

Request for Proposals
Permanent Supportive Housing
Episcopal Community Services of San Francisco

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1 Company Introduction

Episcopal Community Services of San Francisco (ECS) is requesting proposals from qualified property management companies that have demonstrated experience in the overall management, maintenance, compliance, and lease-up of permanent supportive housing (PSH) and properties financed with low income housing tax credits (LIHTCs) with a strong background in relationship building, internally and externally. We are seeking a property management company to work with us on facilitating the management of up to 7 properties in our PSH/LIHTC portfolio.

It is anticipated that ECS will provide asset management oversight to this portfolio and work closely with the selected property management company. ECS's resident services department will provide on-site service coordination and oversight of selection of direct service providers for the PSH populations residing at the specific properties. ECS has also engaged an independent consultant who will provide oversight of the property management company's performance on behalf of ECS until further notice by ECS.

2 Property Summary

Summarized below are the properties included in this RFP.

2.1 Overview

Name	City	Total Units	Supportive Units / %
Bishop Swing Community House	San Francisco	135 Studios	100
Canon Barcus Community House	San Francisco	48 1-4 Bedrooms	100
Canon Kip Community House	San Francisco	104 Studios	100
Hotel Diva	San Francisco	121 Studios / 1 bedroom	100
Granada Hotel*	San Francisco	214 Studios with and without bathrooms	100
1064 Mission	San Francisco	258 studios	100
1251 South Eliseo	Greenbrae	44 studios	100

*Granada is undergoing a significant rehab process that commenced in April 2022 and is expected to be completed Fall 2024. Capital improvements include seismic work, plumbing system upgrades and unit remodels.

a. Bishop Swing Community House

Property Summary

Address	275 10th Street, San Francisco, CA 94103
Construction Type	L-Shaped 5-story structure Type V 1HR – floors 2-5 – residential studios, Type I, fire resistive – ground floor – mixed use
Key Funding Sources	LIHTC, HCD MHP, CCSF HOME, CCSF AHF, and CCSF SFRA
Additional Operating Resources	CCSF LOSP for 75 units, PBV for 42 units, and COC for 17 units

Population & Services Summary

# of Units	AMI Restriction	Population	Lease Up Referral Source
134	50% AMI	Formerly homeless households	CCSF and ECS Coordinated Entry; San Francisco Housing Authority (SFHA) for PBV units

b. Canon Barcus Community House

Property Summary

Address	670 Natoma Street, San Francisco, CA 94103
Construction Type	Type V 1HR, 3-5 story structures, 1-4 Bedroom units (four 1-Bedroom; twelve 2-Bedroom; twenty-seven 3-Bedroom, and five 4-Bedroom units)
Key Funding Sources	LITHC, CCSF CDBG, CCSF HOPWA, First Republic, CCSF Loan, Original Residual Receipts Loan, and Formerly Amortized Loan
Additional Operating Resources	PBV for 32 units and COC for 15 units

Population & Services Summary

# of Units	AMI Restriction	Population	Lease Up Referral Source
9	35%	Formerly homeless households	CCSF and ECS Coordinated Entry; San Francisco Housing Authority (SFHA) for PBV units
26	45%		
7	50%		
5	60%		

c. Canon Kip Community House

Property Summary

Address	705 Natoma Street, San Francisco, CA 94103
Construction Type	Stucco, wood frame, 1 building, 5-story
Key Funding Sources	LIHTC, HCD MHP, CCSF CDBG, HCD LPR
Additional Operating Resources	COC for 80 units and VASH PBV for 19

Population & Services Summary

# of Units	AMI Restriction	Population	Lease Up Referral Source
45	15% AMI	Formerly homeless households	CCSF and ECS Coordinated Entry; San Francisco Housing Authority (SFHA) for VASH PBV units
52	30% AMI		
6	50% AMI		
1	60% AMI		

d. Hotel Diva

Property Summary

Address	432-436 Geary Street, San Francisco, CA 94102
Construction Type	One 7-story structure above a full basement. The ground floor is occupied by the hotel lobby and two commercial/retail tenant spaces. The upper floors are all residential.
Key Funding Sources	HCD Homekey, CCSF OCOH
Additional Operating Resources	CCSF LOSP for 121 units

Population & Services Summary

# of Units	AMI Restriction	Population	Lease Up Referral Source
109 Studios	30%	Formerly homeless households	CCSF and ECS Coordinated Entry
12 1-bedrooms	30%		

e. Granada Hotel

Property Summary

Address	1000 Sutter Street, San Francisco, CA 94109
Construction Type	One 10-story structure above a full basement. The ground floor is occupied by the lobby, lounge, offices, dining room and commercial grade kitchen. The upper floors are occupied by resident's rooms.
Key Funding Sources	HCD Homekey, CCSF SFHAF, CCSF Acquisition
Additional Operating Resources	CCSF LOSP for 212 units

Population & Services Summary

# of Units	AMI Restriction	Population	Lease Up Referral Source
212	30%	Formerly homeless households	CCSF and ECS Coordinated Entry

f. 1064 Mission

Property Summary

Address	1064 Mission, San Francisco, CA 94103
Construction Type	Modular housing units; two 6-story buildings, Residential (1064 Adult & 1066 Senior) and Commercial Spaces: CHEFS Kitchen (1068 Mission) & DPH Clinic (555 Stevenson)
Key Funding Sources	LIHTC, CCSF NPLH, FHLB AHP
Additional Operating Resources	CCSF LOSP for 256 units

Population & Services Summary

# of Units	AMI Restriction	Population	Lease Up Referral Source
76 Adult 51 Senior	30%	Formerly homeless households	CCSF and ECS Coordinated Entry
77 Adult 52 Senior	50%		

g. 1251 South Eliseo

Property Summary

Address	1251 South Eliseo Drive, Greenbrae, CA 94904
Construction Type	1-story building, V-B Single Story Wood Frame
Key Funding Sources	HCD Homekey; HCD NPLH
Additional Operating Resources	PBV for 43 units and County of Marin Operating Subsidy

Population & Services Summary

# of Units	AMI Restriction	Population	Lease Up Referral Source
15	15%	Formerly homeless households	County of Marin Coordinated Entry
28	30%		

Supportive services and programs are provided at these properties. Case managers, clinicians, and other supportive services staff offer the following:

- Therapeutic case management and counseling to residents to help them stabilize and maintain their housing. Residents are provided with information about services available in the community. Referral and advocacy services are offered.
- The teaching of daily living skills to assist residents to become more independent while bringing enrichment activities on-site.
- Creation of a thriving living environment to enhance the residents' quality of life.

Furthermore, the City's Department of Public Health has agreed to provide an onsite nurse at 1064 Mission.

3. RFP Scope of Work Requirements

a. Key Requirements

i. Experience Requirements

The Company selected to provide property management services will be expected to meet the requirements and provide the services set forth below:

1. The selected Company must be a professional organization with a primary line of business that includes property management services.
 - The Company must have experience with performing property management services for similarly-sized and type of properties and be able to obtain approval for management from the appropriate regulatory entities.
 - The selected company must have a robust risk management process which will protect ECS properties asset from risk/exposure.
2. Strong partnership(s) with local authorities, governmental agencies and community partners.
 - A documented history of community/neighborhood engagement.
 - Detailed and good communication protocols in place that work with internal and external facing clients.
 - Documented history of responsiveness and cooperation with local governments and elected officials.
3. Core skills include comprehensive knowledge and understanding of relevant property management laws and operations in California, staff with excellent oral and written communication skills, sound judgment, the ability to work well with and maintain the confidence of the ECS Board, Executive Leadership, and staff, and the ability to deliver property management services in a timely and cost-effective manner.
4. Demonstrated successful experience in the management of permanent supportive housing programs/communities, housing tax credit, project and tenant-based section-8 and other affordable housing programs including housing for families.
5. Evidence of experience in lease-ups, including experience in screening a high volume of applicants. Evidence of the ability to develop and implement an effective marketing and pre-leasing plan.

6. Strong asset management experience to complement the work of the ECS asset management team in coordination with property management.
7. Demonstrate an established cooperative and strong working partnership with resident services and supportive services.

ii. Contract Requirements

1. Minimum insurance coverage of the property management company must include the following items and proof of such insurance must be provided on an annual basis. ECS, and other entities as required by regulators, lenders and investors must be listed as an additional insured payee:
 - Commercial General Liability: \$1 MM per occurrence, \$2 MM aggregate
 - Automobile Liability: \$3 MM Combined Single Limit per accident
 - Workers Compensation: \$1 MM per occurrence,
 - Professional Liability (Errors & Omissions): \$1 MM per occurrence, \$2 MM aggregate
 - Umbrella Liability: \$5 MM per occurrence, \$5 MM aggregate

Important Note:

As part of the anticipated Contract, these insurance requirements should cover the Company broadly and will not be reimbursed as part of the sites' operating expenses.

1. The Company must have all necessary permits and licenses including a broker's license to perform the requested service. The selected Company must be bonded where applicable.
2. The selected Company shall provide all personnel, equipment, tools, materials, vehicles, supervision, and other items and services necessary to perform all services, tasks, and functions as defined in this RFP
3. The selected Company shall comply with all Federal, State and Local laws and follow the most restrictive guidance in cases of conflicting guidance. All work shall be performed in accordance with all applicable laws and codes, manufacturers' recommendations, and accepted industry standards. The selected Company will comply with all Federal, State and Local laws concerning safety. The Company shall manage all work areas to ensure the safety of the residents, employees and visitors in, near or around the communities.

4. The initial term of the contract awarded pursuant to the RFP will be for a 5 year period with ECS. The contract will allow for 90 day termination option, or a shorter termination option as required by project regulators, lenders, investors or by ECS due to non or unsatisfactory performance by the Company as determined by ECS.

5. Non-Discrimination Requirement: By submitting a proposal, the Company represents that it and its subsidiaries do not and will not discriminate against any employee or applicant for employment on the basis of race, religion, sex, color, national origin, sexual orientation, ancestry, marital status, physical condition, pregnancy, or pregnancy-related conditions, political affiliations or opinion, age, or medical condition.

b. Scope of Work - Responsibilities

i. General Property Management Responsibilities

Hire, train and supervise all onsite staff, to include office, maintenance, janitorial and other personnel as required. Clearly disclose if, how, when and why subcontractors and/or temporary employment agencies will be contracted by the Company to fill any onsite positions. Ensure that staff training includes critical areas of permanent supportive housing such as drug overdose and suicide prevention and conflict resolution/de-escalation,

- Identify and address emergency situations immediately and provide follow-up remediation while keeping the ECS staff and/or designee informed.
- Have an incident reporting and crisis response protocol established which is inclusive of ECS.
- The selected Company shall provide a 24-hour response process for emergency situations, including maintenance work orders and other resident situations.
- Periodic training to include fire prevention and fire drills with the participation of the local Fire Department to the greatest extent possible.

ii. Resident-Related Responsibilities

- Initially qualify applicants and maintain resident eligibility in all appropriate regulatory program(s)
- Fill vacant units in a timely manner, including working with appropriate referral agencies
- Administer leases and enforce resident lease holders' obligations
- Communicate with ECS, its designee and residents regarding any building issues that will affect them (e.g. work being conducted on elevators, window washing, lobby floor maintenance)
- Coordinate with ECS Resident Services coordination teams and with resident services partners to ensure resident programming is being fulfilled, service agencies are supported and our mission for

residents to remain housed is intact, as appropriate. Attend and contribute to productive weekly and monthly coordinating meetings with designated ECS representatives.

- Coordinate resident events including regular community meetings
- Timely address resident reasonable accommodation requests under Section 504 guidelines.
- Comply with all CA Landlord Tenant requirements
- Collaborate with ECS in implementing ECS's eviction prevention protocols to endeavor to keep residents housed.

iii. Maintenance Responsibilities

- Manage resident work order calls, dispatch, documentation and follow up as appropriate
- Timely turn over vacant units
- Coordinate all scheduled and unscheduled maintenance work
- Coordinate and supervise minor resident improvement work (e.g. paint, carpet, etc.)
- Actively participate in environmental conservation (water, electricity, trash, etc.) efforts
- Create, monitor, update and implement items in a preventive maintenance schedule that thoroughly covers a property's pertinent systems

iv. Vendors / Capital Projects Responsibilities

- Supervise vendor services and contract administration, obtain proof of insurance. Ensure that all vendors are direct contacts of the Company and able to provide professional services under the supervision of the Company.
- Provide a minimum of 3 estimates for capital work in excess of \$5,000 or unbudgeted work that is non-emergency
 - Notify ECS if work is an emergency is anticipated to be over \$5,000
- Hold periodic meetings with ECS to discuss capital repairs and property status
- Provide project management for major unit improvements and capital items

v. Compliance / Administration Responsibilities

- Prepare and submit all required unit-level regulatory reporting as required by any Federal, State, or Local program associated with the property
- Ensure continued program compliance throughout the life of the contract
- Notify ECS in advance of any inspections by any partners, regulatory or city/local, state or federal agencies. Promptly respond to inspection findings and work to resolve them.
- Conduct property inspections/tours as required and appropriate
- Periodically review existing building rules and regulations and present recommendations to ECS to modify existing rules and regulations as deemed appropriate
- Allow ECS viewer access to designated compliance and accounting software (e.g. Yardi, RealPage OneSite)
- Prepare monthly and/or quarterly narrative regarding property operations, financial results, delinquencies, and other reports as required by ECS and its partners

vi. Accounting/Financial Reporting Responsibilities

Monthly

- Collect rents, late fees and other fees/charges as appropriate
- With approval from ECS, prepare and serve 3, 10, or 30 day notices
- Prepare monthly financial reports including but not limited to actual versus budget operating statements, accounts receivables/aging report, general ledger, balance sheet, rent roll, security deposit ledger, and variance reports
- Assist in preparation and submission of regular replacement reserve, services reserve or operating reserve draws

Annual

- Prepare annual operating budget and a five (5) year capital plan.
 - This includes capital improvements and detailed suggestions for the improved operation of the property with a detailed narrative
- Assist in annual audit preparation to ensure a timely, successful outcome
- Complete and submit timely HAP rent increases for approval by the appropriate agency/agencies.

General

- Administer bank accounts
- Provide accounts receivables and payable duties
 - Follow-up on accounts receivables – bill late fees as appropriate and approved by ECS
 - Log rent checks and other receivables received for financial reporting purposes
 - Approve, input and pay all invoices on a weekly basis
- If applicable, calculate quarterly distributions to owners/lenders
- Report financial information to ECS monthly and upon request
- Provide information needed in preparing welfare exemption reporting

4. Evaluation and Selection Process

Proposals will be evaluated upon the following criteria by ECS staff:

1. Qualifications and experience of the Company with management/operation of permanent supportive housing communities, including proven background in managing lease-up's, engagement with local agencies, and understanding of ECS's mission and philosophy.
Include REO schedule to assist ECS in understanding the breadth of the organization.
2. Qualifications and experience of the specific staff assigned to the project. Transparency in disclosing if, how, when and why subcontractors and/or temporary agencies will be used to fill any onsite staff positions.
3. The organization, completeness, and quality of the proposal. Thoroughness in addressing the Scope of Work Requirements indicated in this RFP.
4. Completeness of a transition checklist to be submitted by the Company to ECS listing the tasks it will complete prior to "Day 1" of assuming management of the designated ECS property or properties
5. Operational capacity
6. Quality of references
7. Quality of training agenda listing topics Company will train its employees on, including areas critical to the management of permanent supportive housing and properties financed with tax credits.
8. Teamwork, internally, within the community, with agencies/regulatory bodies, and with clients
9. Ability to identify and resolve issues in coordination with ECS. This includes proactively identifying issues and steps Company would take to resolve same.
10. Cost effectiveness of the proposal, including all fees to be charged by the Company
11. Proven and documented evidence of the Company's commitment to fair housing, diversity and inclusion.
12. Willingness and ability to manage as many of the ECS properties indicated in Section 2 above.
13. Commitment to the ECS relationship

These factors will be considered as a whole, without a specific weighting. The balancing of the factors is at ECS's sole discretion. Factors other than those listed may be considered by ECS in making its selection. ECS reserves the right in its discretion to request additional information from any Company, although such requests may not be made to all respondents.

ECS reserves the right to require one or more interviews with presentations by finalists to be conducted with ECS designees present.

5. Submittal Information/Requirements

a. Required Proposal Submission

- Provided in a separate document via email. See attached document labeled **“RFP Supplement”**

b. Schedule of Events

Respondents are encouraged to communicate any questions regarding this RFP by the deadline stated below in the RFP Calendar. Questions should be sent in writing via email to **Ancel Romero ancel@ancelgroup.com**. Questions and answers will be communicated to all respondents via email by the date stated in the RFP Calendar. ECS reserves the right to modify this schedule at any time.

Projected RFP Calendar

Deliverable	Date
Release of RFP	2/12/24
RFP Respondent Questions to ECS Due	2/26/24
RFP Answers Provided by ECS	3/4/24
RFP Submission Deadline	3/29/24
Announcement of RFP Decision by ECS	4/15/24

- c. It is the responsibility of the Proposer to address all communication and correspondence pertaining to this RFP process to the individual indicated Section 5.b above only. Proposers must not make inquiry or communicate with any ECS staff member about this RFP. Failure to abide by this requirement may be cause for ECS to not consider a proposal submittal received from any Proposer who has not abided by this directive.**

6. Disclaimer, Releases & Reservations

a. General Conditions

This RFP is not an offer to contract. Acceptance of a proposal neither commits ECS to award a contract to any company even if all requirements stated in this RFP are met, nor does it limit ECS's right to negotiate the terms of an engagement agreement in ECS's best interest, including requirement of terms not mentioned in this RFP. ECS reserves the right to contract with a company for reasons other than lowest price.

Failure to comply with the requirements of the RFP may subject the proposal to disqualification. Publication of this RFP does not limit ECS's right to negotiate for the services described in this RFP. If deemed to be in its best interest, ECS may negotiate for the services described in this RFP with a party that did not submit a proposal. ECS reserves the right to choose not to enter into an agreement with any of the respondents to this RFP.

b. Reservations by ECS

In addition to the other provisions of this RFP, ECS reserves the right to:

- Cancel this RFP, in whole or part, at any time
- Reject any or all proposals submitted in response to this RFP
- Make such investigation as it deems necessary to determine the Company's ability to furnish the required service, and the Company agrees to furnish all such information
- Reject the proposal of any company who is not currently in a position to perform the contract, or who has previously failed to perform similar contracts, or in a timely manner, or for any other reason at ECS's sole discretion
- Waive irregularities, to negotiate in any manner necessary to best serve the public interest, and to make a whole award, multiple awards, a partial award, or no award
- Award a contract, if at all, to the company which will provide the best match to the requirements of the RFP and the service needs of ECS at ECSs' sole discretion, which may not be the proposal offering the lowest fees
- Determine the extent, without limitation, to which the services of a successful company are or are not actually utilized
- The information that a company submits in response to this RFP becomes the exclusive property of ECS. ECS will not return any proposal or reimburse for proposal preparation or submission expenses.

- **Incomplete Responses:** If the information in the response is deemed to be insufficient for evaluation, ECS reserves the right to request additional information or to reject the submittal outright. False, incomplete, or unresponsive statements in connection with a submittal may be sufficient for rejection. The selection of the fulfillment of the requirements will be determined by ECS and such judgment shall be final.

c. Management Agreement

ECS will enter into a management agreement with the selected Company, which will contain such terms as ECS in its sole discretion may require. In addition, the selected Company will agree that this RFP and the Company's response will be incorporated into any resulting Agreement.

d. Confidentiality

This RFP and any confidential information acquired by Company from ECS concerning information about the properties and scope of services contemplated hereunder (including without limitation any data about third parties acquired through an Internet Web site, via electronic mail or through other communications media) shall not be disclosed by Company to others or used for Company's own benefit without written consent of ECS. The foregoing obligation shall not apply to any confidential information which: (i) without fault of the Company becomes a part of the public domain; or (ii) is received by the Company from a third party with the right to disclose it and without further restrictions on disclosure by Company.

RFP SUPPLEMENT

ECS PSH REQUEST FOR PROPOSAL

REQUESTED INFORMATION:

Please provide the requested information below and submit supporting documents as attachments where applicable.

Section Summary:

- 1) Contact Information
- 2) Company Information
- 3) Qualifications
- 4) Operations
- 5) Reporting
- 6) Information Systems and Technology
- 7) Compliance
- 8) Pricing Proposal
- 9) Acknowledgement
- 10) Submittal Instructions

1) CONTACT INFORMATION

- a. Company:
- b. Main Contact's First & Last Name:
- c. Title:
- d. Phone Number:
- e. Email:

2) COMPANY INFORMATION

- a. Brief history & background of Company:
- b. Mission statement, if available:
- c. Year Company was formed:
- d. Office location/s:
- e. Ownership structure & any affiliate or subsidiaries:
- f. Number of employees:
- g. Approximate 2023 Annual revenues:
- h. Scope of services offered:
- i. What is the average retention rate (years of service) of the Company's other clients?
- j. What is your overall organizational employee retention rate:

DOCUMENTS REQUESTED OR PROVIDED

- k. Please attach Company's organization chart
- l. Please attach Company's last audited financials
- m. Transition Checklist indicating all tasks to be undertaken by the Company before assuming management of the ECS property or properties. Include information that would be needed from ECS.**
- n. (OPTIONAL) List any supplemental documents you would like to attach:

3) QUALIFICATIONS

- o. Please describe how your Company has the background, experience, and other qualifications to provide professional property management services. Include industry memberships or associations your company participates in or belongs to.
- p. What are your Company's specialties, strengths, and limitations?

- q. What is your Company's experience managing affordable properties, and specifically, experience managing properties with permanent supportive housing in both urban and suburban settings? What is your Company's experience in managing properties funded under the HomeKey program?
- r. Describe your familiarity with Housing First and how it applies in selecting residents.
- s. What is your Company's experience in managing properties for low income families?
- t. List the local governmental agencies, community partners, and authorities in San Francisco and Marin County that you have worked with. (i.e. Housing Authorities, city department etc.)

DOCUMENTS REQUESTED OR PROVIDED

- u. (OPTIONAL) List any supplemental documents you would like to attach:

4) OPERATIONS

- a. Please define the benchmarks that your company has established to track portfolio and property over-all health (e.g. physical, fiscal, regulatory compliance)
- b. Please describe your staffing ratio for properties? What do you recommend for the property/properties listed in the RFP based on the information provided?
- c. How have you adjusted your standard operations to accommodate PSH populations on properties? Are there different factors such as training, hiring, retention, staffing and outsourcing that need to be considered?
- d. What are the best practices you have adopted to build working relationships with Support Services?
- e. Describe experience managing an initial lease-up, specifically where applicants may be sourced through a referral source, such as Coordinated Entry?
- f. Maintenance: What are your response times for different maintenance requests?

DOCUMENTS REQUESTED OR PROVIDED

- g. Please attach relevant policies / checklists / forms related to:
 - Management Agreement and Management Plan templates

- Maintenance / Preventative Maintenance Plan
 - Reasonable Accommodation
 - Operations Manual
 - Risk Management
 - Incident Reports
 - Emergency Response
 - Support Service MOU (MOU indicating commitments of property management and support service teams to each other)
- h. If available, provide sample onboarding plan/checklist used for lease-up, new company and/or new property.
- i. (OPTIONAL) List any supplemental documents you would like to attach in this section:

5) REPORTING

- a. How soon after period-end (month, quarterly, annual) are the financial reports/results delivered?

DOCUMENTS REQUESTED OR PROVIDED

- b. Please provide an example of a redacted monthly and annual report provided to owners. Include budget to actual variance reports, Capital Improvement Plan, and Operational Benchmark report
- c. Provide example redacted 2023 budget/proforma that would be representative of a standard budget and a lease-up budget with all anticipated expenses and costs to include any corporate or other fees that are passed on, e.g. computer charges, training, compliance.

6) INFORMATION SYSTEMS AND TECHNOLOGY

- a. Please list the Systems / software used for the following:
- Accounting system / financial reporting:

- Invoice Tracking:
- Vendor Management:
- Property Management:
- Utility Management
- Resident Portal / Resident User Interface (Example: rent payment portal, online workorder portal and other resident technology is available):
- Training (LMS – Learning Management Systems):
- Communication / File / Document Management (i.e. Teams, Slack, Trello)
- Other (List other systems used and purpose of software)

b. Describe your data security protocols: Check if attachment is included

DOCUMENTS REQUESTED OR PROVIDED

c. (OPTIONAL) List any supplemental documents you would like to attach in this section:

7) COMPLIANCE

- a. Please provide information regarding your compliance record with any regulatory agencies, specifically operating subsidies by County/ City.
 - Provide any information regarding uncorrected 8823's for the past three (3) years.
- b. Please provide information related to any Housing and Urban Development and/or any regulatory agency Fair Housing violations in the last three (3) years.
- c. Describe your experience working with multiple layers of funding and managing the compliance complexities this entails.
- d. Are any of your owned and/or managed properties currently referred to the Enforcement division of HUD for any reason? If yes, please provide us with the reason/s, status and corrective actions contemplated or taken.
- e. Have any of your owned and/or managed LIHTC properties been subject to the recapture of tax credits? If yes, please provide us with the reason/s, status and corrective actions contemplated or taken.
- f. Complete Exhibit A – which requires a summary on all (i) pending or threatened litigation in which Company is a party or, (ii) judgments or settlements against Company

that have been filed in the past five (5) years that are not related to housing evictions, (iii) judgements or settlements against Company for housing related evictions that resulted in judgements or settlements over \$100,000, and (iv) any current/ongoing or affirmative findings from administrative proceedings, examinations, or investigation by a local, state, or federal licensing or accreditation agency, tax authority, regulatory, or enforcement agency (i.e., Housing and Urban Development, Division of Occupational Safety and Health). An explanation of all actual or potential conflicts of interest that the Company may face in the representation to ECS specifically, and without limitation to other actual or potential conflicts.

DOCUMENTS REQUESTED OR PROVIDED

g. (OPTIONAL) List any supplemental documents you would like to attach in this section:

8) PRICING PROPOSAL

PRICING PROPOSAL FOR THE SCOPE OF WORK INCLUDING PRICING OF FEES AND COSTS, BILLING PRACTICES AND PAYMENT TERMS THAT WOULD APPLY.

- a. Include and separately list any and all corporate charges, allocations or costs that pass through to owners
- b. All pricing proposals should be “best and final,” even as ECS reserves the right to negotiate on pricing.

Additional Requests:

PLEASE PROVIDE THE NAMES AND QUALIFICATIONS OF FULLY TRAINED AND QUALIFIED STAFF THAT WILL BE ASSIGNED TO ECS'S WORK, INCLUDING A DETAILED PROFILE OF EACH PERSON'S BACKGROUND AND RELEVANT INDIVIDUAL EXPERIENCE.

a. Resume or CV of staff

IS THERE OTHER INFORMATION THAT THE COMPANY DEEMS RELEVANT TO THE ECS SELECTION PROCESS?

DOCUMENTS REQUESTED OR PROVIDED

b. Job Descriptions

PROVIDE JOB DESCRIPTIONS FOR BOTH SUPERVISORY (REGIONAL LEVEL) AND SITE STAFF EXPECTED FOR THE PROPERTIES

c. References

PROVIDE 3 REFERENCES

(OPTIONAL) LIST ANY SUPPLEMENTAL DOCUMENTS YOU WOULD LIKE TO ATTACH IN THIS SECTION:

9) ACKNOWLEDGEMENTS

- I _____ (Name) affirm that I have reviewed the ECS PSH RFP information document and that I, the signatory, am empowered and authorized to bind the Company to a Management Agreement with ECS. Furthermore, I represent and warrant that the information stated in the proposal is accurate and may be relied upon by ECS.

Name:

Title:

Date:

10) SUBMITTAL INSTRUCTIONS

Please email any questions or comments about this RFP no later than **12:00 midnight Pacific Standard Time on Monday, February 26, 2024** via email to Ancel Romero at ancel@ancelgroup.com.

RFP Submittals are due by **5:00 pm Pacific Standard Time on Friday, March 29, 2024** via email to Ancel Romero at ancel@ancelgroup.com.

**EXHIBIT A:
LITIGATION, JUDGMENTS, AND ADMINISTRATIVE PROCEEDINGS**

COMPANY NAME:

Instructions: Complete this form for any:

- (i) pending or threatened litigation in which Company is a party or;
- (ii) judgments or settlements against Company that have been filed in the past five (5) years that are not related to housing evictions;
- (iii) judgements or settlements against Company for housing related evictions that resulted in judgements or settlements over \$100,000; and
- (iv) any current/ongoing or affirmative findings from administrative proceedings, examinations, or investigation by a local, state, or, federal licensing or accreditation agency, tax authority, regulatory, or enforcement agency (i.e., Housing and Urban Development, Division of Occupational Safety and Health).

If there are no pending or threatened litigations and/or judgments, Company shall check the box marked "NO" and indicate "Not Applicable" on this form.

Indicate if your Company has any pending litigations or threatened and/or settlements, or ongoing or affirmative findings from administrative proceedings. If yes, complete the information below for each item noted above. Use additional pages, as necessary.	<input type="checkbox"/> YES <input type="checkbox"/> NO
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Case Name:	Case No:	Court Jurisdiction:
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Provide a statement describing the nature and amount of claimed damages of any pending or threatened litigation and/or judgments.
