

Request for Proposals

FOR

PUBLIC SERVICES, HOUSING REHABILITATION, PUBLIC FACILITIES AND IMPROVEMENTS

FISCAL YEAR 2009-10



Date Issued

November 4, 2008

Deadline for Submission

3:00 P.M. November 25, 2008

Table of Contents

Section 1		Introduction
	1.1 1.2 1.3 1.4 1.5 1.6 1.7	Introduction 2 Urban County Background 2 Funding Levels 3 RFP Timetable 3 Eligible Activities 3 Eligible Applicants 3 Funding Allocation Process 4 Urban County Priorities 6
Section 2		Proposal Submission Requirements
	2.1 2.2 2.3 2.4 2.5	Deadline for Submission 10 Applicant's Questions 10 Bidder's Conference 10 Proposal Submission 10 Preparation of the Proposal 10
Section 3		Technical Eligibility/Review and Evaluation Criteria
	3.1 3.2 3.3 3.4	Advisory
Section 4		Appeal Process
	4.1	Appeals14
Attachment Attachment Attachment	B – Income C – Terms a	ion of Funds
APPLICAT Activity 1.	a. Pro b. Fur c. Pro	TIES Rehabilitation ject /Organizational Readiness Inding Request and Accomplishment Budget ject Cost Budget Drity Needs
Activity 2.	a. Pro b. Fur c. Pro d. Pric	facilities and Improvements ject/Organizational Readiness Inding Request and Accomplishment Budget ject Cost Budget Ority Needs Jible Block Groups
Activity 3.	b. Fur c. Prid d. Tar e. Pro f. Pro	Services oject /Organizational Readiness nding Request and Accomplishment Budget ority Needs get Population oject Cost Budget oject Cost Budget oject Cost Budget Descriptions erating Costs Budget

PUBLIC SERVICES, HOUSING REHABILITATION, OR PUBLIC FACILITIES AND IMPROVEMENT REQUEST FOR PROPOSALS

SECTION 1 INTRODUCTION

1.1 <u>Introduction</u>

Under Title I of the Housing and Community Development Act of 1974, as amended, the County of Orange meets the qualification of an Urban County. Under federal regulations, Urban Counties are eligible to receive and allocate Community Development Block Grants (CDBG), HOME Investment Partnership (HOME) and Emergency Shelter Grants (ESG). As required, Urban Counties must submit a long ranging planning document, the Consolidated Plan, every five years to the U.S. Department of Housing and Urban Development (HUD).

The Consolidated Plan combines into a single submission a jurisdiction's overall housing and community development needs, outlines the strategy to address those needs through the use of federal funds (i.e., CDBG, HOME, and ESG), and lays a foundation for the Urban County's grant application requirements.

This RFP is soliciting proposals which meet a high priority need as outlined in the Consolidated Plan. Proposals, which are awarded funding, will become part of the Urban County's Annual Action Plan, to be submitted to HUD, in May of 2009.

1.2 Urban County Background

The County of Orange Urban County program receives a yearly allocation from HUD that uses a HUD fair-share formula based on the needs of the participating cities and unincorporated target areas. Table 1 identifies the participants of the Urban County program that are represented by 12 unincorporated target areas and 13 participating small cities and the Metropolitan City of Yorba Linda.

TABLE 1 Urban County Participating Jurisdictions and Unincorporated Areas					
Unincorporated Areas					
Anaheim Island	Mac Island	Rustic Lane			
Anaheim "Colonia" Independencia	Midway City	Sherwood Forest			
El Modena	North East El Modena	Southwest Anaheim			
Inter-Canyons	Olive Island	West Anaheim			
Participating Small Cities					
Aliso Viejo	Laguna Beach	Seal Beach			
Brea	Laguna Hills	Stanton			
Cypress	Laguna Woods	Villa Park			
Dana Point	Los Alamitos				
La Palma	Placentia				
Participating Metropolitan "Metro" City					
Yorba Linda					

Source: OC Community Services

1.3 Funding Levels

Based on the needs identified in the Consolidated Plan, County staff has estimated the percentage of funds to be allocated toward each proposed activity for the FY 2009-10 Annual Action Plan. OC Community Services intends to allocate the following percentage of its estimated funding allocation to Public Services, Housing Rehabilitation, and Public Facilities and Improvement projects:

TABLE 2 ESTIMATED FUNDING ALLOCATIONS PROPOSED FOR FY 2009-20	10
	Percentage Range
Affordable Housing* (Assumes all HOME funds including 15% HOME CHDO mandate and funding for both affordable rental and homeownership under a separate NOFA)	22% - 29%
Housing Rehabilitation (CDBG)	15% - 23%
Public Facilities and Improvement (CDBG)	22% - 26%
Public Services (Includes maximum CDBG limit of 15%, plus ESG, and local HSS funding)	18% - 22%
Economic Development ** (Only technical assistance is considered a high-priority)	0%
Percentage of Total Funding	100%

Source: OC Community Services

1.4 RFP Timetable

The timetable is as follows:

Release of RFP	November 4, 2008
Bidder's Conference	November 6, 2008
Proposal Due Date	November 25, 2008 by 3:00 p.m.
Appeals Process	January 6, 2009 - January 13, 2009
Board consideration of funding recommendations	April 21, 2009 & May 12, 2009
Project Implementation	July 1, 2009

Note: Dates in timetable are subject to change

1.5 Eligible Activities

This RFP is only applicable to public services, housing rehabilitation, or public facilities and improvement activities located in one of the Urban County's participating jurisdictions or unincorporated areas.

1.6 Eligible Applicants

To be eligible, applicants must have three consecutive years of documented experience administering federal, state, local or private funds to provide products/services to clients.

Who should apply for the Urban County CDBG allocation?

Two categories of applicants are eligible to apply for funding through this RFP:

Category I: Local governmental units participating in the Urban County Program.

Category II: Non-profit organizations.

^{*} Affordable Housing funding is distributed through a separate Notice of Funding Availability

^{**} The high-priority identified in the Consolidated Plan for Economic Development is technical assistance and employment training, which is a Public Service.

New applicants:

A new applicant is defined as an organization that has not received an Urban County CDBG/HOME/ESG/HSS allocation to provide their clients products/services for the past three years. OC Community Services staff will conduct a site visit for all new applicants, with the exception of governmental entities.

The site visit consists of a scoring system of 30 possible points. Applicants must receive a minimum site visit score of 25 points in order to meet a threshold review. During the site visit, OC Community Services staff will ask a series of questions relating to:

- Performance reports required by other funding organizations for the activity proposed in their application.
- Organizations capacity to manage a grant.

Current Applicants:

A current applicant is defined as an organization currently holding an OC Community Services contract and/or an organization that has held an OC Community Services contract within the past three years.

1.7 Funding Allocation Process

A. Competitive Funding Process

The Urban County program distributes federal and local funds in a competitive process. The following activities are funded through a Request for Proposal Process (RFP):

- Public Services (a three-year funding cycle, 2009-10-11-12)
- Housing Rehabilitation (a three-year funding cycle, 2009-10-11-12)
- Public Facilities and Improvements on an annual basis
- Economic Development (The high-priority identified in the Consolidated Plan for Economic Development is Technical Assistance and Employment Training which are Public Services)

This Request for Proposal is for Public Services, Housing Rehabilitation, and Public Facilities and Improvement activities.

B. Rental Housing Development and Homeownership

New Housing construction/acquisition project proposals will <u>not</u> be accepted as part of this RFP. A separate Notice of Funding Availability (NOFA) process will be issued to address these activities utilizing HOME funds and 20% set-aside.

C. Threshold Review

Applications will go through an initial threshold review by OC Community Services staff. The main purpose of this review is to determine if the project is eligible for HUD funding. Incomplete applications will not pass this threshold review. However, OC Community Services reserves the right to waive a minor technical deficiency in an application and request the applicant to provide minor corrections or clarifications. Minor deficiencies/corrections include but are not limited to: failure to sign application, missing supporting documentation, missing email address, fax or phone numbers, typos, calculation errors. Applicants will receive a deficiency notice and will be asked to resubmit or clarify any deficient information within three to five days of receiving notification. Failure to respond to OC Community Services or submittal of an application with a major deficiency (including; but not limited to, an ineligible activity) will result in an application not passing threshold review. There is no appeal process at this level of review.

D. Application Review Committee

The Application Review Committee (ARC) is an evaluation team comprised of a committee of professionals, knowledgeable about community development, community services, and housing activities. The ARC is subdivided into two sub-committees: Public Services and Housing Rehabilitation/Public Facilities and Improvements. ARC will score the applications based exclusively on the written submission by the applicant. Applications will be ranked and scored, 70 points being the minimum score allowed for consideration. The highest scoring applicant will be ranked first and all other applicants will be ranked in descending order.

The proposal review process is applied consistently from project to project so that there is consistency in the allocation process. The proposal review process makes an effort to offer maximum institutional flexibility to allocate funds to carry out roles and missions established by OC Community Services. Using a straightforward approach, the ARC applies a system-wide process to reviewing proposals. OC Community Services staff provides technical support to the ARC but does not rank applications or participate as voting members in the review process.

E. Steps in Proposal Review Process

Below are the main steps in the RFP application review process:

 OC Community Services staff conducts a threshold review of all applications for completeness and to verify project eligibility based on federal regulations.

- Applications that pass the threshold review process will be forwarded to ARC for review and scoring.
 Applications that do not pass the threshold review process are eliminated from further ARC consideration with no appeal process.
- 3. ARC members individually review and score each application.
- 4. Applicants may appeal the scoring and/or funding recommendation (see Section 4.1 Appeal Procedure).
- 5. ARC makes final recommendations addressing any appeals.
- 6. Projects recommended for funding are compiled and presented to the public for comment in the draft Annual Action Plan and later to the Board of Supervisors for approval.
- 7. Projects are preliminarily awarded funding until final approval is received from HUD.

F. Key Policies

- 1. Applications for projects requesting less than \$15,000 per year will not be considered.
- Funding requests from one applicant cannot exceed 35% of total funding available for Housing Rehabilitation or Public Facilities & Infrastructure applications.
- Only one application from any organization serving the same population with the same service, or providing the same program or product, will be accepted.
- 4. The project must meet a national objective as identified by HUD regulations, (24 CFR 570.200).
- The application must be for an eligible project as defined by HUD regulations, (24 CFR 570.201 and 570.202).
- The population to be served or to benefit from the project must principally be low to moderate-income as defined in Attachment B.
- 7. If the applicant is a current or past recipient of assistance under a HUD McKinney Act program (i.e., SuperNOFA) or the HUD Single-Family Property Disposition Program, there must be no project or construction delays, HUD findings, or an outstanding audit that HUD deems serious, regarding the administration of HUD McKinney Act programs or the HUD Single-Family Property Disposition Program.
- 8. The applicant must be in compliance with applicable civil rights laws and Executive Orders. There must be no pending civil rights suits, outstanding findings of non-compliance with civil rights statutes, Executive Orders, regulations, unresolved secretarial charge of discrimination issued under the Fair Housing Act, no adjudications of civil rights violations on a civil action, or deferral of processing of applications from the applicant imposed by HUD.
- 9. The applicant must provide a copy of the Organization's 501(c)(3) certificate. Also the applicant must provide an IRS tax-exempt letter dated no earlier than January 2008, or a Certificate of Status provided by the Secretary of State, Business Programs Division. Certificates of Status can be found at http://www.sos.ca.gov/business/pdf/be_ircform.pdf (which may take as long as 24 days). Please attach to the application under Exhibit 9: Non-Profit Standing.
- 10. The applicant must submit a copy of their organization's most recent audit (within the last two years) by an independent, certified CPA and a description of corrective action taken for any finding identified by the auditor, both of which will be reviewed by OC Community Services Accounting Manager or designated staff.
- 11. The County of Orange reserves the right to reduce the funding request submitted by applicants, or not fund multiple requests by the same applicant in order to maximize the distribution of funds.

1.8 <u>Urban County Priorities</u>

The priorities for the Urban County program were established during the development of the Fiscal Year 2005-2010 Consolidated Plan. The Consolidated Plan identifies, within a five-year reporting period, the Urban County's needs for Affordable Housing (rental/owner) as seen on Table 3, Public Facility needs; Infrastructure Needs and Public Services needs as seen on Table 4; and Special Needs Populations as seen on Table 5. Additionally, a major component of the Consolidated Plan is the Strategic Plan that outlines the County's long-term goals and prioritized its housing and non-housing needs.

A. Priority Ranking

Based on the comprehensive Needs Assessment, priority rankings were assigned to each category of housing and community development needs as follows:

- High Priority: Activities to address this need are expected to be funded with Community Planning and Development (CPD) funds during the five-year period. Additional Urban County priorities include projects that fill the gap in the Homeless Continuum of Care which were not filled by SuperNOFA Homeless Assistance funding. Projects not eligible for funding under the SuperNOFA Continuum of Care competition for homeless assistance funds (e.g., emergency housing, homeless prevention) will be awarded priority points under this RFP. Priority funding consideration may also be given to applicants that have not received funding in the past.
- Medium Priority: If CPD funds are available, activities to address this need may be funded during the five-year period.
- Low Priority: The Urban County will not directly fund activities using CPD funds to address this need
 during the five-year period. However, the Urban County and participating cities may support
 applications for public assistance by other entities if such assistance is found to be consistent with this
 plan.

B. Projects Considered Non-Priority Projects

- Projects that contain eligible activities not identified on the priority charts (any other activity outside of the Consolidated Plan).
- Projects seeking funding for planning and administrative costs.
- Projects seeking funds for lead-based paint activity costs. These costs may be funded through funds received from other sources such as available rehabilitation funds, the Health-Homes or the Lead-Based Paint Hazard Control Program.
- Improvements to streets/alleyways located outside of income-qualified census tracts.
- Projects involving the construction and installation of street signs, improvements to building or portions thereof that are used for the general conduct of government.

C. Exemptions from the Funding Allocation Process

In addition to priority and non-priority rankings, the County exempts the following activities from the competitive process:

- Administration The County and Metropolitan City of Yorba Linda utilize a percentage of their allocations to administer the CDBG, HOME, ESG, and HSS funded programs.
- County's obligations to specific community centers within unincorporated areas
- County of Orange Cold Weather Shelter Program to receive ESG/HSS (or other appropriate source of funds).
- Fair Housing and Equal Opportunity related activities mandated by HUD.
- Funding associated with unincorporated areas, which are anticipated to annex within the program year.

Tables 3-5 on the following pages, were adapted from the County of Orange Consolidated Plan and represent the Urban County's community development needs and priorities for the Fiscal Years 2005-2010.

	FIVE-YEAR HO		BLE 3 ND PRIORITIES-UR	BAN COUNTY	
Priority H	ousing Needs	Income	Priority Need Level	Unmet Need ¹	Goals ³
		0%-30%	High	2,308	25
	Small Related ²	31%-50%	High	2,966	40
		51%-80%	High	3,801	15
		0%-30%	High	1,381	25
	Large Related	31%-50%	High	1,516	40
Donton		51%-80%	High	1,859	15
Renter		0%-30%	High	2,192	25
	Elderly/Disabled	31%-50%	High	1,702	40
	Γ	51%-80%	High	1,149	15
		0%-30%	Medium	1,657	20
	All Other	31%-50%	Medium	1,906	15
		51%-80%	Medium	2,749	
· · · · · · · · · · · · · · · · · ·		0%-30%	High	1,453	30
	Small Related	31%-50%	High	1,948	47
		51%-80%	High	4,015	78
		0%-30%	High	473	30
	Large Related	31%-50%	High	608	47
0		51%-80%	High	1,860	78
Owner		0%-30%	High	3,361	30
	Elderly/Disabled	31%-50%	High	4,148	30
		51%-80%	High	2,064	60
		0%-30%	Medium	824	30
	All Other	31%-50%	Medium	709	30
		51%-80%	Medium	1,539	58
pecial Populati	ons ⁵	0%-80%	High	N/A	
otal Goals					823
Section 215 Rer	nter Goals ⁴				275
Section 215 Ow	ner Goals				548

Source: County of Orange 2005-2010 Consolidated Plan Notes:

^{1.} Unmet needs are based on 2003 HUD Comprehensive Housing Affordability Strategy (CHAS) data based on 2000 Census for households with housing problems by household income and type.

^{2.} A small related household is defined by HUD as a household of 2 to 4 persons, which includes at least one person related to the householder by birth, marriage, or adoption. A large related household is a household of 5 or more persons, which includes at least one person, related to the householder by blood, marriage or adoption.

^{3.} Housing goals include anticipated accomplishments under the following programs: homeownership assistance programs; housing rehabilitation programs; and rental housing development.

^{4.} Section 215 Goals are affordable housing that fulfill the criteria of Section 215 of the National Affordable Housing Act. (For rental housing, a Section 215 unit is one that is occupied by a low income household and has a rent that is less than the Fair Market Rent or 30 percent of the adjusted gross income of a household whose income does not exceed 65 percent of the AMI)). For an owner unit assisted with homebuyer assistance, the purchase value cannot exceed HUD limit. For an ownership unit assisted with rehabilitation, the mortgage amount cannot exceed HUD limit.

^{5.} Housing goals for special needs groups are included under elderly and other households.

FIVE-YEAR COMMUNITY DEVEL	TABLE 4	•	AN COUNTY	
Priority Community Development Needs	Priority Needs Level	Goals	Estimated CPD Dollars to Address	
Public Facility Needs	•			
ADA/Architectural Barrier Removal	High			
Senior Centers	Medium	1	-	
Handicapped Centers	Medium]		
Homeless Facilities	High]		
Youth Centers	High]		
Child Care Centers	Medium]		
Health Facilities	Medium]		
Neighborhood Facilities/Libraries	Medium	Durana an actimated 00		
Parks and/or Recreation Facilities	High	Pursue an estimated 90 public facility and		
Parking Facilities	Medium	infrastructure	\$8,640,000	
Non-Residential Historic Preservation	Low	improvement projects.		
Other Public Facility Needs	Medium	improvement projects.		
Infrastructure Needs				
Water/Sewer Improvements	High]		
Street Improvements	High]		
Sidewalks	High]		
Solid Waste Disposal Improvements	Medium]		
Flood Drain Improvements	High			
Other Infrastructure Needs	Medium]		
Public Service Needs				
Senior Services	High			
Handicapped Services	High			
Youth Services	High	Assist 1,000 victims of		
Child Care Services	Medium	domestic violence, 1,000		
Transportation Services	Medium	seniors, 1,200 persons		
Substance Abuse Services	High	with disabilities, and	\$4,198,500	
Employment Training	High	1,200 persons with		
Health Services	Medium	substance abuse		
Lead-Hazard Screening	High	problems.		
Crime Awareness	Medium	_		
Other Public Service Needs	Medium			
Economic Development				
ED Assistance to For Profit	Medium	Goals for		
ED Technical Assistance	High	Technical Assistance		
Micro-Enterprise Assistance	Medium	And Employment Training included		
Rehab; Public/Private-Commercial Industrial	Medium			
CI Infrastructure Development	Medium	Under the Public		
Other Commercial/Industrial Improvements	Medium	Services Category.		
Planning and Administration	High	N/A		
Program Delivery	High	N/A	I	

Source: County of Orange 2005-2010 Consolidated Plan

TABLE 5 SUMMARY OF FIVE-YEAR OBJECTIVES FOR SPECIAL NEEDS POPULATIONS—URBAN COUNTY					
Elderly/Frail Elderly ²	High	27,270 elderly Households	\$500,000	Assist 1,000 elderly and frail elderly persons through a variety of senior programs and services.	
Physically Disabled	High			Assist 1,200 persons with disabilities. (The Regional Center of	
Severe Mental	High	66,595 Persons	\$600,000	Orange County is the primary agency for providing assistance to persons with disabilities. Physically disabled persons also receive assistance from the California Department of	
Developmentally Disabled	High			Rehabilitation through various housing programs).	
Persons with Alcohol/Other Drug Addictions ³	High	44,000 Persons	\$600,000	Assist 1,200 persons with substance abuse problems through various supportive services and programs.	
		35,000	\$500,000	Assist 1,000 victims of domestic violence.	
Homeless/At-		Persons - Countywide	\$760,000	Assist 1,520 persons with emergency services.	
Risk Homeless			\$1,400,000	Assist 2,800 persons with transitional, preventive, and supportive services.	
Persons with HIV/AIDS	High	3,100 Persons Countywide	Addressed as part of the Countywide HOPWA Strategy to be coordinated by the City of Santa Ana.		

Source: County of Orange 2005-2010 Consolidated Plan Notes:

- Unmet needs are based on Census and other estimates of the special needs population
 Elderly persons with special needs is based on CHAS estimates of lower and moderate income elderly households
 National estimates indicate 14-16 percent of adult males and six percent adult females having drug and alcohol problems

SECTION 2 PROPOSAL SUBMISSION REQUIREMENTS

2.1 Deadline for Submission

The County must receive proposals no later than November 25, 2008 at 3:00 P.M.

2.2 Applicant's Questions

Applicants may submit written questions regarding this RFP by fax or email to the OC Community Services staff identified below. All questions must be received by **November 17, 2008**. All questions, without identifying the submitting organization, will be answered and issued as a Q & A documents and sent via email to all applicants. No questions will be answered that would give an applicant a competitive advantage over other applicants. Applicants are encouraged to submit questions via email, particularly if the question is lengthy or technical in nature.

Anna Plank, Manager Community Development

E-Mail: anna.plank@hcs.ocgov.com

Fax: (714) 480-2881

2.3 Bidder's Conference

A Bidder's Conference will be held to discuss this RFP. County staff will respond to questions from potential applicants. The conference is scheduled for:

Date: November 6, 2008
Time: 1:30 P.M. – 3:30 P.M.
Place: OC Community Services
Multi-Purpose Room C
1770 N. Broadway
Santa Ana, CA 92706

2.4 Proposal Submission

Proposals must be hand-delivered or received via certified mail by November 25, 2008 at 3:00 P.M. to:

County of Orange OC Community Services Attn: Anna Plank, Manager 1770 N. Broadway Santa Ana, CA 92706

Until the proposal submission deadline, errors in proposals may be corrected by a request in writing to withdraw the proposal. All corrections must be made prior to the established deadline and the new set of corrections must be submitted. Corrections will not be accepted once the deadline for submission of proposals has passed unless requested by OC Community Services as part of the threshold review.

It is the sole responsibility of the applicant to ensure that its proposal is received before the submission deadline. The applicant shall bear all risks associated with delays in delivery by any person or entity, including the U.S. Mail. Any proposals received after the scheduled closing time for receipt of proposals, will be returned to the sender unopened. Timely hand-delivered proposals are acceptable. No facsimiles (fax) or electronic e-mail copies will be accepted.

Late submissions will not be accepted.

2.5 Preparation of the Proposal

Proposals must be submitted in the prescribed format on the application form provided. Letters of Commitment from leveraging resources should be submitted in the section where they are requested, see Exhibit 4: Leveraging. Any proposal that deviates from the application forms provided or is incomplete may be rejected without further review at the County's sole discretion.

The content and sequence of the proposal must be as follows:

- One (1) original proposal and five (5) copies.
- One-inch margins; single-sided; Verdana, size 10 point font; double-spaced.
- All pages numbered sequentially and in accordance with the Supporting Documents Checklist (Exhibit 1).
- Place dividers between each exhibit to facilitate review and evaluation.
- Clearly identify the original proposal and the copies of proposal on the front page.
- Bind each proposal separately in three-ring binders.

Proposals are not to be marked as confidential or proprietary. Proposals submitted in response to a RFP are subject to public disclosure as permitted by the California Public Records Act. Additionally, all proposals shall become the property of the County. The County reserves the right to make use of any information or ideas in the proposals submitted.

SECTION 3 TECHNICAL ELIGIBILITY/REVIEW AND EVALUATION CRITERIA

3.1 Advisory

The County of Orange does not require and neither encourages nor discourages the use of lobbyists or other consultants for the purpose of securing business.

3.2 <u>Technical Eligibility/Review</u>

The first step in evaluating applications consists of a threshold review process. Applications that do not pass the threshold review process will be eliminated from further consideration with no appeal process. All new applicants will also be required to undergo a site visit. The site visit consists of a scoring system of 30 possible points. New applicants must receive a minimum site visit score of 25 points in order to pass the threshold review process. The County of Orange will notify applicants whose applications did not meet site visit threshold.

Site Visit Scoring System:

- Effectiveness and Performance (15 points possible)
 Description of organization performance process; process for determining effectiveness/quality of programs and services; extent of measuring outcomes versus inputs.
- Board Governance (10 points possible)
 Description of nominating, recruitment, retention, rotation, recognition and orientation process, frequency of Board meetings and average attendance and description of organization sub-committees of the Board.
- Administration (5 points possible)
 Description of organization expectations for Executive Director; mission statement; evidence of staff and volunteer job descriptions for all positions; organization's policy on determination of fair and equitable salary administration for staff position; training and career enhancement opportunities for staff; benefit/compensation package offered to staff compared to similar agencies of size and fiscal capability; organization strategic planning process and role of Board/volunteers and staff in the creation, monitoring and overall evaluation of this process; diversification of organization, various sources of revenue, and organization cash reserve policy.

3.3 Scoring Evaluation Criteria

All proposals passing the minimum eligibility requirements will be evaluated based on the following scoring criteria and must score a minimum of seventy (70) points to be considered for funding.

Category 1	Priority Needs	30		
Category 2	ategory 2 Budget and Resource Leveraging			
Category 3	20			
Category 4	Category 4 Organizational Readiness, Capacity and Experience			
	Total	100		

Category 1. Priority Needs (30 points max)

The applicant must describe how the project meets an Urban County priority for which it is seeking funding; please reference Application forms: Activity 1d, Activity 2d, or Activity 3c: Priority Needs. Additionally, the applicant must provide a comprehensive description of the project's (1) priority, (2) sub-activity, (3) population(s) to be served, (4) accomplishment level, and (5) services to be provided. The applicants will be asked to describe why this project is needed, and cite evidence to substantiate the need.

- High priority projects will be awarded up to 30 priority points
- Medium priority projects will be awarded up to 20 priority points
- Low priority projects will be awarded up to 5 priority points

Category 2. Project Budget and Resource Leveraging (Up to 25 points)

Applicant must demonstrate a reasonable and efficient budget. Applicant must also demonstrate any leveraged resources available for the project. The applicant will be evaluated on the dollar amount of leveraged resources that they have secured and whether the resources are committed or anticipated resources. The budget and the leveraged resources are reviewed for the applicant's demonstration of utilization of funds to assure continued operations and services for the proposed project.

- Project Budget (Up to 10 points)
- Anticipated Leveraging Ratio (Up to 10 points)
- Committed Leveraging (up to 5 points)

Category 3. Performance Measurements (Up to 20 points)

The applicant must identify quantifiable performance objectives and outcomes. The applicant's project must have objectives and outcomes that are aimed at gradually advancing their target population towards accessible living situations through affordability and/or sustainability. The applicant must demonstrate comprehensive processes to collect data, monitor and track clientele success. The objectives and outcomes stated are to be realistic, time bound, and measurable for proposed clientele. Organizations must describe how they will measure and evaluate the success of the project. The proposals will be evaluated on the project's framework in conjunction with the project's objectives and outcomes.

Category 4. Organizational Readiness, Capacity and Experience (Up to 25 points)

The applicant, and any collaborators, partners, or other associates related to the project, must demonstrate organizational readiness, capacity, experience, and sustainability to carry out services under the proposed project. The organization(s) must demonstrate the knowledge and experience in operating the type of specific project activities proposed and display qualified principal staff related to carry out the proposed project services and anticipated role(s). The proposal should demonstrate the agency's organizational structure and identify the roles of key staff members and related information on how long key administrative, operational and service staff has worked in their fields and in the organization. Additionally, profiles of key staff members should indicate the relevant educational and licensing qualifications. For all applicants their organization and project's readiness to use the requested funding in the next fiscal year will also be evaluated in this category.

- Principal Staff Experience (Up to 10 points)
- Organizational/Project Overall Organizational Capacity and Experience (Up to 10 points)
- Project Readiness (Up to 5 points)

3.4 Equal Scoring Ranking Criteria

In the event of a tie in scoring the following will apply:

- 1) The highest cumulative score (not averaged);
- The applicant with the highest <u>Category 1. Priority Needs</u> score will be ranked higher; if still equal;
- 3) The applicant with the highest Category 4. Organizational Readiness, Capacity and Experience score will be ranked higher.

SECTION 4 APPEALS PROCESS

4.1 Appeal Procedure

Applicants that pass threshold but are not awarded a minimum of 70 points by ARC may, at their discretion, file an appeal. Any Applicant who alleges a grievance by the solicitation or award of a contract may submit an appeal or protest to OC Community Services. The appeal must be submitted within five (5) business days after the notice of the proposed contract award is provided by OC Community Services to:

Karen Roper, Director OC Community Services 1770 N. Broadway Santa Ana, CA 92706 Fax: (714) 480-2803

Any appeal received after five (5) business days will not be accepted.

All appeals shall be typed under the protester's letterhead and submitted in accordance with the provisions stated herein. All protests shall include at a minimum the following information:

- The name, address and telephone number of the protester;
- The signature of the protester or the protester's representative;
- The solicitation name;
- A detailed statement of the legal/and or factual grounds for the protest; and
- The form of relief requested.

Upon receipt of a timely appeal, OC Community Services will within ten (10) business days of the receipt of the appeal, issue a decision in writing which will state the reasons for the actions taken.

If the appeal is denied by OC Community Services the protester may submit a written protest to the Office of the County Purchasing Agent requesting an appeal to the Procurement Appeals Board. The Office of the County Purchasing Agent is located at 1300 S. Grand Ave., Bldg. A, Santa Ana, CA 92705. Instructions on how to appeal to the Office of the County Purchasing Agent will be included in the OC Community Services letter of denial to the protester.