

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:

Date:

Title:

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.