



**COUNTY OF ALAMEDA
COMMUNITY DEVELOPMENT AGENCY
HOUSING AND COMMUNITY DEVELOPMENT DEPARTMENT**

**Notice of Funding Availability and
Request for Qualifications (RFQ)**

*Scalable Housing Infill Funding Toolkit (SHIFT): Senior ADU
Program Administration Services*

**RELEASE DATE:
Monday, September 14, 2026**

Application Due Date

Applications will be reviewed beginning Monday, **October 9, 2026 by 5pm**. This is an electronic submission; hard copies will not be accepted. The application will be submitted via email to HCDRFP@acgov.org. Applicants are strongly encouraged to submit applications in advance of the deadline to avoid technical issues. **If you have any questions, please contact at HCDRFP@acgov.org**

Please be aware that under California Public Records Act, all documents submitted in response to this RFQ are considered part of the public record and will be made available to the public, upon request, following the application deadline.

Contents

I.	FUNDING AVAILABLE	3
II.	APPLICATION DUE DATE	3
III.	PROGRAM SUMMARY	5
IV.	RFP, APPLICATION SUBMISSION, REVIEW AND FUNDING PROCESS	7
V.	PROTESTS/APEALS PROCESS	9
VI.	BASIC (MINIMUM) THRESHOLDS AND EVALUATION CRITERIA.....	13
VII.	RATING AND RANKING EVALUATION CRITERIA	13
VIII.	APPLICATION SUBMISSION CHECKLIST	14
IX.	LIST OF APPENDICES.....	16

Funding Available

Through this Notice of Funding Availability (NOFA) and Request for Qualifications (RFQ) the Alameda County Housing and Community Development (HCD) is seeking qualifications from firms able to administer the design, launch, and project administration for the Scalable Housing Infill Funding Toolkit (SHIFT) Senior ADU Pilot Program. The selected firm will support HCD finalizing the program and, as funding allows, directly support and oversee the development of Accessory Dwelling Units (ADUS) for seniors.

Each proposal must include a summary of the applicant's qualifications, technical capabilities, and relevant experience that demonstrate its readiness to deliver on the goals of this initiative.

Successful applicants will have documented experience:

- Working with planning and housing departments to deliver similar local programs
- Managing small scale construction projects in infill areas and ensuring they are on-time and under budget
- Successfully administering lot-splits using SB 9
- Recruiting and providing high-touch development services for homeowners and seniors
- Putting into place the financial commitments for a small scale construction project

The successful applicant must be willing and able to meet Alameda County's contracting requirements as set forth in this RFP. HCD will serve as the main point of contact for the selected applicants, including preparing the contract for approval by the Alameda County Board of Supervisors, overseeing entity contract implementation, and ensuring outcomes are met.

Application Due Date

Applications must be submitted via email to HCDRFP@acgov.org by **5pm October 9, 2026** (**"Application Due Date"**). Additional information on the on-line application process may be found in Appendix G of this RFQ and will be provided at the optional Info Session. If you have any questions, contact HCD at HCDRFP@acgov.org.

Applications become public records. Applicants should understand that, under the California Public Records Act, all documents that are submitted in response to this RFQ are considered part of the public record and will be made available to the public, upon request, following the application deadline. The County reserves the right to suspend, amend, or modify the provisions of this RFP, to reject proposals, to negotiate modifications of proposals, or to award less than the full amount of funding available. Alameda County is an Equal Housing Opportunity and Accessible Housing Provider.



Schedule of Events

EVENT	TARGET DATE
Post/Publish RFQ on HCD Website	Monday, September 14, 2026
Optional Informational Session	11:00 am Thursday, September 17, 2026
Written questions to due HCD HCDRFP@acgov.org	5pm Monday, September 21, 2026
HCD Issues FAQ Document	Tuesday, September 22, 2026
Application Due	5pm Friday, October 9, 2026
Begin County Selection Committee Review Period / Completeness Review, Additional Applicant Information Requests	October 5, 2026
Earliest Intent to Award Funds or Notice of Intent to Not Award Funds letters sent to RFQ applicants	October 12, 2026
**Board of Supervisors meeting to approve funding recommendations and contracts	January 2027
<i>*Bidders' Conference and Technical Assistance Session: A technical assistance session will be offered for prospective applicants as a virtual meeting. Registration links and times will be posted on HCD's funding opportunities webpage. An overview of the RFQ and instructions on the application process will be provided.</i>	

***Please note that these are tentative dates that may need to be adjusted based on changes to the Board of Supervisors meeting schedule, as well as any appeals that are submitted and addressed pursuant to the appeals procedures contained in this RFP.*

Program Summary

The Alameda County Housing and Community Development Department (HCD) is seeking partnership proposals for the Scalable Housing Infill Funding Tool (SHIFT). SHIFT will pilot a variety of new housing production models to prove the viability of low-cost, high-impact infill housing.

There is a critical need to incentivize cost reduction in residential construction to effectively reintroduce more affordable housing types, broadly defined as "missing middle," back into the development pipeline. The SHIFT program directly addresses this need by prioritizing affordability through strategic reductions in both hard construction costs—achieved through cost-efficient architectural and engineering solutions—and soft costs, which are lowered by streamlining approvals and simplifying regulatory compliance. By combining rigorous cost engineering with thoughtful program design, SHIFT seeks not only to deliver affordable housing units, but to build affordable units more affordably. This cost-conscious approach ensures that limited public subsidies can stretch further, with the long-term goal of priming the pump for private housing development and restoring the economic viability of moderate-density housing types that have been largely underrepresented in California's residential landscape.

The Senior ADU Pilot Program is the second of SHIFT's development programs, after the SHIFT Affordable Multifamily Pilot Program. The Senior ADU Program will provide funding and technical support for eligible senior homeowners to convert accumulated home equity into a new, accessible accessory dwelling unit on their property. The program will utilize the State's SB 9 lot-split pathway as well as the AB 1033 ADU condominium conversion pathway, and be supported with construction financing from a partnering Community Development Financial Institution (CDFI) as well as County investment in the form of a shared appreciation loan. Projects will not use tax credit financing or any other source of federal, state, or local subsidy and will target a total development cost comparable to unsubsidized market rate developments. Each transaction will add new ADU housing, support seniors seeking to age safely in their communities, and return larger homes to the market for larger households.

In the initial pilot phase, HCD anticipates contracting with one applicant qualified through this RFP, however, dependent on additional funding, additional contractors may be selected from this procurement to provide a greater volume of homeowner facing and project management services.

Each submission should include two key components:

- A project proposal that outlines how the submitter will fulfill the scope of work outlined in this RFQ
- a summary of the applicant's qualifications, technical capabilities, and relevant experience that demonstrate its readiness to deliver on the goals of this initiative.

Specific materials to be included in submissions can be found in Section VIII of this RFP.

Scope of Services

Alameda County Housing and Community Development (HCD) invites proposals from qualified

firms or partnerships experienced in program design, project financing, cost-effective construction management, and homeowner facing service delivery. The selected applicant will work closely with Alameda County HCD to fulfill the following responsibilities:

Program Development and Design Services:

1. **Financing Structure:** Develop and document the Program financing structure and repayment waterfall. Includes developing methodology to size loans relative to appraised home equity and construction cost; mapping the CDFI co-lending process and the County subordinate (Measure A1 Innovation Fund) position and security; modeling sources and uses and the appreciation-sharing waterfall under base and conservative scenarios; and validating the all-in construction cost assumption against SHIFT construction product options and representative site-specific cost variables.
2. **Transaction Document Set and General Program Design:** Draft the transaction-level and program-level documents in coordination with HCD and County Counsel, including the Program guidelines, the participant program agreement, the financing disclosures, the lot-split and partial-release checklist.
3. **Review of Service Providers:** evaluate potential development partners identified through a separate HCD procurement to act as general contractors/construction leads for senior ADUs, including evaluating portfolios of work and conducting basic underwriting to ensure suitability for the project.

Participant Recruitment and Management:

1. **Eligibility Criteria:** Develop and finalize eligibility criteria for potential program participants based on HCD outlines, specifically determining maximum and minimum incomes, equity requirements, length of tenure standards, and other criteria as needed to determine successful homeowner participants.
2. **Marketing Materials:** Draft and promulgate materials aimed at potential program participants that make clear the opportunity, eligibility requirements, and development process.
3. **Application Design and Intake Administration:** Design the end-to-end participant process across all program phases, from outreach and intake through construction and post-occupancy. Activities include the application and eligibility-verification workflow; the lottery and weighted-preference framework and tie-breaking rules; the site-feasibility screening approach; the homeowner navigation and counseling touchpoints; and the deal-level lender consent and partial-release process map for the lot split, which is the Program's most significant procedural risk point.
4. **Applicant Selection:** Support HCD in reaching launch readiness, including establishing the initial applicant queue and intake pipeline and preparing the materials required for the subsequent Board action to authorize Program administration, the Measure A1 Innovation Fund lending parameters, and the SAL terms.

Construction and Lot-Split Administration:

1. **Pre-Development for Selected Applicants:** Undertake underwriting in partnership with CDFI collaborators and acquire all necessary approvals for project construction. Work with selected construction contractors to ensure that projects are ready for construction within 12 months of selection.

2. **Oversee ADU Construction:** Act as the construction manager for ADU construction, ensuring that work is completed on time and under-budget and with minimal disturbance to the homeowner.
3. **Administration of Lot Split, Homeowner Move, and Primary Residence Sale:** Ensure homeowners are moved in once ADUs are completed, process a lot split using the State's SB 9 methodology once ADUs are completed and residents moved in, and administer the sale of the former primary residence on the open market.

Proposed Timeline

The following timeline outlines the key phases and responsibilities for the program administrator(s) selected through this RFP. The chosen administrator will collaborate closely with Alameda County Housing and Community Development (HCD). The timeline below is an estimate only and subject to refinement in collaboration with the selectee.

1. Contract Development and Execution (Months 1–3)

- Finalize scope of work, deliverables, and compensation terms.
- Finalize insurance certificates and requirements
- Establish detailed schedules and benchmarks in coordination with Alameda County HCD.
- Execute contract approved by Alameda County Board of Supervisors.

2. Program Design and Participant Recruitment (Months 4–10)

- Finalize financing structure including loan size and lending process
- Draft legal and financial documents as well as finalize program guidelines and eligibility criteria with HCD Staff
- Draft and distribute marketing materials aimed at eligible senior homeowners
- Develop a process to screen, evaluate, and select applicants

3. Construction Administration (Months 10-28)

- Select construction partners through the County's existing pools
- Oversee construction of ADUs, manage homeowner input, and administer lot-splits

RFP, Application Submission, Review and Funding Process

Information Session and Bidders Conference

Those interested in submitting an application in response to this RFQ are encouraged to attend the information session where HCD will present the RFQ content, the application formats, and proposal submission instructions. The Bidder's Conferences will take place at 11:00 am on Thursday, September 17, 2026 [You can register here.](#)

On-Line Application Requirement

Interested parties' will apply directly to the County via email to HCDRFP@acgov.org. After the initial conferences, subsequent bidders' conferences will be scheduled as needed, in coordination with potential applications.

Frequently Asked Questions (FAQs)

FAQs will be posted publicly after the Info Session and revised as needed after subsequent conferences. Applicants must email all questions regarding the RFQ and/or application process to HCDRFP@acgov.org. HCD will respond to all questions in a consolidated Frequently Asked Question (FAQ) document that will be sent on Tuesday, September 22, 2026. This FAQ will reflect questions received via email and discussed during the Conference.

All contact during the RFQ process and evaluation phase shall only be through the designated email for the RFQ at HCDRFP@acgov.org. Applicants shall neither contact nor lobby County staff or evaluators during the evaluation process. Attempts by the applicant to contact and/or influence application evaluators may result in disqualification of the applicant.

Revisions to RFP

If it becomes necessary to modify any aspect of this RFP, HCD will provide an addendum to on the website.

Modifications to Submittals

Applicants may not modify their Submittal at any time after the due date, except in direct response to a request from HCD for clarification. Any Submittal and proposed information items must be valid for at least 180 days after submission.

Expense of Preparation

HCD is not responsible for any expense incurred in preparation of submittals or in any action in connection with the process, or for the costs of any services performed in connection with submittal, interviews, or approval process.

Reservation of Rights

HCD reserves the right to conduct any investigation of the qualifications of any proposer that it deems appropriate, negotiate modifications to any of the items submitted, request additional information from any proposer, extend the deadline, reject any or all submittals, and waive any irregularities. HCD retains the right to negotiate the terms and services in any submittal. HCD retains the right to cancel this process, extend the deadline, re-start the process or not select any provider.

Review and Funding Process

Subsequent to the Application due date, Applications will be reviewed by HCD for completeness and adherence to the system requirements outlined in the RFP.

Please note:

- Incomplete applications will not be accepted.
- Staff may ask clarifying questions of applicants after the Application due date and require submittal of additional documentation or responses to questions. Staff will include this information as part of the review process.
- Proposals that do not meet the basic thresholds may be rejected, may not be rated or ranked, and may not be considered for a funding award, at the Housing Director's sole discretion.
- HCD reserves the right to refuse funding for any and all applications, at the Housing Director's sole direction.

Evaluation Process

To be considered for funding, applications will first be evaluated on the basis of whether they have met the **basic thresholds** as outlined in Exhibit B of this RFP. Qualified proposals that have passed the basic thresholds will then be scored (rated) based on the evaluation criteria (the "**evaluation criteria**") as set forth in Exhibit B of this RFP.

A County Selection Committee (CSC) will individually review, evaluate, and score rank the proposals. The CSC will meet initially in October and as needed thereafter to review proposals, assign scores, and make final funding recommendations to HCD.

HCD reserves the right to:

1. Withdraw this solicitation at any time without prior notice and, furthermore, makes no representation that any contract will occur and that funds will be awarded to any respondent to this solicitation;
2. Waive any irregularities in the RFQ process and to reject any and all submissions not in the best interest of Alameda County;
3. Request additional information and material;
4. Fund any application at any amount in order to further Alameda County's goals and objectives on housing issues; and
5. Retain all submitted applications.

Selection or rejection of an application does not affect these rights.

At the conclusion of the RFQ response evaluation process, all applicants will be notified by email of the contract award recommendation(s), if any, by HCD. The document providing this notification is called the **Notice of Recommendation to Award/Not Award**. The Notice of Recommendation to Award/Not Award will provide the name of the applicant being recommended for contract award, if any, and the names of all other parties that submitted applications.

Protests/Appeals Process

HCD will abide by the following appeals policy. For the purposes of this section, applicants will be referred to as 'proposers', appeals will be referred to as 'protests' and applicants who have submitted appeals will be referred to as 'protestors'.

- A. HCD 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 proposers wish to protest the selection process or appeal the recommendation to award a contract once the Notices of Intent to Award/Non-Award have been issued. Protests submitted prior to issuance of the Notices of Intent to Award/Non-Award will not be accepted by the County.
1. A protest of the award notice by a proposer must be submitted in hard copy to Michelle Starratt, HCD Director, 224 W. Winton Avenue, Room 108, Hayward CA 94544 or by email to HCDRFP@acgov.org **before 5:00 p.m. of the FIFTH (5th) business day following the date of issuance of the Notice of Intent to Award by email, NOT the date received by the Bidder of a hard copy mailed through the US postal service.** A protest received after 5:00 p.m. is considered received as of the next business day.
 2. Protests must be based on threshold determination, or the points awarded to the protestor's application under the evaluation criteria. Protests may not be based on subjective criteria.
- B. The protest must contain a complete statement of the basis for the protest, including the rationale and underlying facts supporting the protest.
- C. The protest must refer to the specific portions of all documents that form the basis for the protest.
- D. The protest must include the name, address, email address, fax number and telephone number of the person representing the protestor, which will be used for communicating about the protest with the protestor regarding the protest.
- E. HCD will transmit a copy of the protest to all proposers as soon as possible after receipt of the protest.
- F. Upon receipt of written protest, the HCD Director, or designee will review and evaluate the protest and issue a written decision. The HCD Director may, at her discretion, investigate the appeal, obtain additional information, and provide an opportunity to settle the protest by mutual agreement and/or schedule a meeting with the protesting proposer and others, as appropriate, to discuss the protest.
1. The decision on the protest will be issued at least ten (10) business days prior to the first County Committee scheduled to hear recommendations. If additional levels of protest are received, the anticipated meeting date at which the recommendations will be heard may be altered.
 2. The decision will be issued by e-mail and U.S. Postal Service to the protestor and will inform the protestor whether the recommendation to the Board of Supervisors in the Notice of Intent to Award is going to change. A copy of the decision will be furnished to all proposers affected by the decision. As used in

this paragraph, a proposer is affected by the decision of a protest if a decision on the protest could have resulted in a change in the recommendation in regard to their application.

- G. The decision of the HCD Director on the protest may be appealed to the County's GSA—Office of Acquisition Policy, ATTN: Contract Compliance Officer, located at 1401 Lakeside Drive, 10th Floor, Oakland, CA 94612, Fax: (510) 208-9720, before 5:00 p.m. of the FIFTH (5th) business day following the date the decision is communicated by the HCD Director (not the date the communication is received by the protestor). A protest received after 5:00 p.m. is considered received as of the next business day. A protest received after the FIFTH (5TH) business day following the date of issuance of the decision by the HCD Director shall not be considered under any circumstances by the GSA.
1. In reviewing protest appeals, GSA will not re-judge the proposal(s). The protest to the OCCR shall be limited to review of the procurement process to determine if the contracting department (HCD) materially erred in following the RFQ or, where appropriate, County contracting policies or other laws and regulations.
 2. The protest must contain a complete statement of the reasons and facts for the protest.
 3. The protest must refer to the specific portions of all documents that form the basis for the protest.
 4. The protest must include the name, address, e-mail address, fax number and telephone number of the person representing the protesting party.
 5. The County Agency/Department will notify all protestors of the protest as soon as possible.
- H. Upon receipt of written protest, GSA—Office of Acquisition Policy, or designee will review and evaluate the protest and issue a written decision. The GSA—Office of Acquisition Policy, may, at its discretion, investigate the protest, obtain additional information, provide an opportunity to settle the protest by mutual agreement, and/or schedule a meeting(s) with the protestor and others (as appropriate) to discuss the protest. The decision on the protest will be issued at least ten (10) business days prior to the first County Committee scheduled to hear recommendations. If additional levels of protest are received, the anticipated meeting date at which the recommendations will be heard may be altered. The decision will be communicated by e-mail, fax, or US Postal Service mail, and will inform the protestor whether or not the recommendation to the Board of Supervisors or GSA in the Notice of Intent to Award is going to change. A copy of the decision will be furnished to all Bidders affected by the decision. As used in this paragraph, a Bidder is affected by the decision on a protest if a decision on the protest could have resulted in the Bidder not being the apparent successful Bidder on the RFP.
- I. The decision of the GSA—Office of Acquisition Policy on the protest may be appealed to the Auditor- Controller's Office of Contract Compliance & Reporting

(OCCR) located at 1221 Oak St., Room 249, Oakland, CA 94612, Fax: (510) 272-6502 unless the OCCR determines that it has a conflict of interest in which case an alternate will be identified to hear the protest and all steps to be taken by OCCR will be performed by the alternate. The protestor whose Bid is the subject of the protest and all Bidders affected by the GSA–Office of Acquisition Policy’s decision on the protest have the right to appeal if not satisfied with the GSA–Office of Acquisition Policy’s decision. All protests to the Auditor-Controller’s OCCR shall be in writing and submitted within five (5) business days following the issuance of the decision by the GSA-Office of Acquisition Policy, not the date received by the protestor. A protest received after 5:00 p.m. is considered received as of the next business day. A protest received after the FIFTH (5TH) business day following the date of issuance of the decision by the GSA Office of Acquisition Policy shall not be considered under any circumstances by the GSA or the Auditor-Controller OCCR.

1. In reviewing protest appeals, the OCCR will not re-judge the proposal(s). The protest to the OCCR shall be limited to review of the procurement process to determine if the contracting department materially erred in following the Bid or, where appropriate, County contracting policies or other laws and regulations.
2. The protest shall specify the decision being appealed and all the facts and circumstances relied upon in support of the protest.
3. The protest to the OCCR also shall be limited to the grounds raised in the original protest and the decision by the GSA-Office of Acquisition Policy. As such, a protestor is prohibited from stating new grounds for a protest in its protest. The Auditor-Controller (OCCR) shall only review the materials presented to, the process of and conclusions reached by the GSA-Office of Acquisition Policy or department designee and will determine whether to uphold or overturn the protest decision.
4. 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.
5. The decision of the Auditor-Controller’s OCCR is the final step of the appeal process. A copy of the decision of the Auditor Controller’s OCCR will be furnished to the protestor, the Bidder whose Bid is the subject of the Bid protest, and all Bidders affected by the decision.
6. The County will complete the Bid protest/appeal procedures set forth in this paragraph before a recommendation to award the Contract is considered by the Board of Supervisors.
7. The procedures and time limits set forth in this paragraph are mandatory and are each Bidder's sole and exclusive remedy in the event of Bid Protest. A

Bidder's failure to timely complete both the Bid protest and appeal procedures shall be deemed a failure to exhaust administrative remedies. Failure to exhaust administrative remedies, or failure to comply otherwise with these procedures, shall constitute a waiver of any right to further pursue the Bid protest, including filing a Government Code Claim or legal proceedings.

Basic (Minimum) Thresholds and Evaluation Criteria

Applications submitted in response to this RFQ will be assessed against **basic thresholds** and **evaluation criteria** in order to evaluate, rate and rank these applications. Applications will first be reviewed by HCD staff to determine if the basic thresholds are satisfied. Proposals must meet all threshold requirements in order to be considered for funding.

The team of applicants must jointly meet **the following minimum qualifications** to be considered for the contract:

1. Be regularly and continuously engaged in the business of providing homeowner or senior services, construction management, or similar services in alignment with those identified in the Scope of Services in California, ideally within the Bay Area County. Successful applicants will have a proven track record.
2. Have demonstrated experience and success managing small size infill development and utilizing state densification measures, ideally including work in the Bay Area.
3. Have signed forms in **Exhibit A (Submittal Addendum)** acknowledging and agreeing to all County terms, conditions, certifications and requirements, including the ability to meet minimum applicable Alameda County insurance requirements for contractors attached in **Exhibit B (Insurance Requirements)**.
4. Have capacity to serve in the Program Administrator role, coordinate with HCD staff, and meet communication and reporting requirements as required by the Scope of Services.

Rating and Ranking Evaluation Criteria

Applications will be evaluated based on:

- **Program Design Partnership Proposal (30 points)**
 - **Proposal Alignment (10 points)**
Clear understanding of the pilot's objectives and its broader role in advancing the SHIFT program.

- **Collaborative Approach (10 points)**
Demonstrated effective strategy for collaboration with public agencies to ensure program success and fulfill program goals.
- **Partnership Timeline (10 points)**
Realistic timeline with clearly defined and achievable deliverables aligned with program objectives.
- **Applicant Qualifications (60 points)**
 - **Development Capacity (10 points)**
Adequate staffing and personnel resources to serve as program administrator beginning in January 2027 and throughout the contract duration, demonstrated experience with similar-scale residential projects and services. Proposal includes references that can speak to the quality of the applicant's work.
 - **Service Expertise (10 points)**
Proven experience providing direct services to seniors and homeowners for home repair, construction, or other development projects.
 - **Financial Experience (10 points)**
Expertise building the capital stack, underwriting, and creating financial documents to support development projects
 - **Administrative Expertise (10 points)**
Demonstrated experience processing SB 9 lot splits or similar densification measures.
 - **Compliance Expertise (10 points)**
Proven capability to support Alameda County HCD in refining program requirements based on practical experiences during project implementation.
 - **Cost and Timeline Reliability (10 points)**
Demonstrated track record in accurately forecasting and reliably meeting preliminary program and construction cost as well as timeline estimates, accounting for variability in materials, labor, and external factors.
- **Tiebreaker: Small Local and Emerging Business (SLEB) Program Certification**
 - In case of a tie, a tiebreaking point will be awarded to firms that are certified by the County SLEB program or have experience working with local contractors and SLEB certified firms.
 - If a tie still exists, staff will evaluate proposals based on their potential for inclusion of tenant enriching amenities such as green space.

Application Submission Checklist

All applicants must include the following materials with their proposal submission, as well as the submittals required in Exhibit C:

1. Organizational Information
 - a. Cover Letter
 - i. (Briefly summarizing the proposal and identifying the primary contact person.)
 - b. Firm Profile and History
 - i. (Include organizational structure, size, years in business, and relevant expertise.)

- ii. If a joint venture, clearly describe partnership and roles and responsibilities
 - c. Business Documentation
 - i. Business license
 - ii. Articles of incorporation or equivalent documentation
 - iii. Proof of insurance coverage or ability to meet Alameda County's minimum insurance requirements
 - iv. Signed acknowledgment of acceptance of County terms and conditions (provided in RFQ appendix)
- 2. Qualifications and Experience
- 3. Project Team Resumes
- 4. (Key personnel and their relevant experience.)
- 5. Evidence of Past Successful Projects
 - a. Portfolio highlighting relevant residential project management and construction
 - b. Experience providing high-touch services for seniors and homeowners
 - c. Experience working with local governments to provide similar scope services
- 6. Letter(s) of Reference/References
 - a. Minimum of one reference letter from a developer, client, or public agency familiar with the firm's work.
 - i. Maximum of 3 letters can be provided.
 - b. Contact information for 3 references (can be the same as those which provided the letter)
- 7. Project Proposal
 - a. Narrative Project Description clearly outlining project approach and alignment with SHIFT objectives.
 - b. Cost estimates for services proposed broken down by phase and deliverable.
 - c. Proposed Project Timeline

Additional Materials

Any additional documentation or narratives that clearly support the proposal's alignment with SHIFT's goals, including innovative design features, sustainability measures, or community-oriented outcomes.

All materials must be submitted electronically via email by the deadline stated in the RFP.

Points will be awarded on a sliding scale. The County reserves the right to assign points in a range between the numerical points shown in this table. A threshold of 60 points will be necessary to be awarded a contract through this RFP.

Additional Points will be awarded based on the Alameda County Small Local and Emerging Business (SLEB) status as described in **Exhibit A** attached to this RFP.

Reviewers will individually score the project proposals and rate them on the degree to which they meet the respective evaluation rating and ranking criteria. The scores will then be averaged to come up with the final score for each proposal. The proposals which meet threshold

obligations and score at least 80 points will be eligible for an award, subject to funding availability, scoring relative to other proposals under consideration, and BoS approval.

List of Appendices

Appendix A — Alameda County Insurance Requirements

Appendix B — Submittal Addendum and Certifications

Appendix A – Alameda County Minimum Insurance Requirements

COUNTY OF ALAMEDA MINIMUM INSURANCE REQUIREMENTS

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
A	Marine General Liability (MGL) or Commercial General Liability with no waterborne exclusions Premises Liability; Products and Completed Operations; Contractual Liability; Personal Injury and Advertising Liability	\$1,000,000 per occurrence (CSL) Bodily Injury and Property Damage
B	Commercial or Business Automobile Liability All owned vehicles, hired or leased vehicles, non-owned, borrowed and permissive uses.	\$1,000,000 per occurrence (CSL) Any Auto Bodily Injury and Property Damage
C	Workers' Compensation (WC) and Employers Liability (EL) Required for all contractors with employees	WC: Statutory Limits EL: \$1,000,000 per accident for bodily injury or disease
D	Builder's Risk (Course of Construction) insurance utilizing an "All Risk" (Special Perils) coverage form or Installation Floater as applicable	Limits equal to the completed value of the project and no coinsurance penalty provisions.
E	Professional Liability If project involves design/build	\$1,000,000 per occurrence or claim \$2,000,000 policy aggregate
F	Contractors' Pollution Legal Liability and/or Asbestos Legal Liability and/or Errors and Omissions If project involves environmental hazards	\$1,000,000 per occurrence or claim \$2,000,000 policy aggregate

F**Endorsements and Conditions:**

1. **ADDITIONAL INSURED:** County of Alameda, its Board of Supervisors, the individual members thereof, and all County officers, agents, employees, volunteers, and representatives are to be covered as additional insureds on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of the Contractor including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to the Contractor's insurance (at least as broad as ISO Form CG 20 10 11 85 or if not available, through the addition of both CG 20 10, CG 20 26, CG 20 33, or CG 20 38; and CG 20 37 if a later edition is used). Auto policy shall contain or be endorsed to contain additional insured coverage for the County.
2. **DURATION OF COVERAGE:** All required insurance shall be maintained during the entire term of the Agreement. In addition, Insurance policies and coverage(s) written on a claims-made basis shall be maintained and evidence of insurance must be provided during the entire term of the Agreement and for at least five (5) years following the later of termination of the Agreement and acceptance of all work provided under the Agreement, with the retroactive date of said insurance (as may be applicable) concurrent with the commencement of activities pursuant to this Agreement. If coverage is cancelled or non-renewed, and not replaced with another claims-made policy form with a Retroactive Date prior to the contract effective date, the Contractor must purchase "extended reporting" coverage for a minimum of five (5) years after completion of work.
3. **REDUCTION OR LIMIT OF OBLIGATION:** All insurance policies, including excess and umbrella insurance policies, shall be primary and non-contributory coverage at least as broad as ISO CG 20 10 04 13 as respects the County, its officers, officials, employees, or volunteers. Any insurance or self-insurance maintained by the County, its officers, officials, employees, or volunteers shall be excess of the Contractor's insurance and shall not contribute with it. Pursuant to the provisions of this Agreement insurance effected or procured by the Contractor shall not reduce or limit Contractor's contractual obligation to indemnify and defend the Indemnified Parties.
4. **INSURER FINANCIAL RATING:** Insurance shall be maintained through an insurer with an A.M. Best Rating of no less than A: VII or equivalent, shall be admitted to the State of California unless otherwise acceptable by Risk Management, and with deductible amounts acceptable to the County. Acceptance of Contractor's insurance by County shall not relieve or decrease the liability of Contractor hereunder. Self-insured retentions must be declared and approved. Any deductible or self-insured retention amount or other similar obligation under the policies shall be the sole responsibility of the Contractor. The policy language shall provide or be endorsed to provide, that the self-insured retention may be satisfied by either the named insured or County.
5. **SUBCONTRACTORS:** Contractor shall include all subcontractors as an insured (covered party) under its policies or shall verify that the subcontractor, under its own policies and endorsements, has complied with the insurance requirements in this Agreement, including this Exhibit.
6. **JOINT VENTURES:** If Contractor is an association, partnership or other joint business venture, required insurance shall be provided by one of the following methods:
 - Separate insurance policies issued for each individual entity, with each entity included as a "Named Insured" (covered party), or at minimum named as an "Additional Insured" on the other's policies. Coverage shall be at least as broad as in the ISO Forms named above.
 - Joint insurance program with the association, partnership or other joint business venture included as a "Named Insured".
7. **CANCELLATION OF INSURANCE:** Each insurance policy required above shall provide that coverage shall not be cancelled, except with notice of cancellation provided to the County in accordance with policy terms and conditions.
8. **CERTIFICATE OF INSURANCE:** Before commencing operations under this Agreement, Contractor shall provide Certificate(s) of insurance and applicable insurance endorsements as set forth in the provisions of this Agreement and this Exhibit C, in forms satisfactory to County, evidencing that all required insurance coverage is in effect. However, failure to obtain the required documents prior to the work beginning shall not waive the Contractor's obligation to provide them. The County reserves the right to require the Contractor to provide complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time.

Appendix B — Submittal Addendum and Certifications

INSTRUCTIONS: Complete and submit all pages of this Exhibit C Submittal Addendum and Certifications electronically in PDF form, including Part A (Organization Information), Part B (Applicant Information and Acceptance), and Part C (Exceptions, Clarifications, Amendments).

- **AS DESCRIBED IN THE INSTRUCTIONS OF THE SUBMITTAL ADDENDUM SECTION OF THIS RFP, APPLICANTS ARE TO SUBMIT ONE (1) ELECTRONIC COPY OF THE SUBMITTAL IN PDF. NO PHYSICAL APPLICATION MATERIALS WILL BE ACCEPTED.**
- **ALL PAGES OF THIS SUBMITTAL ADDENDUM MUST BE SUBMITTED IN TOTAL WITH ALL REQUIRED DOCUMENTS AS PDFS; ALL INFORMATION REQUESTED MUST BE SUPPLIED; ANY PAGES (OR ITEMS THEREIN) NOT APPLICABLE TO THE APPLICANT MUST STILL BE SUBMITTED AS PART OF A COMPLETE APPLICATION RESPONSE, WITH SUCH PAGES OR ITEMS CLEARLY ANNOTATED “N/A”.**
- **APPLICANTS MUST QUOTE PRICE(S) AS SPECIFIED IN THE RFP, INCLUDING ANY ADDENDUMS. ALL PRICES AND NOTATIONS MUST BE PRINTED IN INK OR TYPEWRITTEN; NO ERASURES ARE PERMITTED; ERRORS MAY BE CROSSED OUT AND CORRECTIONS PRINTED IN INK OR TYPEWRITTEN ADJACENT, AND MUST BE INITIALED IN INK BY PERSON SIGNING SUBMITTAL. THESE DOCUMENTS MUST BE SUBMITTED ELECTRONICALLY ONLY.**
- **APPLICANTS THAT DO NOT COMPLY WITH THE REQUIREMENTS, AND/OR SUBMIT INCOMPLETE SUBMITTAL PACKAGES, SHALL BE SUBJECT TO DISQUALIFICATION AND THEIR SUBMITTALS REJECTED IN TOTAL.**
- **IF APPLICANTS ARE MAKING ANY CLARIFICATIONS AND/OR AMENDMENTS, OR TAKING EXCEPTION TO POLICIES OR SPECIFICATIONS OF THIS RFP, INCLUDING THOSE TO THE COUNTY’S SMALL, LOCAL, AND EMERGING BUSINESS PROGRAM (SLEB) POLICY, THESE MUST BE SUBMITTED IN THE EXCEPTIONS, CLARIFICATIONS, AMENDMENTS SECTION OF THIS SUBMITTAL ADDENDUM (PART C) IN ORDER FOR THE SUBMITTAL RESPONSE TO BE CONSIDERED COMPLETE.**
- **FOR ALL DOCUMENTS PREPARED AND SUBMITTED BY THE APPLICANT, THE COUNTY SUGGESTS USING 12-pt CALIBRI, ARIAL, OR TIMES NEW ROMAN FONT, WITH PAGE MARGINS OF AT LEAST ONE INCH**

PART A: ORGANIZATION INFORMATION

Official Name of Applicant:

Street Address Line 1:

Street Address Line 2: _____

City: _____ State: _____ Zip Code: _____

Webpage: _____

Type of Entity / Organizational Structure (check one):

Corporation

Joint Venture

Limited Liability Partnership

Limited Liability Corporation

Unincorporated Association

Other: _____

Jurisdiction of Organization Structure: _____

Date Organization was formed: _____

Federal Tax Identification Number: _____

Primary Contact Information:

Name / Title: _____

Telephone Number: _____ Fax Number: _____

E-mail Address: _____

SIGNATURE: _____

Name and Title of Authorized Signer: _____

Dated this _____ day of _____ 20_____

PART A1: ORGANIZATION #2 INFORMATION

Official Name of Applicant: _____

Street Address Line 1: _____

Street Address Line 2: _____

City: _____ State: _____ Zip Code: _____

Webpage: _____

Type of Entity / Organizational Structure (check one):

Corporation Joint Venture
Limited Liability Partnership
Limited Liability Corporation Unincorporated Association
Other: _____

Jurisdiction of Organization Structure: _____

Date Organization was formed: _____

Federal Tax Identification Number: _____

Primary Contact Information:

Name / Title: _____

Telephone Number: _____ Fax Number: _____

E-mail Address: _____

SIGNATURE: _____

Name and Title of Authorized Signer: _____

Dated this _____ day of _____ 20____

PART B: APPLICANT INFORMATION AND ACCEPTANCE

To: The County of Alameda

From: _____
(Official Name of Applicant)

1. The undersigned declares that the Application Documents, including, without limitation, the RFQ, Addenda, and Exhibits have been read.
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 Application Documents of this RFQ.
3. The undersigned has reviewed the Application Documents and fully understands the requirements in this Application process including, but not limited to, the requirements under the County Provisions, and that each Applicant who is awarded a contract shall be, in fact, a prime Contractor, not a subcontractor, to County, and agrees that its Submittal, if accepted by County, will be the basis for the Applicant to begin

forming a contract with County in accordance with the intent of the Application Documents.

4. The undersigned acknowledges receipt and acceptance of all addenda.
5. The undersigned agrees to the following terms, conditions, certifications, and requirements found on the County's website:

- **Debarment / Suspension Policy**

[<http://www.acgov.org/gsa/departments/purchasing/policy/debar.htm>]

- **Iran Contracting Act (ICA) of 2010**

[<http://www.acgov.org/gsa/departments/purchasing/policy/ica.htm>]

- **General Environmental Requirements**

[<http://www.acgov.org/gsa/departments/purchasing/policy/envIRON.htm>]

- **Small, Local & Emerging Business (SLEB) Program**

[<http://acgov.org/auditor/sleb/overview.htm>]

- **First Source**

[<http://acgov.org/auditor/sleb/sourceprogram.htm>]

- **Online Contract Compliance System**

[<http://acgov.org/auditor/sleb/relaton.htm>]

- **General Requirements**

[<http://www.acgov.org/gsa/departments/purchasing/policy/genreqs.htm>]

- **Proprietary and Confidential Information**

[<http://www.acgov.org/gsa/departments/purchasing/policy/proprietary.htm>]

6. The undersigned acknowledges that Applicant will be 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 RFQ and associated Application Documents.

7. It is the responsibility of each Applicant to be familiar with all of the specifications, terms and conditions and, if applicable, the site condition. By the submission of a Submittal, the Applicant certifies that if awarded a contract they will make no claim against the County based upon ignorance of conditions or misunderstanding of the specifications.

8. Patent indemnity: Vendors who do business with the County shall hold the County of Alameda, its officers, agents and employees, harmless from liability of an nature or kind, including cost and expenses, for infringement or use of any patent, copyright or other proprietary right, secret process, patented or unpatented invention, article or appliance furnished or used in connection with the contract or purchase order.

9. **Insurance certificates are not required at the time of submission.** However, by signing this Addendum and Certification, the Contractor agrees to meet the minimum insurance requirements stated in the RFQ or make clear in Part C what exceptions they will be seeking. The undersigned acknowledges **ONE** of the following (please check only one box):

Applicant is not local to Alameda County and is ineligible for any preference; **OR**
Applicant is a certified Small, Local and Emerging Business (SLEB) under the Alameda County SLEB Program and is requesting a 10% preference; provide your SLEB Certification Number and expiration date; **OR**

Applicant is LOCAL to Alameda County, is submitting documentation to determine its SLEB status, and is requesting a 5% preference, and has attached the following documentation to this Submittal Addendum and Certifications:

- Copy of a verifiable business license, issued by the County of Alameda or a City within the County; and
- Proof of six (6) months business residency, identifying the name of the Applicant and the local address. Utility bills, deed of trusts or lease agreements etc., are acceptable verification documents to prove business residency.

10. The undersigned hereby certifies the following statements:

- 1. That no elected or appointed official or employee of the County is financially interested, directly or indirectly, in the performance of the services specified in the RFP;*
- 2. That the information included in the Submittal is true and correct to the best of its knowledge; and*
- 3. That the person signing the RFQ cover letter/transmittal letter is authorized to submit this application on behalf of the Applicant.*

SIGNATURE: _____

Name and Title of Authorized Signer: _____

Dated this _____ day of _____ 20____

PART C: EXCEPTIONS, CLARIFICATIONS, AMENDMENTS

Applicant Name: _____

Instructions: List below requests for clarifications, exceptions and amendments, if any, to the RFQ and associated Application Documents, including insurance requirements and submit with your Application. The County is under no obligation to accept any exceptions and such exceptions may be a basis for application disqualification.

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

*Print additional pages as necessary