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## **Request for Proposals (07/17-339)**

### **Richmond Place Apartments MASTER LEASE OR MANAGEMENT AGREEMENT**



**Issue Date:** July 5, 2017  
**Proposal Due Date:** August 30, 2017

**Submittal Location:** Home Forward  
135 SW Ash St.  
Fifth Floor – Procurement &  
Contracts Department  
Portland, OR 97204

# REGISTRATION FORM

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## HOME FORWARD PORTLAND, OREGON

RFP 07/17-339  
July 5, 2017

### PERMANENT SUPPORTIVE HOUSING OPERATORS AT RICHMOND PLACE APARTMENTS

This registration is necessary to ensure timely delivery of addenda or supplements to this RFP.

Complete this form and email to RFP contact.

Name of Firm: \_\_\_\_\_

Contact: \_\_\_\_\_

Business Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

**HOME FORWARD**  
**REQUEST FOR PROPOSALS 07/17-339 FOR**  
**PERMANENT SUPPORTIVE HOUSING OPERATORS**  
**AT RICHMOND PLACE APARTMENTS**

**Issue Date: July 5, 2017**



**Section 1. Invitation**

The mission of Home Forward is to assure that the people of the community are sheltered. Home Forward has a special responsibility to those who encounter barriers to housing because of income, disability or special need. Home Forward will continue to promote, operate and develop affordable housing that engenders stability, self-sufficiency, self-respect and pride in its residents and represents a long-term community asset. Home Forward will be a community leader to create public commitment, policy and funding to preserve and develop affordable housing.

Home Forward seeks a qualified provider of Permanent Support Housing (PSH) at Richmond Place Apartments. Home Forward will Master Lease or sign an Agreement to an operator that will be responsible for providing property management and case management—or partner with another qualified provider for these services—for the residents of Richmond Place Apartments. Responses should include an operational plan to provide PSH services and property management which may be performed through a combination of internal staff, contracted vendors, and community partners. A proposed operating budget and identified funding sources are included in this RFP, and respondents should include both in their response and any proposed modifications or funding sources.

Issue Date:	July 5, 2017
Pre-Proposal Conference:	July 27th, 2017
Due Date:	August 30, 2017 by 4:00 P.M. Submissions must be delivered electronically as a PDF document no larger than 20MB. Subject line shall reference 07/17-339. Submissions received after this deadline will not be considered.
Registration:	In order to receive further updates, changes and notifications in the form of addenda, you must register your interest in this RFP. A Registration Form is located at page 2 of this packet. Please email the completed form to <a href="mailto:Procurement_contracts@homeforward.org">Procurement_contracts@homeforward.org</a> .
Submit Proposals to:	Home Forward Procurement Office <a href="mailto:Procurement_contracts@homeforward.org">Procurement_contracts@homeforward.org</a>

RFP Contact:	Peter Garcia Home Forward 135 SW Ash Street, 5 <sup>th</sup> Floor Portland, OR 97204 Tel: 503-802-8549 Email: <a href="mailto:Heather.Hebert@homeforward.org">Heather.Hebert@homeforward.org</a>
Document Availability:	A hard copy of the RFP and all required forms and attachments may be obtained at Home Forward's Procurement & Contracts Department located at 135 SW Ash Street, 5 <sup>th</sup> Floor, Portland, OR 97204, Monday through Friday during business hours beginning on July 5, 2017.

## Schedule

Activity	Date
Request for Proposal Issued:	July 5, 2017
Pre-Proposal Meeting:	July 27, 2017
Deadline to Submit Questions:	1 week before due date
<b>RFP Submittal deadline:</b>	<b>August 30, 2017</b>
Notice of Competitive Range	Sept. 6, 2017
Panel Interviews:	Week of September 11th, 2017
Selection of Richmond Place Master Lessee:	Week of September 18th, 2017
Contract Effective Date	January 1, 2018

Every effort will be made to keep to this schedule. However, all dates are subject to change if it is deemed to be in the best interest of Home Forward. Those who have submitted a registration form will be promptly notified of any changes.



## Section 2. Scope of Services and Property Information

### Project Description

Richmond Place is an apartment community located at SE 41<sup>st</sup> and Division in Portland's Richmond neighborhood. The 21-unit property consists of 2 studios, 12 one-bedroom units, and 7 two-bedroom units. One studio unit could serve as an on-site manager's office. Richmond Place also includes offices, community space, a playground and laundry facilities. Current programming consists of transitional housing for homeless families. Impact NW identifies Richmond Place as "recovery-oriented housing," and offers recovery services to residents who choose to participate. Richmond Place is owned by Home Forward and presently master leased to Impact NW. Richmond Place was financed through a combination of funding sources and a loan from the Portland Housing Bureau. Richmond Place's operating expenses are currently funded through a combination of HUD Continuum of Care grants and the Multnomah County General Fund.

## Status

The project is fully leased up and operating. HUD views transitional housing grants unfavorably, and has prioritized the conversion of local Continuum of Care grants from transitional housing to permanent housing. Impact NW is planning on transitioning out as the master lessee as of July 31, 2017, and they will attempt to locate new homes for the current families. There is a possibility that some of the families that cannot find permanent housing elsewhere will remain housed at Richmond Place if they meet the new eligibility requirements of the PSH program.

## Proposed Alternative

Home Forward proposes converting Richmond Place to a Permanent Supportive Housing (PSH) program. The selected organization will Master Lease the Richmond Place Apartments to provide all property management functions and will be responsible for any and all regulatory compliance and reporting and property management. The same selected organization will also be responsible for providing case management and resident services that are appropriate for a PSH program. Home Forward will assign Project-Based Housing Choice Vouchers to Richmond Place Apartments to provide dedicated operating revenues. Home Forward is presently working with the Portland Housing Bureau (PHB) to address the necessary capital improvements and provide greater financial stability. As part of the conversion to PSH, Richmond Place will house a range of household sizes, accommodated by the property's unit mix of studios, one-bedroom and two-bedroom apartments. Home Forward is seeking a PSH operator to provide property management, case management and resident services. Property management, case management and resident services may be performed through a combination of internal staff, contracted vendors, and community partners. Responses to this RFP should include an operational plan describing how all required services will be provided.

One (1) unit could be used as an on-site Manager's unit or alternative proposed by the respondent. An alternate could be the remaining studio, one-bedroom or two-bedroom unit offered to accommodate a wide range of income-eligible households. It is Home Forward's preference that units will be restricted to households with incomes at or below 30% AMI and supported with Project-Based Voucher rental subsidy. The offline manager's unit will not be subject to any income restriction.

## Projected Rehabilitation Planning

Home Forward responded to a recent PHB Request for Interest (RFI) for a proposed rehabilitation of Richmond Place. Scope of work includes exterior siding, window, roof, and full rehabilitation of all interior apartments. Construction is projected to begin upon notification of award from PHB.

## Project-Based Vouchers

Project-Based Vouchers (PBV), which will be administered through Home Forward's Rent Assistance Department beginning January 1, 2018, will subsidize twenty or twenty-one PSH units (depending on whether one of the studios will serve as a manager's unit). The PBV units must be managed in accordance to the Housing Assistance Payments Contract for Richmond Place Apartments, which will include specific waiting list policies, standard eligibility and screening criteria for applicants, and a standard lease for residents.

## Unit Mix

The table below show the breakdown of unit type and the planned lease up schedule.

Unit Size	PBV*	Income Preference
Studio	\$1,044	>30%
1 bedroom	\$1,204	>30%
2 bedroom	\$1,295	>30%

*\*Rents are based on the full payment standard for Project-Based Vouchers rents from the 4-1-2016 schedule for apartments communities residing in Inner SE Portland. Currently, the property pays for all the utilities.*

**Expected Resident Profile**

[A Home for Everyone](#)—our community effort to end homelessness, of which Home Forward is a part—prioritizes PSH services for people with long experiences of homelessness who have disabilities that are severe enough to require long-term housing support. These households could include:

- Individuals and families experiencing chronic homelessness
- Persons with disabilities, including physical and behavioral health, that are severe enough to require long-term housing support
- People with demonstrated vulnerability factors (e.g. exposure to violence, age, criminal justice involvement, historic or generational trauma, survivors of domestic violence or sexual assault)

While priority populations will often align with those meeting the U.S. Department of Housing and Urban Development (HUD) definition of chronic homelessness, eligibility is not intended to be exclusively limited to HUD-defined chronically homeless households. Similarly, while many referrals are anticipated to come through Coordinated Access, referrals that meet population priorities may come from other sources. Client referral sources will be determined through ongoing collaboration among Home Forward, the City of Portland/Multnomah County Joint Office of Homeless Services, and the selected operator.

Home Forward is open to different proposals regarding what specific populations will be served at Richmond Place and the specific service model, provided it complies with Oregon Landlord Tenant Law and establishes a permanent supportive environment.

Depending on the population served, there may be additional service dollars and leveraged services available through the City of Portland/Multnomah County Joint Office of Homeless Services and/or the Multnomah County Health Department. These Departments are particularly interested in a partnership with Home Forward and the selected operator to serve, in some or all of the units at Richmond Place, individuals experiencing severe mental health issues who have received services in an Emergency Department; mental health designated shelter; or mental health transitional, supported or structured housing program. Additional living skills and crisis supports would be made available to these individuals through the Health Department. Proposers are encouraged, though not required, to incorporate such a partnership into their proposal.

**Operating Budget:**

A summary of the operating budget assumptions is shown in the table below:

Line Item	Annual	Notes
Utilities	\$62,731	Water, Sewer, Gas, Electric
Maintenance	\$27,140	Maintenance Contracts, Landscaping
Turnover	\$6,900	
Payroll	\$50,788	Onsite Management, Onsite Maintenance.
Manager Unit	\$15,540	Studio
Administration	\$6,478	Legal, Accounting, Phone, Internet
Security	15,000	Contracted Security
Insurance	\$4,443	

Resident Services or Case management	\$47,734*	
Lessee-Base Rent	\$23,400	Base Rent/Reserve
<b>TOTAL</b>	<b>\$260,154</b>	

\* Depending on the population served, there may be additional service dollars and/or leveraged services available through the Multnomah County Joint Office of Homeless Services and Health Department.

**Operating Budget Narrative:**

The largest variable in the above table is in the contracted \$15,000 for security services. Depending upon the individual staffing plan, this may not be a necessary expense. The Base Rent payment paid directly from the Lessee to Home Forward (Owner) is \$900 per month, in addition to the Replacement Reserve monthly deposit of \$1,050 per month. Monthly total paid by Lessee to Owner will be \$1,950 for the first year. Payroll would include positions related to on-site property management and maintenance, such as an Assistant Manager, Property Manager and Maintenance Generalist. Administration expenses are audit, legal, accounting, administrative unit and other office expenses.

**Essential Qualifications for Managing Richmond Place Apartments**

- Previous experience managing housing designated for families and individuals with special needs
- Demonstrated success in working in partnership with service providers
- Previous experience with Home Forward is preferred
- Previous experience with project based vouchers



**Section 3. Proposal Content & Evaluation Process**

**RFP Evaluation Criteria**

Proposals will be evaluated by an Evaluation Committee and scored based on the criteria stated below. Only those Proposals scoring 80 points or higher will be considered within the competitive range. Proposers whose submissions score within the competitive range will advance to the interview stage of the selection process.

<b>Experience and Qualification</b>	<b>Total Possible Points</b>
<ul style="list-style-type: none"> <li>• Current portfolio</li> <li>• Experience operating housing for special needs populations</li> <li>• Demonstrated ability to work with resident populations facing multiple social and economic challenges</li> <li>• Demonstrated ability to work in partnership with area service providers</li> <li>• Years of property management experience</li> <li>• Experience and knowledge around specialized compliance areas</li> </ul>	<b>30</b>
<p><b>Capacity</b></p> <ul style="list-style-type: none"> <li>• Appropriateness of operating policies and personnel procedures</li> <li>• Proposed staffing, as well as supervision and support</li> <li>• Financial reporting and accounting capabilities</li> </ul>	<b>20</b>
<p><b>Operation and Programming</b></p> <ul style="list-style-type: none"> <li>• Type and scale of services</li> <li>• Plans for outreach and referrals</li> </ul>	<b>50</b>

<ul style="list-style-type: none"> <li>• Leveraged services</li> <li>• Coordination between property management and resident services</li> <li>• Cost effectiveness</li> </ul>	
<b>Total Score</b>	<b>100</b>

**Proposal Content**

Please provide a PSH Operations Plan for Richmond Place that includes the following topics:

**1) Experience and Qualification (30 Points)**

- a. Describe the population you propose to support at Richmond Place
- b. Provide a list of properties under management or ownership that are Permanent Supportive Housing for individuals or families who are formerly homeless with special needs. Identify for each asset:
  - Name of Property
  - Type of Property (Garden style, mid-rise, high-rise, etc.)
  - Number of Units
  - Number of years managing or providing services
  - Number of properties in geographic proximity.
- c. How will you support property management’s coordination with on-site case management or resident services personnel?
- d. Describe your experience in working with diverse resident populations, including minority families and or homeless population.
- e. Describe the organization’s qualifications to serve the proposed population(s). Include in the description if the lead organization or any partnering organizations are either culturally-specific or mainstream organizations with culturally-responsive programming and practices.

**2) Capacity (20 Points)**

- a. Describe your accounting and property management software capabilities to meet financial and compliance reporting requirements.
- b. Provide your proposed staffing plan (the titles in Table 1.1 below are only suggestions). Specify whether you propose any staff to live on site. Please specify the titles, FTE levels and compensation for each proposed staff member or contracted provider.
- c. If available, provide the name and experience of the proposed property manager that would supervise Richmond Place Apartments. What is the maximum number of units and properties assigned to the property manager?

Table 1.3

Position	FTE level	Wage rate	Benefits
Site Manager			
Assistant Manager			
Maintenance			
Case Managers			
Resident Services Coordinators			
Other Maintenance/ Other Staff:			

- d. Describe your plan to manage emergency coverage for the residents of Richmond Place 24-hours a day.
- e. How will you handle neighborhood issues from the commercial tenants and other neighbors?

### 3) Operation and Programming (30 Points)

- a. Describe the type and scale of supportive services you plan to provide for participants.
  - How will the project meet the specific needs of the population(s) it proposes to serve?
  - How will you deliver services?
  - What other services will you leverage?
  - How will the services you provide assist participants in maximizing their ability to live independently?
- b. What outreach efforts will be used to identify people in need? How will referrals be received and preferences applied?
- c. How will you support property management's coordination with on-site case management or resident services personnel?
- d. What would you revise in the current budget assumptions?

### Evaluation Process

Home Forward will appoint an Evaluation Committee to evaluate proposals received. The Committee shall apply the evaluation criteria described above in scoring all responsive Proposals. Proposals scoring 75 points and above will be considered within the competitive range, and will move forward to the interview stage of the selection process. Those Proposals with scores below 75 points, and thus, outside of the competitive range, will not move forward in the selection process. At the interview, Home Forward will ask the Proposer to clarify specific aspects of its Proposal, as well as answer any questions regarding the content of the Proposal or questions relevant to the work contemplated by this RFP. Following the interview stage, the Evaluation Committee make an award recommendation to the Executive Director.



## SECTION 4. RFP REQUIREMENTS AND CONDITIONS

### Minimum Requirements

This RFP sets forth the minimum requirements that all submissions shall meet. A responsive submission is a Proposal submitted by the submission deadline, and includes all required components. Failure to submit proposals in accordance with this request will render the proposal unacceptable. Proposals received after the submission deadline will not be accepted and evaluated.

Each proposal shall comply with the following specification

1. 8.5" x 11" format, either vertical or horizontal.
2. Font size no smaller than 10 points; margins no greater than 1".
3. The Proposal shall include the completed Proposal Cover Sheet included as Attachment A of this document. The Proposal shall include page numbers and the name of the Proposer in the page footer. The proposal shall not exceed 12 pages in length including the cover page and all submittal requirements.
4. One (1) full color hard copy original, secured with a binder clip.
5. One (1) portable drive with a single Portable Document Format (PDF) file of the Proposal.

6. The hard copy original and the portable drive shall be enclosed in a sealed envelope marked with the project title, RFP number, and the business name and address of the Respondent.
7. Acknowledge receipt of all addenda in the space provided on the Cover Sheet.

### **Pre-Contractual Expenses**

Costs incurred by any proposer in the preparation of its response to the RFP are the responsibility of the proposer and will not be reimbursed by Home Forward. Proposers shall not include any such expenses as part of their proposals.

### **Changes to the Solicitation**

Home Forward reserves the right to make changes to the RFP. Home Forward shall make changes by written addendum, which shall be issued, to all prospective proposers listed on Home Forward's Proposer list for this RFP.

A prospective Proposer may request a change in the RFP by submitting a written request to the RFP contact. The request must specify the provision of the RFP in question, and contain an explanation for the requested change. All requests must be submitted no later than eight (8) days prior to the date set for the receipt of proposals. Simple questions may be answered verbally, but any verbal responses provided will not bind Home Forward to substantially change the RFP.

### **Cancellation of the RFP**

Home Forward reserves the right to cancel this RFP at any time without liability if cancellation is deemed to be in the best interest of Home Forward. The proposer assumes the sole risk and responsibility for all expenses connected with the preparation of its proposal.

### **Public Record**

All information submitted by proposers shall be public record and subject to disclosure pursuant to the Oregon Public Records Act, except such portions of the proposals for which proposer requests exception from disclosure consistent with Oregon law. All requests shall be in writing, noting specifically which portion of the Proposal the Proposer requests exception from disclosure. The Proposer shall not copyright, or cause to be copyrighted, any portion of any said document submitted to Home Forward as a result of this RFP.

### **Collusion**

The Proposer, by submitting a proposal, hereby certifies that no officer, agent, or employee of Home Forward has a pecuniary interest in this Proposal; that the Proposal is made in good faith without fraud, collusion, or connection of any kind with any other proposer; and that the Proposer is competing solely in its own behalf without connection with, or obligation to, any undisclosed person or firm.

### **Publicity**

Any publicity giving reference to this project, whether in the form of press releases, brochures, photographic coverage, or verbal announcement, shall be only with the general or specific approval of Home Forward.

### **Disputes**

In case of any doubt or differences of opinions as to the participation sought hereunder, or the interpretation of the provisions of the RFP, the decision of Home Forward shall be final and binding upon all parties.

## Appeals

Following identification of Proposals within the Competitive Range and final scoring of Proposals in the Competitive Range, Home Forward will issue a Notice letter to Proposers.

1. Competitive Range Protest and Intent to Award Protest. An adversely affected or aggrieved Proposer may submit a written protest of Home Forward's decision regarding the Competitive Range and/or the Notice of Intent to Award. The protest shall specify the grounds upon which the protest is based. To be adversely-affected or aggrieved, the Proposer must demonstrate that but for Home Forward's (a) error in failing to reject a non-responsive higher-ranked proposal, or (b) substantial violation of a provision in the RFP or applicable procurement statute or administrative rule, or (c) error in evaluating and scoring the protesting party's Proposal, the protesting party would have been awarded the Contract.
2. Latest Date to Protest. Protests must be received by Home Forward no later than seven (7) calendar days from the date of the Home Forward's Competitive Range Notice or Notice of Intent to Award, unless indicated otherwise in the letter.
3. Protest Delivery. Protests shall be delivered in hard copy to the address below no later than 2:00PM on the protest due date. Late protests shall not be considered. Any protests of this solicitation should be sent to:  

Berit Stevenson  
Purchasing & Contracts Manager  
Home Forward  
135 SW Ash Street, 5<sup>th</sup> Floor  
Portland OR 97204
4. Hearing. At the request of the protesting party, a hearing will be conducted before the Manager for Purchasing and Contracts or other person so delegated by Home Forward's Executive Director within seven calendar days after submission of the written protest. The Manager for Purchasing and Contracts or other person so delegated by Home Forward's Executive Director shall consider a written protest and issue a written decision on the protest. A protest that is filed in an untimely manner or that fails to allege facts that support a finding that the protestor is an aggrieved Proposer will not be considered.



## Attachment A – Proposal Cover Sheet

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Name of Organization: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Contact Person Phone: \_\_\_\_\_

Contact Person E-mail: \_\_\_\_\_

MWESB Certification #: \_\_\_\_\_

I acknowledge that I received any issued addenda to the solicitation document: \_\_\_\_\_