

ENTERPRISE COMMUNITY PARTNERS, INC.

REQUEST FOR QUALIFICATIONS

Asset Management Technical Assistance

Spring 2023

PURPOSE & OVERVIEW

Enterprise Community Partners, Inc. (Enterprise) has initiated a Request for Qualifications (RFQ) process to qualify firms and consultants (also referred to herein as “contractors”) to provide affordable housing providers (Community Development Corporations, or CDCs) in the Southern California market support on asset management related needs. Contractors may submit qualifications for one or more areas of expertise outlined within this RFQ. Qualifications will be submitted through SlideRoom at this link:

<https://enterprise.slideroom.com/#/permalink/program/71405>

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About Enterprise

[Enterprise](#) Community Partners, Inc. (“Enterprise”) is a national nonprofit on a mission to make home and community places of pride, power and belonging for all. To make that possible, we operate the only organization designed to address America’s affordable housing crisis from every angle: we develop and deploy programs and support community organizations on the ground; we advocate for nonpartisan policy at every level of government; we invest capital to build and preserve rental homes people can afford; and we own, operate and provide resident services for affordable communities. With this end-to-end approach, 40 years of experience and thousands of local partners, Enterprise has built and preserved 662,000 affordable homes, invested \$53 billion in communities, and changed millions of lives.

Overview

Enterprise’s Southern California market programming includes a focus on building the organizational capacity of community-based development corporations that are mission-driven to create and sustain affordable housing and to foster communities that are equitable, resilient, and less prone to displacement. We are currently working collaboratively with 10 organizations across Los Angeles County through our Neighborhood Exchange cohort. Generally speaking, these organizations are mission-driven nonprofits that have housing portfolios ranging from 200 to 2,500 units, including a mix of affordable and permanent supportive housing. During planning conversations in 2022, members have identified the need for additional technical and financial support related to asset management functions.

Enterprise Community Partners is responding to this capacity need by initiating a targeted technical assistance effort. Through this Request for Qualifications (RFQ), we invite asset management experts, technical assistance providers, and/or consultants to submit qualifications that evidence sufficient ability to organize and deliver technical content on different asset management related and portfolio sustainability needs for multifamily, affordable housing. The goal of this work is to ensure these organizations have the information, practices, tools, and systems in place to manage their assets and emerge financially stronger and better able to carry out their missions. As we work across different communities, we are committed to prioritizing the staffing of programs with consultants that reflect the diversity of the communities we serve. Enterprise will make efforts to utilize and prioritize small businesses, minority-owned firms, and women’s business enterprises.

Technical assistance interventions will include both group trainings and individual, tailored engagements around unique topics. Due to the varying needs of affordable housing owner operators in Southern California, this RFQ is designed to solicit responses from multiple contractors to address these broad needs. However, contractors with the capacity to deliver group trainings and individual technical assistance are encouraged to submit qualifications for both types of engagements. Proposers should submit qualifications covering activities they are interested in working on.

Description of Services

Group Learnings

Enterprise will be responsible for hosting group learning events/sessions. This will include logistics planning for virtual or in-person sessions, coordinating invitations for audience members, and collaborating with contractors on training agendas. Trainings are expected to be conducted virtually, however there is the potential for in-person engagements. The contractor will be responsible for developing session content and leading training sessions, including session presentations and discussions. Group engagements are meant to be interactive with audience participation throughout the course of the sessions. The contractor will be expected to offer office hours for the duration of the trainings to assist program participants in completing assignments associated with each session. The contractor will be responsible for providing guidance, sample worksheets, or dashboards as required for each session so that participants can develop materials for their internal organizational use going forward. Duration of the group trainings will be commensurate with the training content and will be determined by the contractor. The expected size of the training audience can range from 10-15 participants on the smaller end to 50-75 participants on the larger end. While the size of training audience can vary, Enterprise will work with the contractor to ensure the audience size is commensurate with the training content. Training materials created by the contractor shall be made available to be archived for future reference. More information below on group training topics.

Overview of Group Training Topics:

- **Year 15 Training, Part One** – Introduction to Year 15 and preparing for exit.
- **Year 15 Training, Part Two** – Executing exit and navigating the post-exit landscape.
- **Understanding Annual Financial Audits and Tax Returns** – Provide guidance to CDC staff on how to use audits and tax returns as tools to their full extent and help identify what investors look for in audits.
- **Asset Management Responsibilities Across the Organization** - Ensure that all parties within an organization are familiar with their respective asset management responsibilities and understanding how asset management interplays with other

organizational departments, including but not limited to the financial team, asset management team, senior leadership, and board members.

- **Understanding Key Performance Metrics** – Help participants understand the components of property and portfolio assessment management plans.
- **Best Practices for Preventive Maintenance/Needs Assessment** – Discuss the importance of being able to identify the physical needs of a project and preventative practices for proactive maintenance with a specific focus on how these skills help asset managers better establish metrics.

Individual Technical Assistance Engagements

Individual TA engagements will be informed by a paid initial assessment period facilitated by Enterprise where contractors meet with CDC representatives to learn more about their organization, discuss existing barriers, map asset management goals, and identify additional resources and tools to further refine the scope of technical assistance engagement. Following the initial assessment period, Enterprise and the contractor will meet to review the newly informed scope of work and discuss anticipated time spent on each engagement. One-on-one engagements with organizations are expected to span several weeks including the initial assessment period. More information on anticipated individual technical assistance engagements below.

Individual Technical Assistance Topics (to be further developed with CDCs):

- **Develop Asset Management Dashboard, Reporting, and Compliance Monitoring Systems** – Provide tools and assistance to develop and implement an asset management dashboard that will enable proactive data-driven financial and performance management and help monitor compliance.
- **Analysis of Watchlist Properties** – Provide tools, professional services, and recommendations to effectively plan for the rehab and financial viability of watchlist properties.
- **Comprehensive Asset Management Assessment and Recommendations** – Assess and provide recommendations for managing large portfolios as well as support in preparing for large number of units coming online over the next few years.

Submission Requirements

Please note that single consulting firms as well as teams of two or more firms are eligible to apply. Responses should include the following qualification materials:

General Information

1. Organization/consultant name
2. Organization address
3. Organization website
4. Name of the primary point of contact
5. Email of the primary point of contact
6. Small, Minority, and Women's Business Enterprises
 - a. Minority Business Enterprise?
 - b. Native American Business?
 - c. Small Business?
 - d. Women-Owned Business?
 - e. Veteran-owned small business?
 - f. Service-disabled veteran-owned small business
 - g. SBA certified small disadvantaged business
 - h. SBA certified 8(a) firm
 - i. SBA certified HUBZone firm
7. Are you partnering with another consulting firm to submit materials under this RFQ? If yes, please list them.
8. Which engagements is your team most interested in? You may select more than one engagement in both the group learnings and individual TA categories.
 - a. Group Learnings:
 - i. Year 15 Training, Part One
 - ii. Year 15 Training, Part Two
 - iii. Understanding Annual Financial Audits and Tax Returns
 - iv. Asset Management Responsibilities Across the Organization
 - v. Understanding Key Performance Metrics
 - vi. Best Practices for Preventive Maintenance/Needs Assessment
 - b. Individual Technical Assistance:
 - i. Develop Asset Management Dashboard, Reporting, and Compliance Monitoring Systems
 - ii. Analysis of Watchlist Properties
 - iii. Comprehensive Asset Management Assessment and Recommendations
9. Are there other training topics or technical assistance interventions that are not included in this list of engagements that your firm is experienced in and would be interested in leading that relate to the broader theme of asset management technical support to affordable housing providers in Southern California?

Qualifications

No more than 4 pages and must include:

1. Please provide a brief description of your consulting firm(s) including expertise and qualifications in developing and leading asset management trainings and providing group and individual technical assistance on the topics outlined within the Description of Services.
2. Identification of key personnel, including names, titles, and areas of expertise specific to those listed within the Description of Services.
3. Brief description of relevant projects on which the organization and/or team members have been involved in the last two years, illustrating current experience and capabilities relevant to this initiative.
4. Please attach the resumes and bios for everyone on the team.

Rate Sheet

Please include firm rate sheet listing the rates for all individuals that will work on the initiative.

References

Based on past projects for the areas of expertise specific to those listed within the Description of Services, please provide the contact information of the two most recent clients for whom similar services were provided. References may or may not be contacted as a part of the selection process at the discretion of Enterprise. Written letters of reference are not required.

Selection Criteria

Applicants will be scored on the below criteria:

1. Demonstrated expertise evidenced by professional certifications, accreditations, industry recognition, quality of submitted work samples, past relevant experience, etc. Demonstrated experience in the affordable housing industry, including asset management. (40 points)
2. Ability to produce high quality work as evidenced by past project experience and references. (20 points)
3. Reasonableness of rates in relation to the respondent's skills and experience. (20 points)
4. Demonstrated commitment to diversity, equity, inclusion and racial justice in organizational practices, policies, staffing and work within the community. (20 points)

Enterprise may contact references to confirm quality of work and a history of responsiveness and good communication skills.

Contractors earning at least 75 points overall, with at least 45 combined points for criteria 1 and 2, will be considered qualified under this RFQ.

Notification of Selection and Timeline

Bidder will receive notification from Enterprise on their qualification status within 15 business days from the submission due date. Upon qualification, Enterprise is not obligated to retain a contractor for any award. Enterprise will reach out to qualified bidders to request price quotations on specific scopes of work through verbal/written solicitation. Qualified entities will be expected to indicate their availability to perform the scope of work and timeline for submission of deliverables. Project deliverables and timelines shall be detailed for each individual scope of work. Upon finalization of scope and budget, Enterprise will issue an award. Work is expected to begin no earlier than mid-May 2023.

Submission Instructions

To be considered for this project, **qualifications must be submitted by April 7, 2023.**

Enterprise reserves the right to extend this deadline as necessary.

Inquiries concerning this RFQ should be directed to Michael Claproth, Program Director at mclaproth@enterprisecommunity.org.

Qualifications must be submitted in SlideRoom by clicking here:

<https://enterprise.slideroom.com/#/permalink/program/71405>

All costs incurred in the preparation of a response to this RFQ are the responsibility of the applicant and will not be reimbursed by Enterprise Community Partners, Inc.

By submitting qualifications, applicant commits to the terms and conditions outlined in this RFQ. Requests for exception to any terms or conditions must be submitted with the qualifications. Enterprise reserves the right to deny requests for exception to any terms and conditions. Requested exceptions will be factored into Enterprise's consideration of award.

Right to Reject

Enterprise reserves the right, in its sole discretion, to reject any and all responses received in response to this RFQ.

Small Businesses, Minority-Owned Firms, and Women's Business Enterprises

Enterprise will make efforts to utilize small businesses, minority-owned firms, and women's business enterprises.

Confidentiality

If the applicant deems any materials submitted to be proprietary or confidential, the applicant

must indicate as such in the relevant section(s) of the response.

Conflict of Interest

The applicant must disclose, in an attachment to their qualifications, any possible conflicts of interest that may result from the award of the contract or the services provided under the contract. Except as otherwise disclosed in the submitted qualifications, the applicant affirms that to the best of its knowledge there exists no actual or potential conflict between the applicant, the applicant's employees or their families' business or financial interests ("interests") and the services provided under the contract. In the event of any change in either interests or the services provided under the contract, the applicant will inform Enterprise regarding possible conflicts of interest, which may arise as a result of such change and agrees that all conflicts shall be resolved to Enterprise's satisfaction or the applicant may be disqualified from consideration under this RFQ. "Conflict of interest" shall include, but not be limited to the following:

1. Giving or offering a gratuity, kickback, money, gift, or anything of value to an Enterprise official, officer, or employee with the intent of receiving a contract from Enterprise or favorable treatment under a contract;
2. Having or acquiring at any point during the RFQ process or during the term of the contract, any contractual, financial, business, or other interest, direct or indirect, that would conflict in any manner or degree with applicant's performance of its duties and responsibilities to Enterprise under the contract or otherwise create the appearance of impropriety with respect to the award or performance of the contract; or
3. Currently possessing or accepting during the RFQ process or the term of the contract anything of value based on an understanding that the actions of the applicant or its affiliates or interests on behalf of Enterprise will be influenced.

Attachments

Attachment 1: Enterprise Standard Terms & Conditions