

September 25, 2017



City of Rialto
John Dutrey, Project Manager
Development Services Department
150 S. Palm Avenue
Rialto, CA 92376

**Subject: Proposal for Administrative Consulting Services for
Home Sweet Home Repair and Mobile Home Repair Programs**

Dear Mr. Dutrey:

LDM Associates, Inc. (LDM) is pleased to submit its qualifications to provide and/or assist in the administration and implementation of the City's Home Sweet Home Repair and Mobile Home Repair Programs. LDM, along with its affiliate MDG Associates, Inc. (MDG), have been providing high-quality services to municipal agencies, the U.S. Department of Housing and Urban Development (HUD), and private clients for over 30 years.

LDM's emphasis and capabilities are in the grants management of HUD funded Community Planning and Development (CPD) Programs such as Community Development Block Grant (CDBG), HOME Investment Partnerships (HOME) and Emergency Solutions Grant (ESG) in addition to one-time entitlement grants such as the Neighborhood Stabilization Programs (NSP 1, 2 & 3) and the Homelessness Prevention and Rapid Re-Housing Program (HPRP). The firm provides administration and/or implementation services for programs such as housing rehabilitation, first time homebuyer and labor compliance (both State and Federal).

Our consulting team is comprised of highly qualified professional staff with expertise in all aspects of housing rehabilitation administration and implementation. Provided herewith, is the information requested in your Request for Proposals (RFP).

If you have any questions regarding this matter, please do not hesitate to contact me.

Respectfully Submitted,

A handwritten signature in black ink, appearing to read "Rudy E. Muñoz", is written over a horizontal line.

Rudy E. Muñoz
Senior Vice-President

Enclosure: Proposal



City of Rialto

PROPOSAL

Administration and Implementation of Home Sweet Home Repair and Mobile Home Repair Programs

September 25, 2017

**Corporate Headquarters
10722 Arrow Route, Suite 822
Rancho Cucamonga, CA 91730**

Telephone ■ (909) 476-6006
Fax ■ (909) 476-6086

CITY OF RIALTO
PROPOSAL
ADMINISTRATIVE CONSULTING SERVICES FOR
HOME SWEET HOME REPAIR AND MOBILE HOME REPAIR PROGRAMS

TABLE OF CONTENTS

Section I.

Description of Firm, Qualifications, and Experience	1
---	---

Section II.

Project Approach/Methodology and Scope of Work	4
--	---

Section III.

References	8
------------------	---

Section IV.

Budget and Schedule of Hourly Billing Rates	10
---	----

Resumes of Key Personnel

Organizational Chart

SECTION I. DESCRIPTION OF FIRM, QUALIFICATIONS, AND EXPERIENCE

LDM Associates, Inc. (LDM) was established in 1987 and has undergone steady growth since its inception. LDM is a corporation registered in the State of California. In response to our clients' needs, LDM and its affiliate MDG Associates, Inc. (MDG) provide a wide variety of Community Development consulting services including, but not limited to Grants Management, Project Management, Urban Planning, and Labor Compliance Monitoring.

LDM Associates, Inc. is comprised of individuals with a wide variety of expertise that address the services specifically requested by the City. Currently, LDM has twenty-eight (28) staff members. Thirteen (10) of the staff members are knowledgeable and experienced in the administration of Housing Rehabilitation Programs.

LDM provides administrative and management services to cities that are seeking a consultant that can act as an extension of their staff and look after the best interest of the City.

Grants Management

LDM provides administration and implementation services for the Community Development Block Grant (CDBG), HOME Investment Partnerships (HOME), Emergency Solutions Grant (ESG), Community Development Block Grant Recovery (CDBG-R) programs, as well as the Homelessness Prevention and Rapid Rehousing Program (HPRP), CalHome, and Neighborhood Stabilization Programs (NSP). In addition, LDM implements activities funded under the aforementioned programs such as Residential Rehabilitation, Commercial Rehabilitation, First-Time Homebuyer, Capital Improvement Project Management, and Labor Compliance Monitoring and Enforcement.

LDM staff maintains an excellent relationship with the local HUD office as well as at the headquarters level (Washington D.C.). LDM staff currently provides technical assistance (TA) to grantees throughout the country on behalf of HUD Headquarters through the OneCPD and Community Compass Programs. This technical assistance is provided to states, counties, cities and other HUD funded grantees in conjunction with the CDBG, HOME, and NSP programs. In addition, LDM staff has been providing assistance to grantees through the HUD Resource Exchange Ask a Question (AAQ) program in the areas of CDBG, HOME, Environmental Review, IDIS, and DRGR.

LDM and MDG are currently under contract with 22 cities and one (1) County for HUD funded activities totaling approximately \$28.5 million dollars. The Cities include: Apple Valley, Albuquerque (NM), Azusa, Claremont, Compton, Corona, Duarte, Fontana, Hawthorne, Hemet, Hesperia, Irvine, Lawndale, Newport Beach, Paramount, Palmdale, Rialto, Rancho Palos Verdes, Salinas, Tacoma (WA), Temecula, Upland, and Walnut to administer or assist in the administration of CDBG, HOME and/or ESG Programs. Twelve (16) of these cities are HUD entitlement cities and six (6) are participating cities under the Los Angeles County Community Development Commission. In addition, MDG and LDM provide services to the cities of Baldwin Park and Riverside as well as the County of Santa Barbara on specific tasks such as IDIS input, project monitoring, federal labor standards (Davis-Bacon) compliance, monitoring CDBG/HOME and ESG grants, preparation of the Consolidated Plan/Action Plan, and the preparation of the Consolidated Annual Performance and Evaluation Report (CAPER).

Our staff is knowledgeable in a number of computer programs including all of the Microsoft Office software, Microsoft Project, Adobe programs and AutoCAD. Our staff is fully trained in the use of all required Federal, State and local online reporting databases, including but not limited to the Integrated Disbursement and Information System (IDIS), Disaster Recovery Grant Reporting System (DRGR), Homeless Management Information System (HMIS), Recovery Act Management and Performance System (RAMPS), Performance and Accountability for Grants in Energy System (PAGE), HEROS (Environmental Review Module), and FederalReporting.gov.

Housing Rehabilitation

LDM along with its affiliate MDG are currently under contract with the Cities of Claremont, Carson, Fontana, Hawthorne, Hesperia, Irvine, Lawndale, La Cañada Flintridge, Monrovia, Palmdale, Paramount, Upland, Walnut and Whittier for the management and implementation of their housing rehabilitation programs or inspection services for their programs. Last year, the firm processed and completed the rehabilitation of approximately 185 residential dwellings for 14 different cities. This includes the use of CDBG funds, HOME funds, State HOME funds and CalHome funds.

Section 3

Our staff is experienced in the implementation of the Section 3 employment, contracting and training requirements. Currently, LDM, along with its affiliate MDG, monitors labor compliance activities on 15 projects with a combined construction value of over \$12.5 million. Of these projects, ten (10) are Section 3-covered projects with contracts in excess of \$100,000.

Labor Compliance (Davis-Bacon Act)

We are currently under contract to provide Labor Compliance services to the cities of Azusa, Compton, Corona, Duarte, Fontana, Irvine, Lawndale, Newport Beach, Paramount, Redlands, Rialto, Torrance, Walnut and Upland. Our typical scope of work includes preparation and review of bid documents for compliance with Federal labor standards and requirements including Davis-Bacon and Related Acts, Section 3, and DOL regulations, attend pre-construction meeting and present information on Davis-Bacon and Section 3 requirements, review submitted bid documents for compliance, establish and maintain contractor and subcontractor labor files, conduct employee field interviews and document posting compliance, reconcile weekly certified payroll reports and supporting documentation, monitor contractors for Section 3 accomplishments, compile and submit labor standards and related reports to the funding jurisdiction, schedule labor compliance file reviews prior to release of retention funds, and address and resolve any underpayment or deficiency issues.

SECTION II. PROJECT APPROACH/METHODOLOGY AND SCOPE OF WORK

PROJECT APPROACH

LDM proposes to provide service on-site and at its corporate office as required by the City. We anticipate becoming an extension of City staff and would provide flexible scheduling which meets the needs of the City. In addition, we would make ourselves available to attend City Council meetings as requested by staff. We will make ourselves available during non-scheduled hours should the need arise, by providing staff with our cell phone numbers.

CONSULTANT TEAM

The members of our consulting group proposed to provide direct housing rehabilitation program services include Rudy E. Muñoz, Senior Vice-President and Juan Rios, Manager. Additional staff may be assigned on an as needed basis. Mr. Muñoz is the authorized signatory for contracts on behalf of LDM Associates and oversees the assigned consulting team for all contracts. Mr. Rios will be the City's direct contact and will manage all aspects of the delivery of consulting services to the City, including the Home Sweet Home and Mobile Home Repair programs to ensure compliance with State and Federal Requirements Additional staff will assist Mr. Rios as needed.

Rudy Muñoz, Senior Vice-President - Mr. Rudy Muñoz is the Senior Vice-President of LDM Associates, Inc. which has been providing community development consulting services to municipal agencies since 1987. With more than 32 years of experience in the community development field, including grants management of federal, county, and local grants including those offered by the U.S. Department of Housing and Urban Development, Mr. Munoz assists municipalities with all aspects of Community Development Block Grant (CDBG), HOME Investment Partnerships Act (HOME), Neighborhood Stabilization Program (NSP) and Emergency Solutions Grant (ESG) management.

Mr. Munoz focuses on strategic community investment, development of implementation tools to facilitate the management of programs, developing tools and conducting training for HUD individual and multiple grantees and in the development of Policies and Procedures for programs (HOME, CDBG, NSP) and activities funded under these programs (Housing Rehabilitation, Commercial Rehabilitation and Homebuyer Programs). His work in these areas includes 36 Consolidated Plans, over 200 Action Plans and CAPERs, and 12 Analysis of Impediments to Fair Housing Choice. Mr. Muñoz was recently selected through HUD's Technical Assistance Program to provide Disaster Recovery Grant Reporting (DRGR) and CPD Monitoring training to the Commonwealth of Puerto Rico in Spanish. Mr. Muñoz is a Certified HOME Specialist (Regulations) and is a national technical assistance provider through HUD's OneCPD initiative.

Juan C. Rios, Manager - Juan C. Rios joined LDM Associates in 1993 and is responsible for the day-to-day administration of the construction division of the company to include all rehabilitation programs. Mr. Rios' role for the company includes providing project and construction management functions to government agencies for capital improvement projects funded with State or Federal funds. This includes managing improvements to residential properties under the various housing rehabilitation programs as well as a variety of public facilities. His duties also include coordinating with architects, engineers, applicants and City staff to assure that projects are implemented in accordance with applicable regulations. Mr. Rios is bilingual/bi-literate in English and Spanish and is a Certified Building Inspector. Mr. Rios received a Bachelor of Science Architecture from the Universidad ITESO, Guadalajara, Mexico; AutoCAD Certification from Mt. San Antonio College, Walnut, CA; Construction Estimating Certification, Mt. San Antonio College, Walnut, CA.

SCOPE OF SERVICES

LDM proposes to provide staffing and other resources required to provide technical assistance for the administration and implementation of the City's CDBG and HOME projects and programs. Those duties include:

General Program Services

A. Program coordination with Project Manager in Development Services Department, or other City designee. Tasks will include but not limited to:

- **Program Marketing:** Market the program to Rialto residents through a variety of methods including, but not limited to, advertisements in the local newspaper, City quarterly mailer, and the City's website; distribution of program flyers at various City public facilities and other locations; Notices in the City's cable channel.
- **Intake/assessment of eligibility (review applications):** Contractor will make initial eligibility determination of applicants based on established City program eligibility criteria and U.S. Department of Housing and Urban Development (HUD) income guidelines and the apparent need for rehabilitation measures to correct relevant housing code or Housing Quality Standard (HQS) deficiencies.
- **Property Inspection:** Inspections will take place a minimum of three (3) separate times during the rehabilitation process. Contractor will perform site visits to ascertain that approved and contracted/applicable rehabilitation work is proceeding properly and satisfactorily, will authorize (with the homeowner's written approval, including signature and date) appropriate change orders, and will mediate in the event of owner dissatisfaction with the work done by the subcontractor. The initial property inspection takes place following Consultant's determination of applicant and property eligibility to determine rehabilitation needs for the purpose of the funding recommendation, environmental review and whether or not hazardous materials testing will be necessary.
Subsequent inspections take place during the construction phase to verify compliance with contract specifications in order to validate the release of funds from escrow to the contractor. Contractor and the owner will conduct the final inspection upon completion of all work items.

- **Work write-ups:** For each eligible unit to be assisted, Contractor will complete a detailed Work Description and Bid Proposal that details the rehabilitation work to be performed, including estimated costs of each activity, materials to be used, and industry or regulatory standards to be met. This write-up will be signed and dated by the Contractor and homeowner.
- **Solicitation and selection of construction contractors:** Contractor will assist approved homeowners in the identification, proper solicitation, and selection of subcontractors qualified to perform the authorized rehabilitation of eligible housing units in accordance with the requirements of the Community Development Block Grant and CalHOME programs. Contractor will review work orders/contracts/agreements that homeowners will sign in contracting with subcontractors, and Contractor will assist homeowners in ensuring the description of the work contained in any contracts/agreements/work orders with subcontractors is as accurate as possible.
- **Loan underwriting:** Contractor will order Policy of Insurance of Record Title (PIRT) Policy or State mobile home title reports from the State Department of Housing and Community Development (as applicable) as well as property appraisals to determine the estimated post-rehabilitation value on units to be assisted with CalHOME funds. Contractor will also prepare Loan Review Committee (LRC) Report and LRC Agenda & Determination Form as well as schedule and conduct LRC meetings.
- **Loan document execution:** The Contractor shall facilitate the execution of loan documents by the owner and Housing Manager at City offices or at the unit to be assisted. In addition, Contractor shall prepare construction contract and escrow account control instructions; arrange for the City to fund the escrow account, and submit Deed of Trust and Request for Notice to title company for recordation following the three (3)-business day cancellation period.
- **Submittal of invoices to City Staff for Approval of construction contractor payments:** As rehabilitation progresses and as invoices are submitted by contractors, Contractor will verify that the expenses are reasonable, and the work has been completed properly (including sign-off the owner), and will submit to City the applicable form(s) executed by Contractor and property owner indicating that the work has been completed and it is satisfactory. This will be City's verification of Contractor approval of subcontractor payment(s) for final City staff approval. Major tasks will require approval from the City before the Contractor can proceed with work prior to signing a subcontractor contract.
- **Coordinate with City Staff on invoices,** general administrative issues.
- **Provide public information** at the direction of the City.
- **Provide the City monthly status reports.**
- **Maintenance of case files and other records:** For each application, Contractor will maintain case files, including but not limited to application and documentation of eligibility, work write-ups, subcontractor selection criteria, copy of contract/agreement/work order between owner and

subcontractor(s), documents on all necessary licenses and permits, site visit/inspection reports (including final inspection), change orders as applicable, and subcontractor invoices for payment (with owner-signed-off). Contractor will also maintain appropriate information on persons residing in the property, including a list or lists identifying persons in the home immediately before the rehabilitation, after rehabilitation completion, and those moving in during rehabilitation (per 24 CFR 570.606 and 24 CFR part 24). Contractor will maintain these and other program and financial records in accordance with CDBG record keeping requirements as specified in the Agreement.

B. Coordination with CDBG and CalHome Administration processing of subcontractor invoices. Task will include but not limited to:

- Monthly monitoring.
- Prepare Environmental Review and Assessment.
- Prepare/submit request for release of funds and certification.

SECTION III. REFERENCES

The following list represents a portion of our current client list for which we provide similar services.

City of Irvine - Mr. Steve Holtz, Housing Administrator

Services Provided: CDBG/HOME/CDBG-R/HPRP Program Administration and Technical Assistance; Redevelopment Consultation; CDBG funded Housing Rehabilitation Program Implementation; Analysis of Impediments to Fair Housing (AI); Five-Year Consolidated Plan/Action Plan/CAPER preparation; Davis-Bacon and Section 3 Compliance.

Date of Contract: 2001 to Present

Phone Number: (949) 724-7452; email address: sholtz@ci.irvine.ca.us

City of Palmdale - Mike Miller, Director of Neighborhood Services

Services Provided: CDBG/HOME/CDBG-R/NSP Program Administration and Technical Assistance; Redevelopment Consultation; Analysis of Impediments to Fair Housing (AI); Consolidated Plan/Action Plan/CAPER preparation; Davis-Bacon and Section 3 Compliance; affordable housing monitoring.

Date of Contract: 2000 to Present

Phone Number: (661) 267-5126; email address: MikeM@cityofpalmdale.org

City of Paramount – Karina Lam Liu, Finance Director

Services Provided: CDBG/CDBG-R/NSP/HOME Program Administration; Redevelopment Consultation; CDBG and HOME funded Housing Rehabilitation and Commercial Rehabilitation Program Implementation; Homebuyer Assistance Program; Analysis of Impediments to Fair Housing (AI); Consolidated Plan/Action Plan/CAPER preparation; 5 Year Implementation Plan (Redevelopment); Davis-Bacon Compliance; and affordable housing monitoring.

Dates of Contract: 2003 to Present

Phone Number: (562) 220-2210; email address: Klam@ParamountCity.com

City of Upland – Jeff Zwack, Director of Development Services

Services Provided: CDBG Program Technical Assistance; CalHome and RDA funded Housing Rehabilitation Program Implementation (4 separate programs); RDA funded Commercial Rehabilitation Program Implementation; CalHome and RDA funded Homebuyer Assistance Program; Project/Construction Management; Davis-Bacon and Section 3 Compliance; Planning Services; Analysis of Impediments to Fair Housing (AI); Consolidated Plan/Action Plan/CAPER preparation; affordable housing monitoring.

Date of Contract: 2004 to Present

Phone Number: (909) 931-4148; email address: jzwack@ci.upland.ca.us

City of Hawthorne - Mari Guerrero, CDBG/HOME Coordinator

Services Provided: CDBG/HOME Program Administration and Technical Assistance; CDBG and HOME

funded Housing Rehabilitation Program Implementation; RDA funded Commercial Rehabilitation Program Implementation; Analysis of Impediments to Fair Housing (AI); Consolidated Plan/Action Plan/CAPER preparation.

Date of Contract: 2002 to 2010 and 2014 to Present

Phone Number: (310) 349-2976; email address: mguerrero@cityofhawthorne.org

City of Corona - Cynthia Lara, Administrative Services Manager

Services Provided: CDBG Program Administration and HOME Technical Assistance including all aspects of the CDBG Program as well as assistance with affordable housing projects and Davis-Bacon Compliance Monitoring.

Date of Contract: 2010 to Present

Phone Number: (951) 739-4963; email address: Cynthia.Lara@ci.corona.ca.us

City of Fontana - David Edgar, Deputy City Manager

Services Provided: CDBG/HOME/CDBG-R/NSP Program TA; Analysis of Impediments to Fair Housing (AI); Consolidated Plan/Action Plan/CAPER preparation; Davis-Bacon/Section 3 Compliance; Policies and Procedures for FTHB and Housing Rehabilitation Programs

Date of Contract: 2009 to Present

Contact Person: Phone Number: (909) 350-6739; email address: dedgar@fontana.org

City of Newport Beach - James Campbell, Principal Planner

Services Provided: CDBG Program Technical Assistance; Davis-Bacon and Section 3 Compliance; Analysis of Impediments to Fair Housing (AI); Consolidated Plan/Action Plan/CAPER preparation; affordable housing monitoring.

Date of Contract: 2000 to Present

Phone Number: (949) 644-3210; email address: jcampbell@newportbeachca.gov

SECTION IV. BUDGET AND SCHEDULE OF HOURLY BILLING RATES

BUDGET PROPOSAL

LDM proposes to perform the Scope of Services on an hourly basis, billed in quarter-hour increments based on the billing rates listed on the attached Rate Schedule (See Exhibit "A") that are effective July 1, 2017.

CONFLICT OF INTEREST

LDM Associates, Inc. is not aware of any possible conflict of interest that might limit the projects on which our firm could work.

STATEMENT

This proposal as submitted is valid for a period of 90 days from the date of submittal.

LDM Associates, Inc.

EXHIBIT "A"

LDM Associates, Inc.

SCHEDULE OF HOURLY BILLING RATES

Rates effective as of July 1, 2017

Staff Person	Hourly Rate
President	\$110.00/Hr.
Senior Vice-President	\$105.00/Hr.
Vice President	\$100.00/Hr.
Manager	\$95.00/Hr.
Senior Associate	\$85.00/Hr.
Associate	\$75.00/Hr.
Senior Project Assistant	\$65.00/Hr.
Project Assistant	\$55.00/Hr.
Secretary	\$35.00/Hr.

Note: If LDM staff is requested by the City to attend a meeting not considered a part of this proposal or on a day in which a consultant is not scheduled to be on site, the City shall be billed for the time it takes to drive to and from the City and its corporate office.

REIMBURSABLE ITEMS

Project Supplies	At Cost plus 10% surcharge (when applicable)
Prints/Reproductions	At Cost plus 10% surcharge (when applicable)
Postage and Delivery	At Cost plus 10% surcharge (when applicable)
