor                    | Below average, falls short of expectations, is substandard to that which is the average or expected norm, has a low probability of success in achieving objectives per RFP.   |
| 2 | Fair                    | Has a reasonable probability of success; however, some objectives may not be met.   |
| 3 | Average                 | Acceptable and likely to achieve all objectives in a reasonable fashion per RFP specification. This will be the baseline score for each item with adjustments based on the interpretation of the proposal by CSC members. |
| 4 | Above Average / Good    | Better than that which is average or expected as the norm. Excellent probability of success in achieving all objectives of the RFP requirements and expectations.   |
| 5 | Excellent / Exceptional | Exceeds expectations, is very innovative, clearly superior to that which is average or expected as the norm. Excellent probability of success in achieving all objectives and meeting RFP specifications.                 |

The Evaluation Criteria and their respective weights are as follows:

|    | <b>Evaluation Criteria</b>   | <b>Weight</b> |
|----|--|---------------|
| A. | <p><b>Completeness of Response:</b><br/>Responses to this RFP must be complete. Responses that do not include the proposal content requirements identified within this RFP and subsequent Addenda and do not address each of the items listed below will be considered incomplete, be rated a Fail in the Evaluation Criteria and will receive no further consideration.</p> | Pass/Fail     |

|    | <b>Evaluation Criteria</b>   | <b>Weight</b> |
|----|--|---------------|
| B. | <p><b>Debarment and Suspension:</b><br/>Bidders, its principal and named subcontractors are not identified on the list of Federally debarred, suspended or other excluded parties located at <a href="http://www.sam.gov/SAM/">www.sam.gov/SAM/</a>.</p>   | Pass/Fail     |
| C. | <p><b>Cost:</b><br/>The points for Cost will be computed by dividing the amount of the lowest responsive and responsible bid received by each Bidder's total proposed cost. Cost evaluation points may be adjusted by considering:</p> <ol style="list-style-type: none"> <li>1. Reasonableness (i.e., how well does the proposed pricing accurately reflect the Bidder's effort to meet requirements and objectives?).</li> <li>2. Realism (i.e., is the proposed cost appropriate to the nature of the products and/or services to be provided?).</li> </ol>   | 15 Points     |
| D. | <p><b>Understanding of the Project:</b><br/>Proposals will be evaluated against the RFP specifications and the questions below:</p> <ol style="list-style-type: none"> <li>1. Has the proposer demonstrated a thorough understanding of the purpose and scope of the project?</li> <li>2. How well has the proposer identified pertinent issues and potential problems related to the project?</li> <li>3. Has the proposer demonstrated that it understands the deliverables the County expects it to provide?</li> <li>4. Has the proposer demonstrated that it understands the County's time schedule and can meet it?</li> </ol>   | 20 Points     |
| E. | <p><b>Relevant Experience and Quality of Work:</b><br/>Proposals will be evaluated against the RFP specifications and the questions below:</p> <ol style="list-style-type: none"> <li>1. Do the individuals assigned to the project have experience on relevant projects?</li> <li>2. How extensive is the applicable education and experience of the personnel designated to work on the project, including with land use planning, housing, and equitable community engagement?</li> <li>3. Has the bidder demonstrated ability to design and implement an appropriate and equitable communications plan?</li> <li>4. Does the bidder demonstrate the ability to provide multi-lingual communications?</li> <li>5. Has the bidder demonstrated expertise and experience in land use planning, the economics of housing construction, facilitation and community engagement in</li> </ol> | 20 Points     |

|    | <b>Evaluation Criteria</b>   | <b>Weight</b>   |
|----|--|---|
|    | <p>low-income and underserved communities, working with local government, multi-stakeholder planning processes?</p> <p>6. Has the bidder demonstrated sufficient familiarity with housing policies and strategies to translate technical concepts into outreach materials and written policy?</p>  |   |
| F. | <p><b>Description of Proposed Services:</b><br/>Proposals will be evaluated considering the RFP specifications and the questions below:</p> <ol style="list-style-type: none"> <li>1. How well has Bidder demonstrated a thorough understanding of the purpose and scope of the project?</li> <li>2. How well does the description of proposed services depict a logical approach to fulfilling the requirements of the RFP</li> <li>3. How well does the description of proposed services achieve all the requirements in the RFP, including the deliverables and reports the County expects it to provide?</li> <li>4. How thorough, thoughtful, and relevant is Bidder’s plan to collect data to monitor the progress of the proposed services?</li> <li>5. How well has Bidder identified pertinent issues and potential problems related to the project?</li> <li>6. How well has Bidder addressed culturally appropriate services; including accommodations for language and/or cultural differences?</li> </ol> | 20 Points   |
| G. | <p><b>Methodology:</b><br/>Proposals will be evaluated against the RFP specifications and the questions below:</p> <ol style="list-style-type: none"> <li>1. Does the methodology depict a logical approach to fulfilling the requirements of the RFP?</li> <li>2. Does the methodology match and contribute to achieving the objectives set out in the RFP?</li> <li>3. Does the methodology interface with the County’s time schedule?</li> </ol>  | 20 Points   |
| H. | <p><b>Oral Interview</b><br/>Should the County opt to conduct a vendor interview, the interview may include responding to standard and specific questions from the CSC regarding the Bidder’s proposal. Whether or not a shortlist process is used, the scores of any evaluation criterion above may be revised or informed based on the vendor interview.</p>   | Vendor Interview may be used to revise / inform scores of |

|   | <b>Evaluation Criteria</b>  | <b>Weight</b>  |
|---|---|----------------|
|   |   | criteria above |
| I.  | <p><b>Budget Justification, Fiscal Practice, and Budget Form</b><br/>Proposals will be evaluated against the RFP specifications and the questions below:</p> <ol style="list-style-type: none"> <li>1. How well does Bidder’s cost capture all activities and staff needed to meet the services requested?</li> <li>2. How well does the Bidder allocate staff and resources?</li> <li>3. How well does the Budget Justification detail how Bidder arrived at particular calculations?</li> <li>4. Is the proposed cost appropriate to the nature of the services to be provided?</li> <li>5. How clear, realistic, and reasonable are costs in relation to the services provided and the number of clients to be served?</li> <li>6. How well does the Bidder outline, and how diverse are, the revenue sources for its organization and the proposed program?</li> <li>7. How well does the Bidder describe its fiscal oversight and management practices?</li> <li>8. How well do staff salaries reflect local costs of living?</li> </ol> | 20             |
| J.  | <b>References (See Exhibit A – Bid Response Packet</b>  | 15 points      |
| <b>SMALL LOCAL EMERGING BUSINESS PREFERENCE</b> |   |                |
|   | <b>Local Preference:</b> Points equaling 5% of Bidder’s total score for the above Evaluation Criteria will be added. This will be the Bidder’s <u>final score</u> for purposes of award evaluation.   | 5%             |
|   | <b>Small and Local or Emerging and Local Preference:</b> Points equaling 5% of Bidder’s total score for the above Evaluation Criteria will be added. This will be the Bidder’s <u>final score</u> for purposes of award evaluation.   | 5%             |

**B. CONTRACT EVALUATION AND ASSESSMENT**

During the initial 60-day period of any contract awarded, the County may review the proposal, the contract, any goods or services provided, and/or meet with the Contractor to identify any issues or potential problems.

The County reserves the right to determine, at its sole discretion, whether:

- The Contractor has complied with all terms of this RFP and the contract; and
- Any problems or potential problems with the proposed goods and/or services were evidenced, which makes it unlikely (even with possible modifications) that such goods and/or services have met or will meet the County requirements.

If, as a result of such determination, the County concludes that it is not satisfied with the Contractor's performance under any awarded contract and/or Contractor's goods and services as contracted for therein, the Contractor may be notified that the contract is being terminated. The Contractor must be responsible for returning County facilities to their original state at no charge to the County. The County will have the right to invite the next qualified Bidder(s) to enter into a contract. The County also reserves the right to re-bid this project if it is determined to be in its best interest to do so. The County's right to go to the next qualified Bidder(s) and/or rebid is not limited by the award of a contract or the 60-day period.

#### C. NOTICE OF INTENT TO AWARD

At the conclusion of the RFP response evaluation process (Evaluation Process), all Bidders will be notified in writing by email or US Postal Service mail of the contract award recommendation, if any, by the Planning Department. The document providing this notification is the Notice of Intent to Award/Non-Award.

The Notice of Intent to Award/Non-Award will provide the following information:

- The name(s) of the Bidder(s) being recommended for contract award; and
- The names of all other parties that submitted proposals.

At the conclusion of the RFP response evaluation process and negotiations, debriefings for unsuccessful Bidders will be scheduled and provided upon written request and will be restricted to discussion of the unsuccessful offeror's bid. Under no circumstances will any discussion be conducted with regard to contract negotiations with the successful Bidder.

The submitted proposals will be made available upon request no later than five calendar days before approval of the award and contract is scheduled to be considered by the Board of Supervisors.

#### D. BID PROTEST / APPEALS PROCESS

1. The County of Alameda prides itself on the establishment of fair and competitive contracting procedures and the commitment made to follow those procedures. The following is provided in the event that Bidders wish to protest the bid process or appeal the recommendation to award a contract once the Notices of Intent to Award/Non-

Award have been issued. Bid protests submitted prior to issuance of the Notices of Intent to Award/Non-Award will not be accepted by the County.

2. Any bid protest must be submitted in writing by 5:00 p.m. on the SEVENTH (7th) calendar day following the date of issuance of the Notice of Intent to Award/ Non-Award, not the date received by the Bidder. The bid protest must be submitted to the office that has been designated for review of protests for this procurement (the Protest Evaluator). For this procurement, the Protest Evaluator is:

Lucy Romo, Director of Operations  
Community Development Agency  
224 W. Winton Avenue  
Hayward, CA 94544

3. A bid protest received after 5:00 p.m. is considered received as of the next calendar day. A protest received after 5:00 p.m. on the SEVENTH (7th) calendar day following the date of issuance of the Notice of Intent to Award/Non-Award will not be considered under any circumstances by the Protest Evaluator or their designee.

Generally, the County will promptly send an email acknowledging receipt of the protest; it is the responsibility of the protestor to confirm that the protest was timely received.

- a. The bid protest must contain a complete statement of the reasons and facts for the protest.
  - b. The protest must refer to the specific portions of all documents that form the basis for the protest.
  - c. The protest must include the name, address, email address, and telephone number of the person submitting the protest on behalf of the protesting party.
  - d. Department Representatives will send a notification to Bidders if a protest is received.
4. The Protest Evaluator, or their designee, will review and evaluate the protest and issue a written decision. The Protest Evaluator may, at its discretion, do any of the following: investigate the protest, obtain additional information, provide an opportunity to settle the protest by mutual agreement, and/or schedule a meeting(s) with the protesting Bidder and others (as appropriate) to discuss the protest. The decision on the bid protest must be final prior to the Board hearing.

A notification of the decision will be communicated by email and/or US Postal Service mail to the protestor. Notification will be provided to Bidders when a decision has been made on the protest and whether or not the recommendation to the Board of Supervisors in the Notice of Intent to Award/ Non-Award will stand.

5. The decision on the bid protest by the Protest Evaluator may be appealed to the Auditor-Controller's Office of Contract Compliance & Reporting (OCCR) located at 1221 Oak St., Room 249, Oakland, CA 94612, Email: [OCCR@acgov.org](mailto:OCCR@acgov.org), unless the OCCR determines that it has a conflict of interest in which case an alternate will be identified to hear the appeal and all steps to be taken by OCCR will be performed by the alternate. The Bidder whose bid is the subject of the protest, all Bidders affected by the Protest Evaluator's decision on the protest, and the protestor have the right to appeal if they feel the Protest Evaluator's decision is incorrect. All appeals to the Auditor-Controller's OCCR must be in writing and submitted within SEVEN (7) calendar days following the issuance of the decision, not the date the decision is received by the Bidder. An appeal received after 5:00 p.m. is considered received as of the next calendar day. An appeal received after 5:00 p.m. on the SEVENTH (7th) calendar day following the date of issuance of the decision by the Protest Evaluator will not be considered under any circumstances by the Auditor-Controller OCCR or their designee.
  - a. The appeal must specify the decision being appealed and all the facts and circumstances relied upon in support of the appeal.
  - b. In reviewing protest appeals, the OCCR will not re-judge the proposal(s). The appeal to the OCCR must be limited to a review of the procurement process to determine if the contracting department materially erred in following the bid or, if applicable, County contracting policies or other laws and regulations.
  - c. The appeal to the OCCR must be limited to the grounds raised in the original protest and the written decision by the Protest Evaluator. As such, a Bidder is prohibited from stating new grounds for a Bid protest in its appeal.
  - d. The Auditor's Office may overturn the results of a bid process for ethical violations by Procurement staff, County Selection Committee members, subject matter experts, or any other County staff managing or participating in the competitive bid process, regardless of timing or the contents of a bid protest.
  - e. The finding of the Auditor-Controller's OCCR is the final step of the appeal process. A copy of the finding of the Auditor-Controller's OCCR will be furnished to the protestor.
  - f. The finding on the appeal must be issued before a recommendation to award the contract is considered and contract awarded by the Board of Supervisors.
6. The procedures and time limits set forth in this section are mandatory and are each Bidder's sole and exclusive remedy in the event of a bid protest. A Bidder's failure to timely complete both the bid protest and appeal procedures will be deemed a failure to exhaust administrative remedies. Failure to exhaust administrative remedies, or failure to comply otherwise with these procedures, will constitute a waiver of any right to further pursue the bid protest, including filing a Government Code Claim or legal proceedings.

E. TERM / TERMINATION / RENEWAL

1. The contract term, which may be awarded pursuant to this RFP, will be TWENTY-TWO (22) months.
2. By mutual agreement, any contract, which may be awarded pursuant to this RFP, may be extended for an additional two-years.
3. The County has and reserves the right to suspend, terminate or abandon the execution of any work, services and/or providing of goods by the Contractor without cause at any time upon giving the Contractor prior written notice. In the event that the County should abandon, terminate or suspend the Contractor's work, services and/or providing of goods, the Contractor will be entitled to payment for services provided hereunder prior to the effective date of said suspension, termination, or abandonment. The County may terminate the contract at any time for cause without written notice upon a material breach of contract or substandard or unsatisfactory performance by the Contractor. In the event of termination with cause, the County reserves the right to seek any and all damages from the Contractor. In the event of such termination, with or without cause, the County reserves the right to invite the next highest-ranked Bidder to enter into a contract or rebid the project if it is determined to be in its best interest to do so.

F. PRICING

1. All pricing as quoted will not increase, but except as noted below, remain fixed and firm for the term of any contract that may be awarded as a result of this RFP.
2. Unless otherwise stated, Bidder agrees that, in the event of a price decline, the benefit of such a lower price will be extended to the County.
3. Reasonable price increases or decreases for subsequent contract terms may be negotiated between Contractor and County after completion of the initial term.
4. Taxes and freight charges:
  - a. The County is soliciting a total price for this project. The price(s) quoted shall be the total cost the County will pay for this project including all taxes (excluding Sales and Use taxes) and all other charges.
  - b. No charge for delivery, drayage, express, parcel post packing, cartage, insurance, license fees, permits, costs of bonds, or for any other purpose, except taxes legally payable by County, will be paid by the County unless expressly included and itemized in the bid.
  - c. Amount paid for transportation of property to the County of Alameda is exempt from Federal Transportation Tax. An exemption certificate is not required where the

shipping papers show the consignee as Alameda County; as such papers may be accepted by the carrier as proof of the exempt character of the shipment.

- d. Articles sold to the County of Alameda are exempt from certain Federal excise taxes. The County will furnish an exemption certificate.
5. All prices quoted shall be in United States dollars and "whole cent," no cent fractions shall be used. There are no exceptions.
6. A total price is required for this contract and will be the maximum price the County will pay.
7. Price quotes must include any and all payment incentives available to the County.
8. In the evaluation of cost, if applicable, it will be assumed that the unit price quoted is correct in the case of a discrepancy between the unit price and an extension, and the Bidder must honor the unit price quoted.
9. Federal and State minimum wage laws apply. The County has no requirements for living wages. The County is not imposing any additional requirements regarding wages.

**G. AWARD**

1. Proposals will be evaluated by a committee and will be ranked in accordance with the RFP section titled "Evaluation Criteria/Selection Committee."
2. Most Responsive and Responsible Bidder(s)
  - a. The award will be made to the highest-ranked Bidder(s) who meet the requirements of these specifications, terms, and conditions.
  - b. Awards may also be made to the subsequent highest ranked Bidder(s) who will be called in order should the County need to contract with another Bidder(s).
  - c. An award will be recommended for the Bidder(s) that submitted the proposal(s) that best serves the overall interests of the County by attaining the highest overall point score. The award may not necessarily be made to the Bidder(s) with the lowest price.
3. Small and Emerging Locally Owned Business
  - a. The County is vitally interested in promoting the growth of small and emerging local businesses by means of increasing the participation of these businesses in the County's purchase of goods and services.
  - b. As a result of the County's commitment to advance the economic opportunities of these businesses, Bidders must meet the County's Small and Emerging Locally

Owned Business requirements in order to be considered for the contract award. These requirements can be found online at:

[Alameda County SLEB Program Overview](http://acgov.org/auditor/sleb/overview.htm)  
[<http://acgov.org/auditor/sleb/overview.htm>]; and

[Alameda County SLEB Program Additional Information](https://gsa.acgov.org/do-business-with-us/vendor-support/small-local-and-emerging-businesses/)  
[<https://gsa.acgov.org/do-business-with-us/vendor-support/small-local-and-emerging-businesses/>]

- c. For purposes of this procurement, applicable industries include, but are not limited to, the following North American Industry Classification System (NAICS) Code(s): 541990, 541490.
  - d. A small business is defined by the [United States Small Business Administration](#) (SBA) as having no more than the number of employees or average annual gross receipts over the last three years required per SBA standards based on the small business's appropriate NAICS code.
  - e. An emerging business is defined by the County as having either annual gross receipts of less than one-half that of a small business OR having less than one-half the number of employees AND that has been in business for less than five years.
4. County Rights
- a. The County reserves the right to reject any or all responses that materially differ from any terms contained in this RFP or from any Exhibits attached hereto, to waive informalities and minor irregularities in responses received, and to provide an opportunity for Bidders to correct minor and immaterial errors contained in their submissions. The decision as to what constitutes a minor irregularity shall be made solely at the discretion of the County.
  - b. Any proposal/bids that contain false or misleading information may be disqualified by the County.
  - c. The County reserves the right to award to a single or multiple Contractors.
  - d. The County reserves the right to conduct additional procurements for the same or similar goods and/or services or to award to additional contract(s), including to other Bidder(s), during the term of the contract if it determines that additional Contractors are needed to supplement goods and/or services being provided.
  - e. The County has the right to decline to award this contract or any part thereof for any reason.
5. Procedures

- a. Board approval to award a contract is required.
- b. A contract must be fully executed by the recommended awardee and the County prior to any services and goods being provided or work being performed
- c. The County uses its Standard Services Agreement terms and conditions for purchases and services. Any terms that are not acceptable to a Bidder must be identified on the Exceptions and Clarifications form in Exhibit A - Bid Response Packet. Bidder may access a copy of the Standard Services Agreement template at: <http://www.acgov.org/gsa/purchasing/standardServicesAgreement.pdf>

The template contains minimal Agreement boilerplate language only.

- d. The RFP specifications, terms, conditions and Exhibits, RFP Addenda and Bidder's proposal, may be incorporated into and made a part of any contract that may be awarded as a result of this RFP.

#### H. METHOD OF ORDERING

1. A written Purchase Order (PO) and signed Standard Agreement contract will be issued upon Board approval. If there is any conflict in terms of any PO and the executed contract, the contract will control, even if a PO is issued later. Payment cannot be made to any Contractor until a PO is issued.
  - a. POs and Standard Agreements will be transmitted electronically or mailed and shall be the only authorization for the Contractor to place an order
  - b. POs and payments for products and/or services will be issued only in the name of Contractor.
  - c. Contractor shall adapt to changes to the method of ordering procedures as required by the County during the term of the contract.
  - d. Change orders shall be agreed upon by Contractor and County and issued as needed in writing by County.

#### I. WARRANTY

1. Bidder expressly warrants that all goods and services to be furnished pursuant to any contract awarded it arising from the Bid will conform to the descriptions and specifications contained herein. Bidder expressly warrants that all goods and services to be furnished pursuant to such award will be fit and sufficient for the purpose(s) intended. This warranty shall survive any inspections, delivery, acceptance or payment by the County. Bidder warrants that all work and services furnished hereunder shall be guaranteed for a period of three (3) years from the date of acceptance by the County.

J. INVOICING

1. Contractor must invoice the requesting department quarterly, unless otherwise directed by County, upon satisfactory receipt of goods and/or performance of services.
2. County will use reasonable efforts to make payment within 30 days following receipt and review of invoice and complete satisfactory receipt of goods and/or performance of services.
3. County will notify the Contractor of any adjustments or corrections that must be made to receive payment on an invoice.
4. Invoices submitted by the Contractor must contain the County PO number, invoice number, remit to address, itemized goods and/or services description, and price as quoted and must be accompanied by an acceptable proof of delivery and any other information requested by the County.
5. Contractor must utilize a standardized invoice format upon request.
6. Invoices must be issued by, and payments made to, the Contractor who is awarded a contract.
7. The County will pay the Contractor, after receipt and approval of an invoice, quarterly or as agreed upon, not to exceed the total contract amount. The County will not pay for goods and/or services in advance.
8. In the event the Contractor's performance and/or deliverable goods have been deemed unsatisfactory by a review committee, the County reserves the right to withhold future payments until the performance and/or deliverable goods are deemed satisfactory.

K. LIQUIDATED DAMAGES

1. In the event the Contractor's performance and/or deliverable projects have been deemed unsatisfactory by a review committee, the County reserves the right to withhold future payments until the performance and or deliverable projects are deemed satisfactory.

L. PERFORMANCE REQUIREMENTS

1. Contractor shall comply with all the terms of this contract, as may be modified periodically at the sole discretion of the County Community Development Agency, including but not limited to providing all deliverables, attendance at all

- meetings and public hearings, staying within the budget, and meeting the letter and intent of the project scope.
2. Contractor shall comply with all scheduling and deadline requirements of this contract, as may be modified periodically at the sole discretion of the County Community Development Agency.
  3. Contractor shall provide to the County Community Development Agency all documents in both .pdf, bound paper copies, and editable electronic file formats, to the satisfaction of the County Community Development Agency.

**M. ACCOUNT MANAGER / SUPPORT STAFF**

1. Contractor shall provide a dedicated competent account manager who shall be responsible for the County account/contract. The account manager shall receive all orders from the County and shall be the primary contact for all issues regarding Bidder's response to this RFP and any contract which may arise pursuant to this RFP.
2. Contractor shall also provide adequate, competent support staff that shall be able to service the County during normal working hours, Monday through Friday. Such representative(s) shall be knowledgeable about the contract, products and/or services offered and able to identify and resolve quickly any issues including but not limited to order and invoicing problems.
3. Contractor account manager shall be familiar with County requirements and standards and work with the Community Development Agency to ensure that established standards are adhered to.

**III. INSTRUCTIONS TO BIDDERS**

**A. COUNTY CONTACTS**

1. The Alameda County Planning Department is managing the competitive process for this project on behalf of the County. All contact during the competitive process is to be through the Planning Department only. Any communication regarding this RFP with other County personnel may result in disqualification.
2. The evaluation phase of the competitive process will begin upon receipt of sealed bid proposals and continue until a contract has been awarded.

Contact Information for this RFP:

Angelica González, Senior Planner  
Alameda County, Community Development Agency – Planning Department

224 W. Winton Avenue, Room 111  
Hayward, Ca 94544  
Email: [Angelica.Gonzalez@acgov.org](mailto:Angelica.Gonzalez@acgov.org)  
Phone: 510-670-5400

3. The GSA Contracting Opportunities website and [County of Alameda, CA Procurement Portal](#) will be the official notification posting place of all bid documents related to this RFP. Each Bidder is responsible for checking the website for any Addendums and other notices related to this RFP. Go to [Alameda County Current Contracting Opportunities \[https://gsa.acgov.org/do-business-with-us/contracting-opportunities/\]](#) and [County of Alameda, CA Procurement Portal \[https://procurement.opengov.com/portal/acgov\]](#) to view the posting for this RFP and other current contracting opportunities.

**B. SUBMITTAL OF PROPOSALS**

1. Document Submittal
  - a. All proposal documents must be submitted to Angelica González via email ONLY to [angelica.gonzalez@acgov.org](mailto:angelica.gonzalez@acgov.org) by 2:00 p.m. on the due date specified in the Calendar of Events.
  - b. Bidders must submit an electronic version of their proposal in a PDF file, preferably a single file if 20 MB or less.
  - c. The submitted proposal must conform to and include Exhibit A – Bid Response Packet, as amended or revised by Addendum, including additional required documentation. A Bidder may be disqualified if the most current version of Exhibit A, as revised and published through Addenda, is not used.
  - d. All costs required for the preparation and submission of a bid shall be borne by Bidder.
  - e. Only one bid response will be accepted from any one person, partnership, corporation, or other entity; however, several alternatives may be included in one response. For purposes of this requirement, “partnership” shall mean, and is limited to, a legal partnership formed under one or more of the provisions of the California or other state’s Corporations Code or an equivalent statute.
  - f. In whole or in part, proposal responses are NOT to be marked confidential or proprietary. The County may refuse to consider any proposal or part thereof so marked. Bid proposals submitted in response to this RFP may be subject to public disclosure, even if marked confidential or proprietary. The County will not be liable in any way for disclosure of any such records. Please refer to the County’s website at [Alameda County Proprietary and Confidential Information Policies](#)

[\[https://gsa.acgov.org/do-business-with-us/contracting-opportunities/policies-procedures/proprietary-confidential-information/\]](https://gsa.acgov.org/do-business-with-us/contracting-opportunities/policies-procedures/proprietary-confidential-information/).

- g. For the proposals to be considered complete, the Bidder must provide responses to all information requested in Exhibit A – Bid Response Packet, as revised by any Addenda.

## 2. Submissions Processes

- a. All costs required for the preparation and submission of a proposal must be borne by the Bidder.
- b. Only one bid proposal will be accepted from any one person, partnership, corporation, or other entity; however, several alternatives may be included in one response. For purposes of this requirement, “partnership” will mean, and is limited to, a legal partnership formed under one or more of the provisions of California or other state’s Corporations Code or an equivalent statute.
- c. The final award information will be posted on the County’s “Contracting Opportunities” website.
- d. The County reserves the right to reject any proposal.
- e. All bid proposals must remain open to acceptance and irrevocable for a period of not less than 180 days unless otherwise specified in the bid documents.

## 3. Legal Requirements

- a. “In submitting a bid to a public purchasing body, the Bidder offers and agrees that if the bid is accepted, it will assign to the purchasing body all rights, title, and interest in and to all causes of action it may have under Section 4 of the Clayton Act (15 U.S.C. Sec. or under the Cartwright Act (Chapter 2, commencing with Section 16700, of Part 2 of Division 7 of the Business and Professions Code), arising from purchases of goods, materials, or services by the Bidder for sale to the purchasing body pursuant to the bid. Such assignment shall be made and become effective at the time the purchasing body tenders final payment to the Bidder”. (California Government Code Section 4552).
- b. By submitting a bid proposal, the Bidder expressly acknowledges that it is aware that if a false claim is knowingly submitted (as the terms “claim” and “knowingly” are defined in the California False Claims Act, Cal. Gov. Code, §12650 et seq.), County will be entitled to civil remedies set forth in the

California False Claim Act. Such actions may also be considered fraud and subject to criminal prosecution.

- c. The Bidder, by submitting a proposal, certifies that it is, at the time of bidding, and will be, throughout the period of the contract, licensed by the State of California to do the type of work required under the terms of the RFP and contract documents. Bidder further certifies that it is regularly engaged in the general class and type of work called for in the RFP and contract documents.
- d. The Bidder, by submitting a proposal, certifies that it is not, at the time of bidding, on the California Department of General Services (DGS) list of persons determined to be engaged in investment activities in Iran or otherwise in violation of the Iran Contracting Act of 2010 (Public Contract Code Section 2200-2208).



## EXHIBIT A

### BID RESPONSE PACKET

#### INSTRUCTIONS

1. Please read **EXHIBIT A – Bid Response Packet** carefully; **INCOMPLETE BID PROPOSALS MAY BE REJECTED.** Alameda County will not accept submissions or documentation after the bid response due date. Successful uploading of a document does not equal acceptance of the document by Alameda County
4. The bid proposal must comply with all requirements contained in the RFP. **It is strongly recommended that Bidders verify and review all Addenda to confirm the use of the most current forms and provide all information requested.**
5. The bid proposal submission must conform to and include Exhibit A – Bid Response Packet, as amended or revised by Addendum, including additional required documentation. **A Bidder may be disqualified if the most current version of Exhibit A, as revised and published through Addenda, is not used.**
6. The following pages require confirmation, declaration, and /or a signature (✍). These must be either: (1) be printed and have an original signature(s); or (2) be digitally signed via a DocuSign, CongaSign, or other verifiable independent electronic signature services. All signatures must be by an individual authorized to bind the Bidder. These pages must then be submitted to Angelica González.
  - a. Exhibit A – Bid Response Packet, [Bidder Acceptance](#)
7. Each page of the Bid Response Packet must be submitted with all required information included and documents attached; any pages of the Bid Response Packet not applicable to the Bidders are to be submitted with such pages or items clearly marked “N/A” or the bid proposal may be disqualified as incomplete.
  1. Bidders must not modify the Bid Response Packet or any other County-provided document unless instructed to do so, or the bid proposal may be disqualified.
  2. Excel bid pricing spreadsheet must be submitted to Rodrigo Orduna.
  3. Bidders must quote price(s) as specified in the RFP, using the form(s) as amended or revised by any Addenda.
  4. Any clarifications or exceptions to policies or specifications of this RFP, including all Addenda and other documents must be submitted in the [Exceptions and Clarifications](#) form of the Bid Response Packet.

5. Bidders must read all information and follow directions in the RFP.
6. File names are restricted to 64 characters for all files uploaded as part of any bid proposal. The file extension (e.g., ".pdf" or ".xls") is counted as part of the file name character limit. Attempting to upload a file with a file name longer than 64 characters may result in an error message or failure to load.
7. **Bidders who do not comply with the requirements and/or submit incomplete bid proposal packages are subject to disqualification and their bid proposals rejected.**



# **COUNTY OF ALAMEDA**

## **BID RESPONSE PACKET**

### **TRANSIT-ORIENTED COMMUNITIES HOUSING INITIATIVE**

## BIDDER INFORMATION

|                                    |  |        |  |           |  |
|------------------------------------|--|--------|--|-----------|--|
| Official Name of Bidder (Company): |  |        |  |           |  |
| Street Address Line 1:             |  |        |  |           |  |
| Street Address Line 2:             |  |        |  |           |  |
| City:                              |  | State: |  | Zip Code: |  |
| Webpage:                           |  |        |  |           |  |

### Type of Entity / Organizational Structure (check one):

- Corporation
  Joint Venture
  Partnership  
 Limited Liability Partnership
  Limited Liability Corporation
  Sole Proprietor  
 Non-Profit
  Other:

|  |  |
|--|--|
| Jurisdiction of Organizational Structure:                      |  |
| Date of Organizational Structure:                              |  |
| Federal Tax Identification Number:                             |  |
| Alameda County Supplier Identification Number (if applicable): |  |
| DIR Contractor Registration Number (if applicable):            |  |

### Primary Contact Information:

|                   |  |                   |  |
|-------------------|--|-------------------|--|
| Name / Title:     |  |                   |  |
| Telephone Number: |  | Alternate Number: |  |
| Email Address:    |  |                   |  |

## BIDDER ACCEPTANCE

1. The undersigned declares that the procurement bid documents, including, without limitation, the RFP, Q&A, Addenda, and Exhibits (the Bid Documents), have been read and accepted.
2. The undersigned is authorized, offers, and agrees to furnish the articles and/or services specified in accordance with the Specifications, Terms & Conditions of the Bid Documents of the Transit-Oriented Communities Housing Initiative RFP.
3. The undersigned has reviewed the Bid Documents and fully understands the requirements for this RFP, including, but not limited to, general County requirements, and that each Bidder who is awarded a contract must be, in fact, a prime Contractor, not a subcontractor, to County, and agrees that its bid proposal, if accepted by County, will be the basis for the Bidder to enter into a contract with County in accordance with the intent of the Bid Documents.
4. The undersigned agrees to the following terms, conditions, certifications, and requirements found on the County's website:
  - **General Requirements**  
[<https://gsa.acgov.org/do-business-with-us/contracting-opportunities/policies-procedures/general-requirements/>]
  - **Debarment & Suspension Policy**  
[<https://gsa.acgov.org/do-business-with-us/contracting-opportunities/debarment-suspension-policy/>]
  - **Iran Contracting Act (ICA) of 2010**  
[<https://gsa.acgov.org/do-business-with-us/contracting-opportunities/policies-procedures/iran-contracting-act-of-2010-ica/>]
  - **First Source**  
[<http://acgov.org/auditor/sleb/sourceprogram.htm>]
  - **Online Contract Compliance System** [<http://acgov.org/auditor/sleb/elation.htm>]
  - **Small Local Emerging Business Program** [<http://acgov.org/auditor/sleb/overview.htm>]
  - **General Environmental Requirements**  
[<https://gsa.acgov.org/do-business-with-us/contracting-opportunities/policies-procedures/general-environmental-requirements/>]
5. The undersigned acknowledges that Bidder is and will remain in good standing in the State of California, with all the necessary licenses, permits, certifications, approvals, and authorizations necessary to perform all obligations in connection with this RFP and any contract that is awarded.

6. The undersigned acknowledges that it is the responsibility of each Bidder to be familiar with all of the specifications, terms, and conditions of the RFP and, if applicable, the site condition. By the submission of a bid proposal, the Bidder certifies that if awarded a contract, they will make no claim against the County based upon ignorance of conditions or misunderstanding of the specifications.
7. Patent indemnity: Bidder agrees to hold the County of Alameda, its officers, agents, and employees harmless from liability of any nature or kind, including cost and expenses, for infringement or use of any patent, copyright, or other proprietary rights, secret process, patented or unpatented invention, article or appliance furnished or used in connection with bid proposal and/or any resulted contract or purchase order.
8. The undersigned acknowledges **ONE** of the following (please check only one box):
  - Bidder is not local to Alameda County and is ineligible for any bid preference; **OR**
  - Bidder is a certified SLEB at the time of bid submittal and is requesting 10% bid preference; (Bidder must check the first box and provide its SLEB Certification Number in the [SLEB INFORMATION SHEET](#)); **OR**
  - Bidder is LOCAL to Alameda County and is requesting 5% bid preference, and has attached the following documentation to this Exhibit:
    - Copy of a verifiable business license, issued by the County of Alameda or a City within the County; and
    - Proof of six months business residency, identifying the name of the vendor and the local address. Utility bills, deed of trusts or lease agreements, etc., are acceptable verification documents to prove residency.
9. By signing below, the signatory warrants and represents that the signer has completed, acknowledged, and agreed to this Bidder Acceptance in their authorized capacity and that by their signature on this Bidder Acceptance, they and the entity upon behalf of which they acted, acknowledged and agreed to this Bidder Acceptance and that all are true and correct and are made under penalty of perjury pursuant to the laws of California.

**SIGNATURE:**  \_\_\_\_\_

Name/Title of Authorized Signer: \_\_\_\_\_

Dated this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_\_


**DEBARMENT AND SUSPENSION CERTIFICATION (PROCUREMENTS \$25,000 AND OVER)**

The Bidder, under penalty of perjury, certifies that, except as noted below, Bidder, its principal, and any named and unnamed subcontractor:

- Is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any federal agency;
- Has not been suspended, debarred, voluntarily excluded or determined ineligible by any federal agency within the past three years;
- Does not have a proposed debarment pending; and
- Has not been indicted, convicted, or had a civil judgment rendered against it by a court of competent jurisdiction in any matter involving fraud or official misconduct within the past three years.

If there are any exceptions to this certification, insert the exceptions in the following space. For any exception noted, indicate to whom it applies, initiating agency, and dates of action. Exceptions will not necessarily result in denial of the award but will be considered in determining Contractor responsibility.

Notes: Providing false information may result in criminal prosecution or administrative sanctions. The above certification is part of the Proposal. Signing this Response on the signature portion thereof will also constitute the signature of this Certification.

|  |
|--|
| <p><b>BIDDER (COMPANY):</b> _____</p> <p><b>NAME/TITLE OF AUTHORIZED SIGNER:</b> _____</p> <p><b>SIGNATURE:</b>  _____ <b>DATE:</b> _____</p> |
|--|

## TABLE OF CONTENTS

**Instructions:** Bidder shall remove this page and replace it with a **Table of Contents** listing the individual sections of the proposal and their corresponding page numbers. The page(s) inserted shall be clearly marked *Table of Contents*.

## LETTER OF TRANSMITTAL

**Instructions:** Bidder shall remove this page and replace it with a **Letter of Transmittal**. The letter shall include a description of Bidder's capabilities and approach in providing its services to the County, and provide a brief synopsis of the highlights of its proposal and overall benefits to the County. The page(s) inserted shall be clearly marked *Letter of Transmittal*.

**Maximum Length:** 2 pages

## **BIDDER MINIMUM QUALIFICATIONS**

Bidder must respond and/or provide support documentation that fulfills all the minimum qualifications as identified in the RFP documents.

**Maximum Length: None**

## BUDGET DETAIL AND/OR COST NARRATIVE

**Instructions:** This page must be included as part of the Bid Response Packet. Following this page, Bidder shall provide a Budget Detail.

The *Budget Detail* must provide a breakdown of the cost(s) listed in the *BUDGET/BID FORM*. Bidders may use a budget template of their own choice; however, all costs attributed to the project under the awarded contract **MUST** be listed and described in the *Budget Detail*.

At a minimum, the Bidder must detail:

1. The work to be performed and all associated costs.
  - a. If coordination with County personnel is needed, it should also be described in the Budget Detail.
  - b. The work to be performed must clearly match up with work performed in the Description of Proposed Services (below).
2. The position and cost of individuals that will perform the services.
  - a. Names of Key Personnel may be listed whenever appropriate
  - b. The estimated number of hours for each individual/position, corresponding hourly rates, and extended costs.
3. Community engagement outreach efforts may involve amenities for participants (e.g., food, childcare, and other participation-related costs) and services (e.g., translation, interpretation, and transcription). A complete bid response will include line items that account for such expenditures.

**Maximum Length: None**

## TABLE OF KEY PERSONNEL

**Instructions:** This page must be included as part of the Bid Response Packet. Following this page, Bidder shall provide a **Table of Key Personnel**. The table shall include all key personnel associated with the RFP.

This table must include all key personnel who will provide services to the County, including collaborating partners. The table must include the following information for each key person:

1. The person's relationship with Bidder, including job title and years of employment with Bidder.
2. Work contact information includes, but is not limited to, the following: work address, office telephone number, mobile work number, and work email address.
3. The person's role in connection with the RFP and any awarded contract.
4. Educational background; and
5. Related experience on similar projects, certifications, and merits.

If a Bidder collaborates with any other partners or subcontractors, Bidder shall identify subcontractors, subcontractor qualifications, and how they plan to work together. Bidder(s) shall identify any existing agreements or MOUs between the Bidder(s) and proposed collaborator(s).

**Maximum Length:** There is no limit to the table. There is, however, a 2-page limit per résumé or curriculum vitae. Résumé and curriculum vitae are subject to public disclosure and business addresses should be used not home addresses.

## DESCRIPTION OF PROPOSED SERVICES

**Instructions:** This page must be included as part of the Bid Response Packet. Following this page, Bidder shall provide a **Description of Proposed Services**.

The *Description of Proposed Service* must describe the overall services. The Bidder must address how they will meet or exceed each requirement listed in Section E (Specific Requirements) and Section F (Deliverables/Reports).

At a minimum, the Bidder must include the following details:

1. Describe how Bidder will meet the program's desired overall goals, anticipated outcomes, measurable objectives, and critical tasks, including how key personnel will be responsible for achieving them.
2. Detail existing data collection infrastructure and demonstrate the ability to interface with County's database(s) as described in the RFP and/or provide reporting data to the County for maximum efficiency.
3. Explain any unique resources, procedures, or approaches that make the services of Bidder responsive to meeting the minimum qualifications and requirements of the RFP.
4. Identify any limitations or restrictions that exist for the Bidder to provide the services. Explain what measures will be taken to adequately provide the services. (Please note any requests for exceptions or clarifications MUST be identified on the [Exceptions and Clarifications](#) form. **The County is under no obligation to accept any exceptions or clarifications, and any such exceptions and clarifications may be a basis for bid disqualification.**)

**Maximum Length: None**

## IMPLEMENTATION PLAN AND SCHEDULE

**Instructions:** This page must be included as part of the Bid Response Packet. Following this page, Bidder shall provide an **Implementation Plan and Schedule**.

In conjunction with the *Description of Proposed Services* and the *Budget Detail*, the Bidder must include an *Implementation Plan and Schedule* that specifically addresses the following:

1. A timeline of project goals, measurable outcomes, and benchmark activities related to the provision of required services and the key personnel assigned to each.
2. The ideal Implementation Plan and Schedule will provide a clear picture of what the County can expect during the contract term and in preparing to start the contract. Bidders should consider the information and questions contained in the Evaluation Criteria and Specific Requirements in preparing the Implementation Plan and Schedule.

**Maximum Length: None**

## REFERENCES

**Instructions:** On the following pages are the templates that Bidders must use to provide references. Bidders are to provide a list of five references. References must be satisfactory as deemed solely by County. Services or goods provided by Bidder to the references should have similar scope, volume and requirements to those outlined in these specifications, terms and conditions.

Bidders must verify that the contact information for all references provided is current and valid. If a reference cannot be contacted it may affect the qualification and scoring of Bidders submission.

Bidders are strongly encouraged to notify all references that the County may be contacting them to obtain a reference.

The County may contact some or all of the references provided in order to determine Bidder's performance record on work similar to that described in this request. The County reserves the right to contact references other than those provided in the Response and to use the information gained from them in the evaluation process.

## REFERENCES

### TRANSIT-ORIENTED COMMUNITIES HOUSING INITIATIVE RFP

**Bidder Name:**

|   |                   |
|---|-------------------|
| Company Name:                           | Contact Person:   |
| Address:                                | Telephone Number: |
| City, State, Zip:                       | Email Address:    |
| Services Provided / Date(s) of Service: |                   |

|   |                   |
|---|-------------------|
| Company Name:                           | Contact Person:   |
| Address:                                | Telephone Number: |
| City, State, Zip:                       | Email Address:    |
| Services Provided / Date(s) of Service: |                   |

|   |                   |
|---|-------------------|
| Company Name:                           | Contact Person:   |
| Address:                                | Telephone Number: |
| City, State, Zip:                       | Email Address:    |
| Services Provided / Date(s) of Service: |                   |

|   |                   |
|---|-------------------|
| Company Name:                           | Contact Person:   |
| Address:                                | Telephone Number: |
| City, State, Zip:                       | Email Address:    |
| Services Provided / Date(s) of Service: |                   |

|   |                   |
|---|-------------------|
| Company Name:                           | Contact Person:   |
| Address:                                | Telephone Number: |
| City, State, Zip:                       | Email Address:    |
| Services Provided / Date(s) of Service: |                   |

\*Use additional pages as necessary

## EXCEPTIONS AND CLARIFICATIONS

**Instructions:** Bidders must use the **Exceptions and Clarifications** form to identify and list below any and all exceptions and/or clarifications to the RFP and associated Bid Documents and submit them with the bid proposal.

**THE COUNTY IS UNDER NO OBLIGATION TO ACCEPT ANY EXCEPTIONS AND CLARIFICATIONS; ANY SUCH EXCEPTIONS AND CLARIFICATIONS MAY BE A BASIS FOR BID PROPOSAL DISQUALIFICATION.**

| Reference to: |         |          | Description                         |
|---------------|---------|----------|-------------------------------------|
| Page No.      | Section | Item No. |                                     |
| p. 23         | D       | 1.c.     | <i>Bidder takes exception to...</i> |
|               |         |          |                                     |
|               |         |          |                                     |
|               |         |          |                                     |
|               |         |          |                                     |
|               |         |          |                                     |
|               |         |          |                                     |
|               |         |          |                                     |
|               |         |          |                                     |
|               |         |          |                                     |
|               |         |          |                                     |
|               |         |          |                                     |
|               |         |          |                                     |

\*Use additional pages as necessary

## SLEB INFORMATION SHEET

**Instructions:** On the following page is the *SLEB Information Sheet*. Every Bidder must fill out and submit a signed SLEB Information Sheet, indicating their SLEB certification status. If Bidder is not certified, the information sheet must be completed with the name, identification information, and goods/services to be provided by the CERTIFIED SLEB partner(s) with whom the Bidder will subcontract to meet the County SLEB participation requirement. The Exhibit must be signed by EACH of the named CERTIFIED SLEB(s) that will be subcontractors.

SLEB certification must be complete at the time of bid submittal for SLEB primes and SLEB subcontractor(s).

- For SLEB Subcontracting Questions: Please contact the General Services Agency-Office of Acquisition Policy - Ratha Chuon, [ratha.chuon@acgov.org](mailto:ratha.chuon@acgov.org), (510) 208-9617.
- For questions/information regarding SLEB certification including requirements, please contact the Auditor-Controller Agency, Office of Contract Compliance & Reporting – SLEB Certification Unit at (510) 891-5500.

**SMALL LOCAL EMERGING BUSINESS (SLEB)  
INFORMATION SHEET**

**Transit-Oriented Communities Housing Initiative RFP**

In order to meet the Small Local Emerging Business (SLEB) requirements of this RFP, all Bidders must complete this form.

Bidders that are not certified SLEBS (for definition of a SLEB see <http://acgov.org/auditor/sleb/overview.htm>) are required to subcontract with a SLEB for at least 20% of the total estimated bid amount in order to be eligible for contract award. SLEB subcontractors must be independently owned and operated from the prime Contractor with no employees of either entity working for the other. A copy of this form must be submitted for each SLEB that the Bidder will subcontract with, as evidence of a firm contractual commitment to meeting the SLEB participation requirement.


Bidders are encouraged to form a partnership with a SLEB that can participate directly with this contract. One of the benefits of the partnership will be economic, but this partnership will also assist the SLEB to grow and build capacity to eventually bid as a prime on their own.

Once a contract has been awarded, substitutions of the named subcontractor(s) are not allowed without prior written approval from the Auditor-Controller, Office of Contract Compliance & Reporting (OCCR).

County departments, prime and subcontractors are required to use the web-based Elation Systems to monitor SLEB subcontractor compliance with Elation Systems: <http://www.elationsys.com/elationsys/>.

|  |
|--|
| <input type="checkbox"/> <b>BIDDER IS A CERTIFIED SLEB</b> (sign at bottom of page)<br>SLEB BIDDER Business Name: _____<br>SLEB Certification #: _____ SLEB Certification Expiration Date: _____<br>NAICS Codes Included in Certification: _____ |
|--|

**OR**

|   |
|---|
| <input type="checkbox"/> <b>BIDDER IS <u>NOT</u> A CERTIFIED SLEB AND WILL SUBCONTRACT ___% WITH THE SLEB NAMED BELOW FOR THE FOLLOWING GOODS/SERVICES:</b> _____<br>SLEB Subcontractor Business Name: _____<br>SLEB Certification #: _____ SLEB Certification Expiration Date: _____<br>SLEB Certification Status: <input type="checkbox"/> Small / <input type="checkbox"/> Emerging<br>NAICS Codes Included in Certification: _____<br>SLEB Subcontractor Principal Name: _____<br>SLEB Subcontractor Principal Signature:  _____ Date: _____ |
|---|

**Upon award, Bidder (the prime Contractor) and all SLEB subcontractors** agree to register and use the secure web-based ELATION SYSTEMS. ELATION SYSTEMS will be used to submit SLEB subcontractor participation including, but not limited to, subcontractor contract amounts, payments made, and confirmation of payments received.

Bidder Printed Name/Title: \_\_\_\_\_

Street Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

**Bidder Signature:**  \_\_\_\_\_ **Date:** \_\_\_\_\_

## **CREDENTIALS**

**Instructions:** This page must be included as part of the Bid Response Packet. Following this page, Bidders are to provide proof of any permits, licenses, and/or professional credentials necessary to supply product and perform services as specified in this RFP.

# EXHIBIT B

## EXCERPTS FROM MTC ADMINISTRATIVE GUIDANCE: TRANSIT-ORIENTED COMMUNITIES POLICY (NOVEMBER 2024)

*The following information is excerpted from the Metropolitan Transportation Commission's Administrative Guidance: Transit-Oriented Communities Policy, finalized in November 2024. For the complete guidance, see here: <https://mtc.ca.gov/digital-library/5023804-mtc-administrative-guidance-transit-oriented-communities-policy>*

*Excerpted from I. Background and Purpose, page 3*

Four goals guide the TOC Policy and advance PBA 2050 implementation:

- Increase the overall housing supply in part by increasing the density for new residential projects. Prioritize affordable housing in transit-rich areas.
- In areas near regional transit hubs, increase density for new commercial office development.
- Prioritize bus transit, active transportation, and shared mobility within and to/from transit-rich areas, particularly to Equity Priority Communities located more than ½ mile from transit stops or stations.
- Support and build partnerships to create equitable transit-oriented communities within the San Francisco Bay Area.

*Excerpted from Section 2 Affordable Housing Production, Preservation, and Protection Policies and Commercial Stabilization Policies, page 25*

### Geography for Policy Applicability

At minimum, policies must apply in all TOC areas. Jurisdictions may choose to apply policies beyond the TOC area(s), which could include the entirety of the jurisdiction (i.e., adopting a jurisdiction-wide policy). Some policies detailed in Appendix A have additional, policy-specific geographic applicability considerations

*Selected excerpts from Appendix A, pages 2-3 and 11-13*

### **Production Policy 1: Inclusionary Zoning**

*Description from TOC Policy Resolution: Requires that 15% of units in new residential development projects above a certain number of units be deed-restricted affordable to low-income1 households. A lower percentage may be adopted if it can be demonstrated by a satisfactory financial feasibility analysis that a 15% requirement is not feasible.*

#### *Purpose*

Inclusionary zoning requires new residential construction projects to contribute to a jurisdiction's affordable housing stock. Inclusionary zoning can enable jurisdictions to leverage private dollars for affordable housing, bringing affordable units online faster and in greater numbers than relying exclusively on public funding streams. Inclusionary zoning also helps ensure new affordable housing units are developed in the same neighborhoods as new market-rate development, furthering the goal of economic integration.

Typically, a city or county will adopt an inclusionary zoning policy to both add more affordable homes to its inventory and ensure lower-income households can live in high opportunity neighborhoods where they would otherwise be priced out. Inclusionary zoning can be a method to address historic patterns of exclusion and segregation by ensuring housing is available for lower-wage workers, guarding against concentrations of poverty and affluence, and making it possible for lower-income households to live in higher-resource neighborhoods. An effective inclusionary zoning policy will establish affordability requirements and standards for affordable units, as well as provide incentives and compliance alternatives for developers.

#### *Requirements for TOC Policy Compliance*

To comply with the TOC Policy, a jurisdiction's inclusionary zoning policy must meet the following minimum requirements:

- The policy must apply to newly constructed residential or mixed-use residential projects. The policy must apply to ownership and rental units.
- The policy may exempt properties with fewer than 11 units, student housing, 100% affordable housing, senior housing, or other special housing types.
- The policy must require at least 15% of units be deed-restricted affordable housing units.
- For rental units, the policy's affordability requirements must require the income mix of affordable units to average out to 80% of AMI or less, with no affordable rental units available to households above 120% of AMI. For ownership units, the policy's affordability requirements must require the income mix of affordable units to average out to 120% of AMI or less, with no affordable ownership units available to households above 150% of AMI. Jurisdictions should require deeper levels of affordability where feasible or through offering additional incentives.
- The policy may require less than 15% affordable units if:
  - The jurisdiction provides an analysis showing that an alternative requirement is economically equivalent to the 15% standard (for example, a policy that required

fewer units at a deeper affordability level, such as 10% of units affordable to households earning less than 50% of AMI). OR

- A financial feasibility analysis (completed within 24 months of the date that inclusionary zoning policy was adopted) found that a 15% requirement was not feasible.
- The policy may require more than 15% affordable units. *State Law (AB 1550) allows HCD to request a feasibility study for requirements greater than 15%, but does not require that such a feasibility study be completed prior to adoption of the ordinance.*
- Affordable units must have recorded documents that set binding maximum rent or price restrictions to ensure affordability. These requirements must restrict rents and sales prices to affordable levels as defined by the rules of any applicable state or federal affordable housing program. These restrictions must also ensure affordability for at least 55 years for rental housing or at least 45 years for ownership housing.
- Per state law, inclusionary zoning must allow for alternative means of compliance (e.g., paying in-lieu fees to support affordable housing development, building affordable units off-site, or dedicating land for the construction of affordable housing). For compliance with the TOC Policy, a jurisdiction with an in-lieu fee that typically results in a payment of less than \$100,000 per affordable unit, must provide a justification for why the fee will result in at least as many restricted affordable housing units as would be required of a project providing onsite units.

### **Production Policy 5: Ministerial Approval**

*Description from TOC Policy Resolution: Grant ministerial approval of residential developments that include, at a minimum, 15% affordable units if projects have 11 or more units, or that exceed inclusionary or density bonus affordability requirements and do not exceed 0.5 parking spaces per unit.*

#### *Purpose*

“Ministerial approval” means a process for development approval involving little or no subjective judgment by a public official or commission. A public agency or commission merely ensures the proposed development meets all the objective zoning standards, objective subdivision standards, and objective design review standards in effect at the time the application is submitted to the local government. Developments under ministerial approval are exempt from the California Environmental Quality Act (CEQA), which eliminates the costs and time for environmental review.<sup>8</sup> An effective ministerial approval policy will significantly reduce the turnaround time of housing projects by expediting the approval process, reduce development risk by providing more certainty in the approval process, and thereby lead to faster construction of housing with decreased carrying costs.

#### *Requirements for TOC Policy Compliance*

To comply with the TOC Policy, a jurisdiction's ministerial approval policy must meet the following minimum requirements:

- For projects with 11 or more units, the policy must do ONE of the following:
  - Grant ministerial approval to any project where at least 15% of units are deed-restricted affordable housing units. OR
  - Grant ministerial approval for projects whose share of affordable units exceeds any existing local inclusionary zoning requirements and provides more affordable housing units or deeper affordability than would be required under state density bonus rules (given the bonus density obtained by the project).
- The policy's affordability requirements must define affordable units as rental housing available to lower-income households earning 80% of AMI or less, and ownership housing to lower- and moderate-income households earning 120% of AMI or less. Jurisdictions should require deeper levels of affordability where feasible or through offering additional incentives.
- Affordable units must have recorded documents that set binding maximum rent or price restrictions to ensure affordability. These requirements must restrict rents and sales prices to affordable levels as defined by the rules of any applicable state or federal affordable housing program. These restrictions must also ensure affordability for at least 55 years for rental housing and at least 45 years for ownership housing.
- At minimum, jurisdictions must provide ministerial approval to projects with 11 or more units meeting the affordability standards described above. This does not preclude jurisdictions from applying ministerial approval to a broader range of projects, such as all multifamily housing regardless of affordability.
- Projects eligible for ministerial review cannot include more parking than is allowed by the parking space requirements outlined in Table 12 of MTC's TOC Policy Administrative Guidance.

# EXHIBIT C

## COUNTY OF ALAMEDA MINIMUM INSURANCE REQUIREMENTS

Minimum Insurance Requirements can also be viewed here:

[https://acgov.org/cao/rmu/documents/STD\\_Exh\\_C1\\_Standard.pdf](https://acgov.org/cao/rmu/documents/STD_Exh_C1_Standard.pdf)

Without limiting any other obligation or liability under this Agreement, the Contractor, at its sole cost and expense, shall secure and keep in force during the entire term of the Agreement or longer, as may be specified below, the following minimum insurance coverage, limits and endorsements. The County reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances. If the contractor maintains broader coverage and/or higher limits than the minimums shown below, the County requires and shall be entitled to the broader coverage and/or the higher limits maintained by the Contractor. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the County.

| TYPE OF INSURANCE COVERAGES |   | MINIMUM LIMITS   |
|-----------------------------|---|--|
| <b>A</b>                    | <b>Commercial General Liability</b><br>Premises Liability; Products and Completed Operations; Contractual Liability; Personal Injury and Advertising Liability  | \$1,000,000 per occurrence (CSL)<br>Bodily Injury and Property Damage  |
| <b>B</b>                    | <b>Commercial or Business Automobile Liability</b><br>All owned vehicles, hired or leased vehicles, non-owned, borrowed and permissive uses. Personal Automobile Liability when extended to cover your business is acceptable for individual contractors with no transportation or hauling related activities | \$1,000,000 per occurrence (CSL)<br>Any Auto or Hired and Non-Owned Autos<br>Bodily Injury and Property Damage |
| <b>C</b>                    | <b>Workers' Compensation (WC) and Employers Liability (EL)</b><br>As required by State of California  | WC: Statutory Limits<br>EL: No less than \$1,000,000 per accident for bodily injury or disease                 |