

ST. JOSEPH COUNTY HOUSING CONSORTIUM REQUEST FOR PROPOSAL (RFP) FOR PROFESSIONAL SERVICES

**PY 2025 – 2029 HOUSING AND COMMUNITY DEVELOPMENT
CONSOLIDATED PLAN,
2025 ACTION PLANS,
AND
PY 2025 – 2029 ANALYSIS OF IMPEDIMENTS TO FAIR HOUSING
CHOICE**

**City of South Bend, Indiana
City of Mishawaka, Indiana
St. Joseph County, Indiana**



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CONSOLIDATED PLAN,
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Please respond to both Part I and Part II. Each Part requires a separate narrative, proposed budget, and comprehensive plan for implementation:

PART I: PY2025-2029 HOUSING AND COMMUNITY DEVELOPMENT CONSOLIDATED PLAN

PART II: PY2025-2029 ANALYSIS OF IMPEDIMENTS TO FAIR HOUSING CHOICE

Introduction

The St. Joseph County Housing Consortium (“Consortium”) is soliciting proposals from qualified professional consultants to provide planning services, technical advice, and assistance to conduct the preparation and submission of the Five-Year Strategic Housing and Community Development (“HCD”) Consolidated Plan (“Con Plan”) required by the U.S. Department of Housing and Urban Development (“HUD”) pursuant to its HOME Investment Partnerships Program (“HOME”), the City of South Bend’s Community Development Block Grant Program (“CDBG”) and Emergency Solutions Grant Program (“ESG”), and the City of Mishawaka’s CDBG Program. In addition, all proposals shall include a narrative, budget, and plan for the preparation of an Analysis of Impediments to Fair Housing Choice (“AI”).

The Con Plan and AI will cover the three Consortium jurisdictions: the City of South Bend, the City of Mishawaka, and the unincorporated areas of St. Joseph County. The Con Plan will cover the combined HOME entitlement grant for these three jurisdictions, the CDBG entitlement grants for the Cities of South Bend and Mishawaka, and the ESG entitlement grant for the City of South Bend.

The St. Joseph County Housing Consortium receives approximately \$1,000,000 in HOME funds annually. The City of South Bend is the lead agency for the Consortium. With a population of 103,000 residents, South Bend is an entitlement community that receives approximately \$2,300,000 in CDBG and \$210,000 in ESG allocations annually. The City of Mishawaka has a population of 51,000 residents and is a CDBG entitlement community, receiving approximately \$450,000 annually. The total population of St. Joseph county, including South Bend and Mishawaka, is 272,000.

Specific federal requirements for the Con Plan can be found at 24 CFR Part 91. The Con Plan is required to be completed via HUD’s e-Con Planning Suite and pursuant to any new guidance or direction as it becomes available. The AI shall be conducted in accordance with the necessary requirements and guidelines under the Federal regulations.

Proposal Submission Deadline, Requirements, and Process

This Request for Proposals (“RFP”) is soliciting proposals from qualified professional consultants. Proposals must comply with all federal, state, and municipal laws, ordinances, and regulations. Any contract resulting from the RFP will be governed by and construed in accordance with the laws of the State of Indiana.

Registering as an interested party

Should it be necessary to revise any part of this RFP, provide additional information necessary to adequately interpret provisions and requirements of this RFP, or respond to written inquiries concerning the RFP, the City, at its sole discretion, reserves the right to issue an addendum to the RFP. Any and all addenda or information regarding this RFP will be sent **ONLY** to Proposers that have properly registered as an interested party. To register, the Proposer must email Neighborhood Grants at federalgrants@southbendin.gov. The email subject line should state “**SJCHC HCD Con Plan Interested Party**” and the email should provide the **name and contact information for a point of contact**. ***By failing to properly register, the Proposer risks the proposal being deemed non-responsive and not being awarded.*** The City is not responsible, in any manner, for the completeness and responsiveness of a proposal.

Inquiries

Inquiries regarding any aspect of this RFP should be e-mailed to the City’s Department of Community Investment c/o Neighborhood Grants at federalgrants@southbendin.gov. Please reference “**SJCHC HCD Con Plan - Questions**” in the subject line. Telephone calls or other methods of communication will not be accepted. All inquiries must be submitted by 5:00 pm EST on January 26, 2024. Inquiries received after this time will not be addressed.

Submission Requirements

Proposals must be received by 4 p.m. (EST) on February 9, 2024, at which time all proposals will be opened. Incomplete or proposals received later than this date and time will be deemed unresponsive and will not be considered. The Consortium reserves the right to accept or reject any and all proposals, to waive irregularities and technicalities, and to request corrected resubmissions.

Proposals may be submitted by any of the following methods:

In Person:

The **original and one (1) copy** of each proposal (Con Plan and Analysis of Impediments) and attachments may be dropped off to the City of South Bend Neighborhoods Office located on the 13th floor of the County-City Building (take a left off the elevator) in Downtown South Bend (227 W. Jefferson Blvd., 1300S, South Bend, Indiana, 46601). The proposals should be in a sealed envelope labeled “RFP: St. Joseph County Housing Consortium HCD Con Plan” and addressed to City of South Bend Department of Community Investment c/o Neighborhood Grants.

By Mail:

The **original and one (1) copy** of each proposal (Con Plan and Analysis of Impediments) and attachments may be mailed to:
City of South Bend Department of Community Investment

c/o Neighborhood Grants
227 W. Jefferson Blvd., Suite 1300S
South Bend, IN 46601

The proposals should be in sealed envelope that clearly states, "RFP: St. Joseph County Housing Consortium HCD Con Plan." Mail / FedEx / UPS delivery times vary, so the Proposer is responsible for ensuring the proposal reaches the office prior to the deadline at 4:00 p.m. on Friday, February 9, 2024.

Via Email:

A .pdf copy of each proposal (Con Plan and Analysis of Impediments) and attachments may be emailed to the City of South Bend Department of Community Investment c/o Neighborhood Grants at federalgrants@southbendin.gov. The subject line of the email should read "**RFP: St. Joseph County Housing Consortium HCD Con Plan RFP**". Depending on the size of the documents you may choose to send the information in more than one email. If sending more than one email, please clearly mark each to reflect the order (i.e. 1 of 3, etc.) All emails / portions of the proposal must arrive prior to the deadline. Links to dropboxes or online drives will not be accepted.

NO FAX WILL BE ACCEPTED.

No matter the method of submission, all proposals must be submitted using the legal name of the organization with whom a contract would be executed and must be signed by an authorized representative. Submissions must include all of the information outlined in each of the Scopes of Services. Nonprofit applicants must include a copy of its tax-exempt nonprofit status under Section 501 (c)(3) of the Internal Revenue Code.

Only submit materials that have been requested. For proposals submitted in person or by mail, no bindings or special coverings are desired.

PLEASE NOTE: Proposals that are incomplete, request activities other than outlined in this document, have an inadequate number of copies, lack required attachments, or proposals submitted after the published deadline will not be considered for funding. Changes and/or additions to the proposal after the submission will not be accepted unless specifically requested by the City.

PART I: PY2025-2029 HOUSING AND COMMUNITY DEVELOPMENT CONSOLIDATED PLAN

Scope of Services – 5-Year Consolidated Plan

Services shall include the following:

1. General Organizational Plan
 - a. Meet with Consortium, South Bend, and Mishawaka staff to develop a work plan.
 - b. A timeline for realistic project milestones. In all cases, final deliverables will be due on September 3, 2024
2. Citizen Participation Plan
 - a. Create a citizen participation process and describe how or by what means necessary tasks will be accomplished. Include a minimum of four (4) Consortium jurisdiction-wide hearings, as well as two (2) municipal hearings in South Bend and Mishawaka to solicit input for the Con Plan and comments on the first draft.
 - b. To minimize costs, in certain circumstances the Consortium may decide that it is possible that meetings and outreach be conducted by Consortium and/or municipal staff. In such cases, if they occur, the consultant shall be responsible to create a plan for soliciting adequate input from stakeholders.
3. Needs Assessment
 - a. Create a plan for obtaining input from a wide variety of stakeholders and data sources. There shall be a Housing Needs Assessment for CDBG and HOME funding purposes, and a Non-Housing Needs Assessment for the CDBG entitlement communities' Con Plans. At a minimum, the following should be addressed:
 - i. All relevant federal and municipal data, reports, and documents;
 - ii. HUD Con Plan regulations and guidance;
 - iii. Interviews and focus group meetings with pre-determined community stakeholders.
 - b. Prepare a summary of comments and data and conduct an analysis to support five-year priority recommendations.
 - c. The Housing Needs Assessment shall cover the nature and extent of homelessness in terms of facilities and services across the St. Joseph County – Region 2a CoC Homeless Regional Planning Council service area. Analyze needs by sub-populations, ethnicities, and at-risk groups.
 - d. The Housing Needs Assessment shall cover local housing needs for sub-groups such as supportive elderly housing, disability housing, housing for people with HIV/AIDS, and public housing.
 - e. The Non-Housing Needs Assessment shall cover local needs for Public Services, Public Facilities, and Economic Development within the South Bend and Mishawaka entitlement communities.
 - f. Complete all related tables and data sheets as per HUD's eCon Planning Suite.
 - g. Prepare needs assessment in eCon Planning Suite and in legible hardcopy format.

4. Housing Market Analysis
 - a. Prepare a Housing Market Analysis, which will, at a minimum:
 - i. Include all relevant maps and tables showing income, existing housing, and ethnic characteristics data;
 - ii. Identify and describe housing characteristics including supply/demand, current housing costs, and current conditions;
 - iii. Provide an inventory of emergency and transitional housing and services, as well as a discussion of how these related to needs;
 - iv. Provide an inventory of supportive housing facilities and services and identify barriers to the provision of additional facilities and services. Populations addressed should include the elderly, disabled, those afflicted with HIV/AIDS, substance abuse sufferers, victims of domestic violence, youth homeless, and public housing residents.
5. Preparation of the PY 2025-2029 Five-Year Con Plan and 2025 One Year Action Plans for the Consortium, the City of South Bend (one combined plan) and the City of Mishawaka (one plan). The consultant will do the following for each of these entities:
 - a. Develop a draft Con Plan using the eCon Planning Suite that includes five-year funding goals, priorities and strategies, and proposed accomplishments and performance measurements.
 - b. Develop draft PY 2025 Annual Action Plans that includes proposed activities, proposed accomplishments and performance measurements using IDIS and the eCon Planning Suite.
 - c. Provide copies to relevant Consortium and municipal staff for review and comment before the public drafts are finalized.
 - d. Prepare final drafts of both the Con Plan and the Annual Action Plans, incorporating public input on the drafts.
 - e. Complete the draft Con Plan and draft Annual Action Plans in the eCon Planning Suite and provide a legible electronic format for public review.
 - f. Prepare documents for submission via the eCon Planning Suite, including all relevant maps, tables, charts, illustrations, and photos.
6. Follow a pre-determined schedule to align with the Consortium's 2025 Annual Action Plan process:
 - a. April 2024: Municipal hearings in South Bend and Mishawaka.
 - b. May-June 2024: No less than (4) public meetings with stakeholders
 - c. July 2024: Deliver input and public comments received on HCD Plan
7. The consultant will be responsible for all troubleshooting with HUD with respect to submitting information via the eCon Planning Suite.
8. Regular meetings, in person or via TEAMS, with Consortium staff.

PART II: PY2025-2029 ANALYSIS OF IMPEDIMENTS TO FAIR HOUSING CHOICE

Scope of Services – Analysis of Impediments to Fair Housing Choice

Services shall include the following:

1. Examine pertinent data including demographic, income, employment and housing data, as well as studies that relate to fair housing.
2. Review State and local jurisdiction's laws and regulations. Assess how those laws and regulations affect the location, availability and accessibility of housing.
3. Assess local agencies currently providing fair housing programs in the area.
4. Conduct interviews and focus group meetings with predetermined community stakeholders.
5. Evaluate conditions, both public and private, affecting fair housing choice for all protected classes.
6. Identify any impediments to fair housing in both the private and public sector due to race, color, religion, sex, gender identity, sexual orientation, disability, ancestry, familial status or national origin which restrict or have the effect of restricting housing choices or availability of housing choices listed in order of priority.
7. Draw conclusions and make recommendations for action, including recommended actions to overcome identified impediments to fair housing choice. Identify milestones, timetables and measurable results.
8. Regular meetings, in person or via TEAMS, with Consortium staff.

Submission Requirements

Proposals must submit information in sufficient detail to enable the Consortium to give consideration to the proposal.

All proposals must be submitted using the legal name of the organization with whom a contract would be executed and must be signed by an authorized representative.

A successful proposal must demonstrate the experience and capacity of the Proposer to complete the project. Proposals should clearly show the Proposer has experienced staff who can facilitate the completion of the project. It should also confirm the capacity of the Proposer to complete the project as described and within the outlined schedule.

The proposal must include:

1. Cover Letter signed by an officer of the firm. Include information of a primary contact person. Qualifications and experience of the firm and any staff that will be involved in the performance of the contract.
2. Nonprofit applicants must provide a copy of its tax-exempt nonprofit status under Section 501(c)(3) of the Internal Revenue Code.
3. Proposals should detail the qualifications, skills, background, and relevant experience of the organization. In addition, it should highlight any aspects in which the Proposer's qualifications are believed to be exceptional or unique. Proposals should include a description of the organization's experience with HCD Consolidated Plans and Analyses of Impediments to Fair Housing Choice. This should include identifying all persons that will be actively engaged on this project and their roles. Detail the qualifications, skills, background, and relevant experience of key staff (do not include resumes).

Proposals should share comparable projects completed, or in process, by the Proposer during the most recent five-year period. The project(s) should be similar in scope to the Proposer's proposed project. Comparable projects should demonstrate the Proposer's understanding of the RFP's intent and goals.

4. Description of the approach to the scope of work. Proposals should provide a clear description of the proposed project. It should provide enough detail to show that the project is well thought out, achievable, and within the capacity of the Proposer. At a minimum, the project scope should include:
 - a. methods for collecting, analyzing, and presenting data;
 - b. an approach for community engagement;
 - c. ideas for cost engineering to maximize the quality and effectiveness of work while limiting the contract price; and
 - d. a demonstrated understanding of IDIS and the eCon Planning Suite
5. Proposal for how the work may be allocated among the participating jurisdictions.

6. Timeline of when tasks would be realistically completed. Indicate who will complete the tasks, recognizing that the draft Con Plan and Action Plans must be delivered to the Consortium by September 3, 2024. Provide a start-to-finish timeline for the implementation of the project, including outlining timeframes for completion of major milestones. The schedule should clearly explain project readiness and demonstrate how the Proposer intends to complete the work within a realistic timeline.
7. List of resources expected from the jurisdictions that are necessary to complete the tasks specified in the RFP. This includes data, staff time, or other resources.
8. Contact information for references for work on similar contracts. Provide letters from, or contact information for, up to three references who can verify the capability of the Proposer to complete the proposed project. The proposal should include a brief description of the role of, and work completed by, the Proposer relative to each reference. *Please limit to one page.*
9. Total cost of services, not-to-exceed fixed fee cost.
10. Detailed breakdown of costs, i.e. hours, travel, etc. Provide an estimate for each task described in the Scope of Work and listed on the firm's proposed schedule.

Timetable

The proposed project, as well as the proposed organization's capacity to administer the project, will be reviewed and evaluated. Proposals may not receive funding if an organization cannot meet the requirements of RFP and/or demonstrate organizational capacity. Proposals will be evaluated using the Proposal Evaluation Scoring Matrix. Incomplete proposals will not be evaluated.

The City reserves the right to request additional information from any or all proposers as necessary to clarify that which is contained in the proposals. As part of the review process, representatives from proposing organizations may be asked to meet with City staff to discuss their proposals. If interviews are requested, City staff will notify the proposer(s) of the time and location of the interview once all proposals are received and processed. Further, the City reserves the right to negotiate with a proposer on the terms of its proposal. The City also reserves the right to reject all proposals or to accept proposals in part.

The approximate timeline for selection and contract execution is as follows:

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|-------------------------|--|
| January 8, 2024: | Request for Proposals advertised and sent to interested parties |
| January 26, 2024: | Inquiry deadline |
| February 9, 2024: | Proposals due to the St. Joseph County Housing Consortium |
| February 21, 2024*: | Proposal Review & Shortlist Completed |
| Week of March 4, 2023*: | Proposer Interviews and/or Requests for Additional Information (as needed) |

Week of March 18, 2024*: Proposer Selected
September 3, 2024: Completed draft 5-year Con Plan, draft 2025 Action Plans, and
Final Analysis of Impediments due to Consortium

*These are anticipated dates and subject to change based on several factors such as number of proposals, amount of additional information required, etc.

The Consortium reserves the right to request interviews with the proposing firms before awarding a contract.

The St. Joseph County Housing Consortium does not discriminate on the basis of race, color, national origin, ancestry, religion, sex, sexual orientation, gender identity, disability, or familial status, and is an Equal Opportunity Employer.

Evaluation Criteria

Proposals will be evaluated using the below Proposal Evaluation Scoring Matrix. Incomplete proposals will not be evaluated. **The City may award the professional services agreement outside this criterion at its discretion:**

| Criteria | Description |
|---|---|
| Organizational Structure, and Financial & Reporting Capacity | <p>Lead organization has required organizational structure and financial & reporting capacity needed to successfully complete the project.</p> <p>Organization has unique or exceptional qualities / qualifications that make it ideal as a partner. Past management and key staff qualifications and background that supports the organizations' ability to complete the project as proposed.</p> <p><u>Organizations without required structure or capacity are ineligible.</u></p> <p><u>Considerations:</u></p> <p><i>Advantageous:</i> Successful, on-time, within budget completion of multiple Con Plans, outreach activities, and other CDBG-oriented projects. Experience with HUD's eCon Planning Suite.</p> <p><i>Acceptable:</i> Successful completion of at least one Con Plan, outreach activities, and multiple similar community planning projects. Experience with HUD's eCon Planning Suite.</p> <p><i>Unacceptable:</i> No experience implementing planning processes. No experience using HUD's eCon Planning Suite.</p> |
| Experience and Proficiency | <p>Lead organization & Project Manager has sufficient experience in projects of similar type, size, and complexity and has successfully implemented past projects.</p> <p><u>Organizations without required experience are ineligible.</u></p> <p><u>Considerations:</u></p> <p><i>Advantageous:</i> Ten (10) or more years of experience with the HCD 5-Year Con Plan Process and outreach activities, and in conducting housing market analyses or needs assessments.</p> <p><i>Acceptable:</i> One to nine (1-9) years of experience with the HCD 5-Year Con Plan Process and outreach activities, and in conducting housing market analyses or needs assessments.</p> <p><i>Unacceptable:</i> No experience creating plans of similar scope to the HCD 5-Year Con Plan and Analysis of Impediments to Fair Housing Choice.</p> |

| | |
|---|---|
| Project Scope | <p>Proposal demonstrates an exceptional understanding of the City intent for project(s). Proposal is consistent with RFP goals. Desirability of the proposed project compared to other submissions and/or envisioned outcomes.</p> <p>Considerations: <i>Advantageous:</i> Includes a detailed plan for addressing all the required issues that maximizes value while minimizing costs. Clear and reasonable timeline for completeness.</p> <p><i>Acceptable:</i> Includes a credible plan for addressing all the required issues in a timely fashion. Timeline for completeness is reasonable.</p> <p><i>Unacceptable:</i> The plan is incomplete or non-existent.</p> |
| Project Budget | <p>Demonstrates stewardship of funding including amount of funding request relative to total budget and organization has the financial capacity to complete the project as proposed.</p> <p>Considerations: <i>Advantageous:</i> Includes a detailed budget which maximizes value while minimizing costs.</p> <p><i>Acceptable:</i> Includes a reasonable budget for addressing all the required issues in a timely fashion.</p> <p><i>Unacceptable:</i> A budget or is incomplete or non-existent.</p> |
| Timeliness & Project Readiness | <p>Well thought out proposal that provides detailed implementation strategy of how project deadlines will be met. Illustrates capacity to maintain the desired schedule.</p> <p>Considerations: <i>Advantageous:</i> Includes a detailed timeline identifying key checkpoints. Clear and reasonable timeline for completeness.</p> <p><i>Acceptable:</i> Includes a credible plan for addressing all the required issues in a timely fashion. Timeline for completeness is reasonable.</p> <p><i>Unacceptable:</i> A timeline or is incomplete or non-existent.</p> |

Available Resources

Existing Neighborhood Plans and Community Studies & Reports

<https://www.southbendin.gov/departments/community-investment/planning-community-resources/plans/>

Housing South Bend – Kinder Institute for Urban Research Report (2022)

<https://southbendin.gov/wp-content/uploads/2022/10/KI-Research-ReportHousing-South-Bend-FINAL.pdf>

Analysis of Residential Market Potential Reports –2021

<https://www.southbendin.gov/departments/community-investment/planning-community-resources/studies/>

Analysis of Impediments to Fair Housing Choice

<https://southbendin.gov/wp-content/uploads/2018/07/FINAL-2020-2024-Analysis-of-Impediments-to-Fair-Housing-Choice.pdf>

Housing and Community Development Plan (2020-2024)

<https://southbendin.gov/wp-content/uploads/2018/07/FINAL-2020-2024-Housing-and-Community-Development-Plan.pdf>

South Bend Zoning Ordinance

www.southbendin.gov/zoning

City of Mishawaka Housing and Community Development Plan (2020-2024)

<https://mishawaka.in.gov/wp-content/uploads/2022/11/2020-2024-consolidated-plan.pdf>

City of Mishawaka Ordinance

https://library.municode.com/in/mishawaka/codes/code_of_ordinances?nodeId=PTIILADECO_CH137ZO

St. Joseph County Infrastructure, Planning & Growth

<https://www.sjcindiana.com/2250/Infrastructure-Planning-Growth>