



Request for Proposals (RFP)
Permanent Supportive Housing Property Management
HomeRise
San Francisco, California

November 4, 2024

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1. Company Introduction

Community Housing Partnerships dba HomeRise is soliciting proposals from qualified property management companies for two HomeRise properties with a demonstrated track record in managing Permanent Supportive Housing (PSH) properties, specifically those financed with Low Income Housing Tax Credits (LIHTCs). We seek a third-party property management firm to oversee the operations of two of our properties, Jazzie Collins Apartments and Rene Cazenave Apartments, for an initial three (3) year term while our Asset Management team continues its oversight role. These properties are 100% PSH, and we must subcontract our unionized front desk clerks/security, maintenance technicians, and janitorial positions to the selected firm exclusively for these locations. Resident Services at the properties are provided by HomeRise at Jazzie Collins Apartments and the Felton Institute at Rene Cazenave Apartments.

2. Property Summary

Overview

HomeRise currently owns and operates 16 properties across San Francisco, and we are exploring third-party management for only two of these sites:

- **Jazzie Collins Apartments**

Jazzie Collins, Property Summary

Address	53 Colton St, San Francisco	
Construction Type	The building has a concrete basement and first floor, with wood frame construction above.	
Key Funding Sources	Multifamily Housing Program (MHP) funds from HCD, Multifamily Housing Revenue Bonds Loan from City & County of San Francisco (CCSF), Capital contribution from Investor limited partner (LP) and managing general partner (MGP), loan from admin general partner (AGP).	
Additional Operating Resources	Local Operating Subsidy Program (LOSP) from MOHCD.	

Population & Services Summary

# of Units	AMI Restriction	Population	Lease Up Referral Source
96	See the breakdown below for most restricted AMI	Formerly Homeless Households	CoC (HSH)

HCD Affordability Restrictions listed below are most restrictive:

# of Units	AMI%
10	20%
20	25%
46	30%
15	35%
3	50%
2	60%

- **Rene Cazenave Apartments**

Rene Cazenave Apartments, Property Summary			
Address	25 Essex Street, San Francisco, CA 94105		
Construction Type	Reinforced concrete slab, post tension concrete lateral systems		
Key Funding Sources	HCD, MOHCD, CalHFA, Enterprise		
Additional Operating Resources	60 LOSP units; 9 HOPWA units; 51 non-RAD PBV units		
Population & Services Summary			
# of Units	AMI Restriction	Population	Lease Up Referral Source
120	30%	Formerly Homeless Households	SFHA

Both properties house formerly homeless individuals and receive various forms of government subsidies and grants to maintain their operations. At these properties, a range of supportive services and programs are available to residents. Case managers, clinicians, and other service staff provide:

- **Therapeutic case management and counseling:** These services are designed to help residents stabilize and sustain their housing. Residents receive guidance on accessing community resources, along with referral and advocacy support.
- **Life skills education:** Residents are taught essential daily living skills to foster greater independence, complemented by on-site enrichment activities.
- **Fostering a positive living environment:** Efforts are made to create a vibrant community atmosphere that improves residents' overall quality of life.

Additionally, the City’s Department of Public Health ensures that a nurse is available on-site at Rene Cazenave Apartments through a contract with the Felton Institute, not including Jazzy Collins. Property management will be expected to coordinate services with the Residential Services Department (RSD) (Jazzy Collins) or Felton Institute (Rene Cazenave Apartments).

3. RFP Scope of Work Requirements

a. Key Requirements

i. Experience Requirements

The selected property management company must:

- Have significant experience in managing properties of similar size and type, specifically Permanent Supportive Housing and be able to obtain approval for management from the appropriate regulatory entities.
- Must be willing to subcontract HomeRise’s union positions - front desk clerks, maintenance technicians, and janitors- at both Jazzy Collins and Rene Cazenave Apartments.

HomeRise's union staff are members of the Service Employees International Union (SEIU) Local 1021.

- The selected property management company is responsible for hiring, training, and supervising all onsite staff, including the subcontracted union positions.
- Regular meetings must be conducted with HomeRise to review the performance of subcontracted staff and overall property management.
- Demonstrate robust risk management practices to protect HomeRise assets.
- The property management firm must collaborate with the HomeRise Resident Services team and service partners such as the Felton Institute at Rene Cazenave Apartments to ensure effective resident programs and support.
- Possess strong partnerships with local authorities, governmental agencies, and community partners.
- Show a history of effective communication with internal and external stakeholders.
- Be well-versed in California property management laws, especially those pertaining to PSH.
- Have a proven track record of managing lease-ups, particularly in screening high volumes of applicants.
- Ability to deliver property management services in a timely and cost-effective manner.
- Strong asset management experience to complement the work of the HomeRise asset management team in coordination with property management.
- Demonstrate an established cooperative and strong working partnership with resident services and supportive services.

ii. Contract Requirements

- **Insurance:** The selected company must maintain comprehensive insurance coverage, including but not limited to General Liability, Automobile Liability, Workers' Compensation, Professional Liability, and Umbrella Liability. Required minimum limits. Proof of such insurance must be provided on an annual basis. HomeRise, 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

Please note, under the expected contract, these insurance requirements must comprehensively cover the Company and will not be eligible for reimbursement as part of the site's operating expenses.

- **Licensing:** The company must hold all necessary permits and licenses, including a California real estate broker's license.
- **Compliance:** All work must comply with Federal, State, and Local laws, as well as industry standards. The selected Company must supply all personnel, equipment, tools, materials, vehicles, supervision, and any other resources required to carry out the services, tasks, and functions detailed in this RFP. The Company is also responsible for ensuring compliance with all safety regulations and must manage work areas to protect the safety of residents, employees, and visitors within and around the communities.
- **Contract Duration:** The initial contract term is three (3) years, with a 90-day termination clause for non-performance. A shorter termination period may be applied if required by project regulators, lenders, investors, or by HomeRise due to the Company's non-performance or unsatisfactory performance, as determined by HomeRise.
- **Non-Discrimination Requirement:** By submitting a proposal, the Company affirms that neither it nor its subsidiaries discriminate against any employee or applicant for employment based on race, religion, sex, color, national origin, sexual orientation, ancestry, marital status, physical condition, pregnancy, pregnancy-related conditions, political affiliations or opinions, age, or medical condition.

b. Scope of Work - Responsibilities

i. General Property Management Responsibilities

- Hire, train, and supervise all onsite staff, including HomeRise's subcontracted union positions (front desk clerks, maintenance technicians, and janitors). Transparently disclose if, how, when, and why the Company plans to use other subcontractors or temporary employment agencies to fill any onsite roles other than those of the HomeRise unionized subcontracted staff.
- Promptly identify and address emergency situations, ensuring follow-up actions are taken and HomeRise staff and/or required funders are kept informed.
 - Establish an incident reporting and crisis response protocol that includes HomeRise.
 - The selected Company must maintain a 24-hour response process for emergencies, including maintenance work orders and resident-related incidents.
 - Maintain Safety plan and comply with OSHA requirements. Maintain Emergency Preparedness and Response Plans.
 - Conduct periodic training sessions, including fire prevention and drills, for property management staff with the involvement of the local Fire Department whenever possible.

- Ensure all staff are trained in PSH-specific areas such as overdose prevention and de-escalation techniques.

ii. Resident-Related Responsibilities

- Manage resident eligibility and fill vacant units promptly. Maintain resident eligibility in all appropriate regulatory program(s).
- Administer leases and enforce resident obligations.
- Keep HomeRise, its representatives, and residents informed about any building issues that may impact them (e.g., elevator repairs, window cleaning, lobby floor maintenance).
- Collaborate with HomeRise Resident Services team, Felton Institute, and/or resident service partners to ensure that resident programs are carried out effectively, service agencies receive the necessary support, and our mission to keep residents housed is upheld. Participate actively in weekly and monthly coordination meetings with HomeRise and/or Felton Institute representatives, and funders, when necessary.
- Participate in resident events, including regular community meetings.
- Promptly address resident requests for reasonable accommodations in accordance with Section 504 guidelines.
- Adhere to all California Landlord-Tenant laws.
- Work with HomeRise to implement eviction prevention protocols (ex. applying for Emergency Rental Assistance Payment (ERAP) and repayment agreements) aimed at helping residents maintain their housing.

iii. Maintenance Responsibilities

- Handle all maintenance requests, including preventive maintenance and emergency repairs.
- Supervise vendor services and contract administration.
- Oversee vendor services and contract management, ensuring that proof of insurance is obtained. Ensure all vendors are directly contracted by the Company and are capable of delivering professional services under the Company's supervision.
 - Obtain at least three estimates for capital projects exceeding \$10,000 or for unbudgeted non-emergency work.
 - Inform HomeRise if any emergency work is expected to exceed \$10,000.
 - Conduct regular meetings with HomeRise to review capital repairs and discuss the status of the property.
 - Manage projects related to significant unit improvements and capital improvement expenditures.

iv. Compliance/Administration Responsibilities

- Prepare and submit all necessary unit-level regulatory reports as required by any Federal, State, or Local program associated with the property.
- Ensure ongoing compliance with all program requirements for the duration of the contract.
- Notify HomeRise in advance of any inspections by partners, regulatory bodies, or city, state, or federal agencies. Promptly address and resolve any findings from these inspections.
- Conduct property inspections and tours as needed and appropriate.
- Regularly review existing building rules and regulations, and provide recommendations to HomeRise for any necessary modifications.
- Prepare and submit monthly and/or quarterly narratives detailing property operations.

v. Accounting/Financial Reporting Responsibilities

Monthly

- Collect rents, late fees, and other applicable charges.
- With HomeRise's approval, prepare and serve 3-, 10-, or 30-day notices as necessary.
- Prepare and submit monthly financial reports, including but not limited to, actual versus budget operating statements, accounts receivable/aging reports, general ledger, balance sheet, rent roll, security deposit ledger, and variance reports.
- Assist in the preparation and submission of regular draws for replacement reserves, service reserves, or operating reserves.

Annual

- Develop the annual operating budget along with a five-year capital plan, including capital improvements and detailed recommendations for enhancing the property's operations, accompanied by a comprehensive narrative.
- Assist in preparing for the annual audit to ensure a timely and successful outcome.
- Complete and submit HAP rent increase requests in a timely manner for approval by the appropriate agency or agencies.

General

- Manage bank accounts.
- Handle accounts receivable and payable tasks.
 - Follow up on accounts receivable, including billing late fees as approved by HomeRise.

- Record rent checks and other receivables for financial reporting purposes.
- Approve, enter, and pay all invoices on a weekly basis.
- If applicable, calculate and process quarterly distributions to owners or lenders.
- Provide financial information to HomeRise on a monthly basis or upon request.

4. Evaluation and Selection Process

Proposals will be evaluated based on the following criteria, in no particular order:

1. Experience with managing PSH and LIHTC properties.
2. Quality of the team assigned to the project.
3. Track record for coordination of property management and resident services.
4. Thoroughness and organization of the proposal.
5. Operational capacity and cost-effectiveness.
6. Commitment to fair housing, diversity, and inclusion.

5. Submittal Information/Requirements

a. Required Proposal Submission

- Proposals must include a detailed company history, qualifications, a staffing plan, a compliance record, and a pricing proposal.

b. Schedule of Events

Respondents are encouraged to submit any questions related to this RFP by the deadline outlined in the RFP Calendar. Inquiries should be sent in writing via email to Eileen Myers at emeyers@homerisesf.org. All questions and responses will be shared with all respondents via email by the date specified in the RFP Calendar. HomeRise reserves the right to adjust this schedule at any time.

- **RFP Release:** November 4, 2024
- **Properties Site Visit:** November 21, 2024
- **RFP Respondent Questions to HomeRise Due:** November 25, 2024
- **RFP Answers Provided by HomeRise:** December 2, 2024
- **Submission Deadline:** December 9, 2024

- **Selection Announcement:** December 20, 2024

c. Disclaimer, Releases & Reservations

HomeRise reserves the right to cancel the RFP, reject any or all proposals, and negotiate with the selected firm.

i. General Conditions

This RFP is not an offer to enter into a contract. Acceptance of a proposal does not obligate HomeRise to award a contract to any company, even if all RFP requirements are met. Additionally, it does not limit HomeRise's right to negotiate the terms of an agreement in the best interest of the organization, including the possibility of requiring terms not mentioned in this RFP. HomeRise reserves the right to contract with a company for reasons other than the lowest price.

Failure to meet the requirements outlined in this RFP may result in disqualification of the proposal. The publication of this RFP does not restrict HomeRise's right to negotiate for the services described herein. If it is deemed in the best interest of HomeRise, negotiations may be conducted with a party that did not submit a proposal. HomeRise reserves the right to decline entering into an agreement with any of the respondents to this RFP.

ii. Reservations by HomeRise

In addition to the other provisions outlined in this RFP, HomeRise reserves the right to:

Cancel this RFP, in whole or in part, at any time.

Reject any or all proposals submitted in response to this RFP.

Conduct any investigations deemed necessary to assess the Company's ability to provide the required service, and the Company agrees to provide all requested information.

Reject the proposal of any company that is not currently in a position to fulfill the contract, has previously failed to perform similar contracts satisfactorily or on time, or for any other reason at HomeRise's sole discretion.

Waive irregularities, negotiate as necessary to best serve the public interest, and make a full award, multiple awards, a partial award, or no award.

Award a contract, if at all, to the company that best meets the requirements of the RFP and the service needs of HomeRise, even if this is not the proposal offering the lowest fees.

Determine the extent to which the services of the selected company are utilized, without limitation.

Retain ownership of all information submitted in response to this RFP. HomeRise will not return any proposals or reimburse for any expenses incurred in preparing or submitting a proposal.

Request additional information if a proposal's content is deemed insufficient for evaluation, or reject the submission outright. False, incomplete, or unresponsive statements may be grounds for rejection. The determination of whether the requirements have been met will be made by HomeRise, and such judgment shall be final.

iii. Management Agreement

HomeRise will enter into a management agreement with the selected Company, which will include terms that HomeRise, at its sole discretion, deems necessary. The selected Company agrees that this RFP and the Company's response will be incorporated into any resulting agreement.

iv. Confidentiality

This RFP and any confidential information acquired by the Company from HomeRise regarding the properties and scope of services outlined herein (including, but not limited to, any data about third parties obtained through an Internet website, via email, or through other communications media) must not be disclosed to others or used for the Company's own benefit without written consent from HomeRise. This obligation does not apply to confidential information that: (i) becomes public through no fault of the Company, or (ii) is received by the Company from a third party with the right to disclose it.