

*Fulton County, GA*

# **Scope of Services and Fees for Providing Technical Assistance related to HUD Community Planning & Development Programs**

September, 2024



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# Scope of Work

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M&L is prepared to provide Fulton County, GA assistance with the preparation of various documents and technical assistance related to the County's HUD CPD programs through December of 2025. These services would include the completion of the FY 2025-2029 Consolidated Plan and FY 2025 Annual Action Plan, the development and preparation of the County's FY 2026 Annual Action Plan, the preparation of the Consolidated Annual Performance and Evaluation Report (CAPER) for Program Year 2024, and implementation services, HOME ARP technical services related to any needed RFPs assistance with implementation and TBRA RFP development, and on-going technical assistance related to the administration and implementation of the County's Community Development Block Grant (CDBG), HOME, ESG, HOME ARP NSP Programs.

We will also provide services, as needed, related to the NSP close-out, HOME match technical services and HOP loan underwriting and reviews.

## **A. Completion of the FY 2025-2029 Five Year Consolidated Plan and FY 2025 Annual Action Plan**

In 2024, M&L began working on the County's FY 2025-2029 Five Year Consolidated Plan and Annual Action Plan for FY 2025. Between January-March of 2025, M&L will finalize these documents for submission to HUD in IDIS. These documents will meet all of the current HUD regulatory requirements.

## **B. Preparation of Annual Action Plan for FY 2026**

M&L will prepare the County's FY 2026 Annual Action Plan for its CDBG, HOME and ESG programs. The Annual Action Plan will list the specific actions, activities, and programs the County will undertake during Program Year 2026 to address the priority needs. The County's Annual Action Plan will be prepared by M&L in the HUD required eCon Planning suite for IDIS, in accordance with all required HUD elements and specifically include the following items:


- Citizen Participation
- Inclusion of all Financial Resources
- Annual Objectives
- Description of Activities including:
  - Development of performance measures and outcomes
  - Annual Affordable Housing Goals
  - Public Housing
  - Homeless and Special Needs
  - Barriers to Affordable Housing
  - Program Specific Requirements
  - Maps
  - Tables

A more detailed Scope of Services follows:

1. Standard Form 424



2. A description of the activities the County will undertake during the coming year to address the priority needs and local objectives identified. These activities will be determined through consultation with County officials. This description will identify the local objectives that will be addressed by the activities that are expected to be undertaken using formula grant funds, other HUD assistance, non-HUD sources of funds, and program income which the County expects to receive during the program year. This information will be presented in the table prescribed by HUD.
3. Activities the County will undertake during the next year to address emergency shelter and transitional housing needs of homeless individuals and families, to prevent low income individuals and families with children from becoming homeless, and to help homeless persons make the transition to permanent housing and independent living; the nature and extent of anti-homelessness activities to be undertaken in the County will be determined through consultation with County officials, and will be based on the extent of need and the availability of resources.
4. Actions the County plans to take during the next year to foster and maintain affordable housing, fair housing, public housing improvements and resident initiatives; remove barriers to affordable housing, evaluate and reduce lead-based paint hazards, reduce the number of households with incomes below the poverty line, develop institutional structure, address obstacles to meeting underserved needs, and enhance coordination between public and private housing and social service agencies. This action plan will be drawn from the conclusions and recommendations reached in the County's most recent Analysis of Impediments to Fair Housing.
5. The Action Plan will include the following elements:
  - AP-15 Expected Resources
  - AP-20 Annual Goals and Objectives
  - AP-35 Projects
  - AP-50 Geographic Distribution
  - AP-55 Affordable Housing
  - AP-60 Public Housing
  - AP-65 Homeless and Other Special Needs Activities
  - AP-75 Barriers to Affordable Housing
  - AP-85 Other Actions
  - AP-90 Program Specific Requirements
6. Certifications - The Consolidated Plan will contain the certifications required by HUD.
7. Monitoring - The Consolidated Plan will describe the standards and procedures which the County will use to monitor activities to be carried out in furtherance of the Consolidated Plan. The County may continue to make use of subrecipient organizations to carry out certain portions or all of the community's CDBG Program. Mullin & Lonergan will recommend applicable subrecipient monitoring



techniques and standards. These standards and procedures will ensure long-term compliance with requirements of the programs involved.

### **C. Consolidated Annual Performance Evaluation Report (CAPER) for FY 2024**

M&L will prepare the County's CAPER for the Program Year 2024, complying with the HUD format, and will report through narratives, tables and maps:

- Tables
- Activity accomplishments
- People served
- Assessment of 5 year goals and objectives
- Affirmatively furthering Fair Housing
- Leveraging resources
- Citizen comments
- Financial Reports
- ESG Program CAPER
- All other components required by HUD

The CAPER will include the elements below and be prepared using the IDIS template as required by HUD and include the following elements.

1. Prepare a summary assessment of how activities undertaken during the previous year address the objectives identified in the County's Consolidated Plan.
2. Identify actions taken during the previous year to affirmatively further fair housing.
3. Prepare a summary evaluation of progress made in meeting specific objectives to provide affordable housing, including the number of low and moderate income renter and owner households that were assisted during the previous year and the number of households assisted with housing that meets the Section 215 definition of affordable housing. This evaluation will include a comparison of actual accomplishments versus proposed goals, efforts to address "worst case needs", and the needs of persons with disabilities.
4. Prepare a summary of actions taken during the previous year to implement a Continuum of Care strategy for the homeless, near homeless, and the special needs of persons who are homeless but require supportive housing.
5. Identify and prepare a summary evaluation of actions taken during the previous year that address obstacles to meeting underserved needs, foster and maintain affordable housing, eliminate barriers to affordable housing, overcome gaps in institutional structures and enhance coordination, improve public housing and resident initiatives, evaluate and reduce lead-based paint hazards, ensure compliance with program and comprehensive planning requirements, and reduce the number of persons living below the poverty level.



6. Describe progress made during the previous year toward leveraging public and private funds that address the needs identified in the action plan, including how many matching requirements were satisfied.
7. Prepare a summary of citizen comments received during the previous year concerning the CDBG/HOME/ESG programs.
8. Prepare an evaluation of how well the County's CDBG/HOME/ESG activities undertaken in the previous year addressed the priority needs and objectives in the Five Year Consolidated Plan and the Annual Action Plan. Identify adjustments and improvements that need to be made to the County's strategies in order to better meet the CDBG, HOME and ESG Program goals of providing decent housing, a suitable living environment, and expanding economic opportunities for low and moderate income persons.
9. Prepare an assessment of the relationship of the use of CDBG and HOME funds to the priorities, needs, goals, and specific objectives identified in the Five Year Consolidated Plan, including an analysis of the extent to which CDBG and HOME funds were distributed among different categories of housing needs.
10. Describe the nature of and reasons for any changes in CDBG program objectives and indications as to how the County will change its program based on program history.
11. Prepare an analysis that shows that, in the previous year, the County pursued all resources that it said it would pursue, provided certifications for consistency as pledged, and did not hinder implementation of the Five Year Consolidated Plan.
12. If applicable, prepare an explanation for why the County did not use CDBG funds exclusively for the three national objectives, or did not comply with the overall benefit certification.
13. If any activities undertaken during the previous year involved acquisition, rehabilitation, or demolition of occupied real property, prepare a narrative that describes the steps taken to minimize displacement, the steps taken to identify displacement that is subject to the provisions of the Uniform Relocation Act or Section 104 (d) of the 1974 Community Development Act and how such provisions were implemented, and the steps taken to ensure the timely issuance of information notices to displaced parties.

The CAPER for each year will also include the following:

CR-05	Goals and Outcomes
CR-10	Racial and Ethnic Composition of Families Assisted
CR-15	Resources and Investments
CR-20	Affordable Housing
CR-25	Homeless and Other Special Needs



CR-30	Public Housing
CR-35	Other Actions
CR-40	Monitoring
CR-45	CDBG and HOME

Additionally, all HOME and ESG required reports will be included in the eCon Planning Suite for IDIS as necessary.

**D. HOME and HOME ARP Technical Services**

M&L will provide various HOME ARP technical services to the County. This work would include such items such as the HOME ARP Policy and Procedures Manual, assistance with implementation and staff training, assistance with the preparation of HOME ARP Allocation Plan substantial amendments, drafting HOME ARP RFPs including one for TBRA and other related items.

HOME Program technical assistance may include such items as IDIS clean-up, drafting agreements, assistance with HOME match documentation, assistance with the development of RFPs and guidelines for multifamily rental housing development, on-going program compliance assistance and related technical assistance.

M&L will also assist the County with the HOME underwriting and loan reviews for the County's HOP Program.

**E. Technical Advisement Services**

M&L will also provide as needed additional professional consulting and advisory services to the County, including technical support for the community development concerns with respect to the County's federal programs during the contract period. Federal programs include but are not limited to the Community Development Block Grant Program (CDBG), the HOME Investment Partnerships Program (HOME), HOME ARP Program, and the Neighborhood Stabilization Program (NSP).

M&L will provide the county with technical advice and assistance in developing policy planning and management capacity and to carry out management coordination and monitoring of activities necessary for effective planning and implementation of the Community Development Block Grant Program, the HOME Program, NSP Program and the HOME ARP program.

M&L agrees to render technical advice and assistance through email, telephone communication, video conference calls and written responses to the County and provide assistance relative to matters the following:

- Assistance in providing services related to the NSP close out requirements, program amendments to allow for other eligible redevelopment projects under the NSP program and other related technical services.



- Requested staff training related to the federal CDBG, HOME and HOME ARP programs.
- Assist the County in clarifying questions on eligible activities through research of HUD policy memos, preparation of written requests for HUD determination, and other assistance.
- Assist the County with performing annual desktop HOME monitoring of various HOME assisted projects currently in the HOME period of affordability. This will be completed per HUD requirements and the County's HOME Monitoring Plan.
- Provide guidance and direction to the County on compliance with any new HUD regulations and memos periodically issued during the program year.
- Requirements of the various laws, regulations, circulars, handbooks, etc., pertaining to nondiscrimination, relocation and acquisition, and labor standards.
- Requirements for Equal Opportunity Documentation
- Assistance with fair housing compliance to affirmatively further fair housing
- Assist the County in preparing Substantial amendments
- Assist the County with IDIS activity set up and completion and other aspects of IDIS as necessary.
- Other similar requests by the County for advice under these federal programs.





# Fee Schedule

M&L is suggesting a combination lump sum and hourly rate fee schedule which is a not to exceed amount of \$82,000 and includes the following item:

Deliverable	Cost/Fee type
Preparation of the Five Year Consolidated Plan for FY 2025-2029 and FY 2025 Annual Action Plan	\$9,500 (balance of the cost for the CP will be billed and part of the 2025 contract).
Preparation of Consolidated Annual Performance and Evaluation Report (FY2024 CAPER)	Not to exceed lump sum fee of: \$8,500
Preparation of the HUD Annual Action Plan for FY 2026	Not to exceed lump sum fee of: \$9,000
Preparation of HOME ARP Policy and Procedure Manual	Not to exceed lump sum fee of: \$15,000
Hourly Rate Technical Assistance (includes items such as NSP program and close out services, HOME ARP services, HOP program loan and underwriting, RFP development, IDIS clean-up, on-going compliance, substantial amendment preparation, staff training and implementation consulting services and related other technical assistance for CDBG/HOME/NSP programs)	Budget amount not to exceed amount of: \$40,000

M&L will bill the County each month for actual work completed by each staff person for hourly rate technical assistance. For lump sum jobs, M&L will bill monthly based on actual percentage completed for the project.

Technical services would be billed hourly based on our current schedule shown below and be billed portal to portal. Hourly rate fees are inclusive of all costs including travel.

## M&L Hourly Rate Schedule for 2024-25

Person	Cost per Hour
President/CEO	\$290
Director of Community Development	\$240
Senior Project Manager	\$225
Support / Technical Staff	\$195
Administrative Support	\$65