

REQUEST FOR PROPOSALS (RFP) (E-Legal)

Legal Services for review of policies and procedures for land donation, real estate development documents, and long-term stewardship of land on a 99-year ground lease documents.

Issued by: Housing Trust Fund Ventura County/Housing Land Trust Ventura County

I. Introduction

Housing Trust Fund Ventura County (HTFVC)/Housing Land Trust Ventura County (HLTV) are soliciting proposals from qualified California-based law firms to review policies and procedures, legal documents, and land stewardship for a young, growing, and expanding Community Land. This program is to build capacity within a Housing Land Trust established in 2020 to receive donated land for the development of affordable housing on a 99-year ground lease within areas meeting the REAP 2.0 infill definition.

II. Background

HTFVC is a nonprofit community development financial institution (CDFI) with a mission to support the creation and preservation of affordable housing in Ventura County. Since 2013, HTFVC has provided nearly \$50 million in loans to affordable housing developments, primarily serving extremely low- to low-income households (30%–60% AMI).

In 2020, HTFVC created Housing Land Trust Ventura County (HLTV), as a supporting nonprofit of HTFVC, to hold donated land for the future development of affordable housing. To date, the Land Trust has received land from the City of Oxnard and a commitment from the City of Thousand Oaks.

As part of the development of HLTV, the organization needs assistance creating internal policies and procedures to evaluate land donation, assess liability of land donation, develop a NOFA process for working with developers, establish template documents for real estate development, and plans for strategic expansion. Legal review of these documents produced by outside consultants is required.

This proposal was developed under the Southern California Association of Governments Notice of Funds Available (NOFA) for the Lasting Affordability Program which supports innovative finance strategies for projects that support existing and establishing new housing trusts, land trusts and catalyst funds through the State Regional Early Action Planning Grant Program of 2021 (REAP 2.0). All projects funded by REAP 2.0 must meet its primary objectives, which are to accelerate infill housing development, reduce VMT, increase housing supply at all affordability levels, affirmatively further fair housing, and facilitate the implementation of adopted regional and local plans to achieve these goals.

III. Scope of Work

The selected consulting firm will be responsible for providing legal review of policies and procedures, legal documents, and land stewardship processes.

The firm shall establish template legal documents that develop the method and process for determining liability when accepting donated land (zoning, environmental review, appropriate for affordable housing, liability/risk, access to water, etc.), develop risk analysis procedures and processes, establish template affordable housing development documents (long-term ground leases or disposition agreements), and improve capabilities to develop exclusive negotiation agreements.

As applicable, consultant is also responsible for crediting SCAG as a funder of the project. All public-facing communications materials produced under this contract shall acknowledge and give credit to SCAG, whether via a logo or text.

The firm shall support HLTVC staff as needed to obtain Board approval of the documents.

IV. Deliverables

- Edited versions of required documents
- At least one round of revision based on HLTVC feedback
- Final versions in editable Word and PDF formats
- Template legal documents for donated land transfers approved by the HLTVC Board
- Template affordable housing development documents approved by the HLTVC Board

- Legal memo explaining key provisions and recommended enforcement mechanisms

V. Desired Qualifications

- Licensed and in good standing to work in California
- Experience drafting policies and procedures, and template legal documents for Community Land Trusts, affordable housing development, public agencies or CDFIs
- Demonstrated experience working with Community Land Trusts, experienced in Land Trust real estate transactions, public agencies' land donation requirements and regulatory agreements, and land stewardship
- Experience with contracts utilizing Federal or State funding sources

VI. Proposal Requirements

1. Firm Overview – Background, size, relevant expertise
2. Team Members – Bios of key staff who would work on this project including a real estate attorney
3. Relevant Experience – Examples of similar work completed, particularly with nonprofit community land trusts, public agencies, other housing nonprofits, or CDFIs

4. Work Plan – Outline of your approach and timeline
5. Fee Proposal – Including fixed fee or hourly rate estimates, and any assumptions
6. References – Contact information for at least two relevant clients

VII. Evaluation Criteria

- Demonstrated experience and expertise (45%)
- Quality of work plan and understanding of the assignment (25%)
- Cost-effectiveness (20%)
- References and prior client satisfaction (10%)

VIII. Timeline

- RFP Release Date: October 13, 2025
- Proposal Due Date: October 31, 2025
- Firm Selection: November 14, 2025
- Project Completion Target: Within 7 months of contract execution for all deliverables. No later than June 30, 2026.

IX. Submission Instructions

Please submit your proposal in PDF format via email to:
Linda Braunschweiger, CEO
Linda@HousingTrustFundVC.org
Subject line: “RFP – HLTVC REAP II Grant Proposal (E)”

X. Questions

Questions may be submitted by October 22, 2025. Responses will be shared with all interested firms.