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Approve Scope of Work for 2013 HOME Investment Partnership (HOME) Grant-Funded Owner-Occupied Residential Rehabilitation Program Operator Services

In December 2013, the City was awarded a HOME Investment Partnerships (HOME) grant to implement an Owner Occupied Residential Rehabilitation Program, and the grant agreement was executed in late June 2014. The grant award includes General Administration funds of up to \$12,500 (2.5% of grant funds), Activity Delivery funds of up to \$117,000 (24% of grant funds) for program operation and pre-loan costs, and up to \$370,500 for rehabilitation loans. The City has not previously operated a HOME rehabilitation program, and assistance is needed to set up and launch the program and to train staff so that most, if not all, activities may be accomplished in-house. HOME requires a competitive Request for Proposal (RFP) process to procure program assistance. The proposed scope of work proposed for the City's RFP is as follows:

A. Program Training: HOME Owner Occupied Residential Rehabilitation Program

1. Provide new or review existing program guidelines, forms, agreements, and other required program documents for compliance with HOME standards and regulations.
2. Review and advise City staff regarding program outreach, networking, and marketing.
3. Provide sample forms or review standard forms and provide training regarding administrative procedures and documentation, inspections and work write-ups, homeowner/contractor contracts, labor standards, relocation assistance, and other required program and project documentation.
4. Assist City staff as requested or necessary in training of a Project Inspector.

B. Rehabilitation Pre-Loan, Loan, and Construction Procedures:

1. Assist, advise and provide training regarding pre-loan procedures and tasks including appraisals, lead based paint testing, termite reports, insurance, and any other pre-loan procedures and tasks that may be required or recommended per HOME guidelines and regulations.
2. Process and compile loan packages and associated documentation; analyze, recommend, and present loans to staff and Loan Committee; and monitor loan compliance per HOME requirements, until or unless any such duties are assigned to City Staff.
3. Review and provide assistance and training for individual loan and construction file set-ups, work write

ups, contracts, and other pre-loan, loan and construction documentation, processes and tasks to ensure compliance with HOME program regulations and standards.

C. Other Program Tasks

1. Provide staff training in preparation of all required HOME reports including set-up reports, drawdown requests, progress reports, and other required reports.
2. Coordinate with City Staff to ensure the timely submittal of all reports and cash requests associated with the program.
3. After termination of City contract, ensure orderly transition of Program files, including status of follow-up items.
4. Prepare for and attend all grant monitoring visits.