

**COMMUNITY ACTION PROGRAM OF EAST CENTRAL OREGON
211 SE Byers Avenue, Pendleton, Oregon 97801**

**REQUEST FOR PROPOSAL (RFP) FOR
PROPERTY MANAGEMENT SERVICES**

DEADLINE FOR SUBMITTING PROPOSAL

November 20, 2024

Attn: Alyssa Alexander
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541-278-5688

INTRODUCTION

CAPECO has worked with communities since 1987 to build a diverse portfolio of affordable housing. Our affordable and supportive housing properties are thoughtfully designed and carefully managed. We currently own 101 residential housing units in four properties: two in Morrow County and two in Umatilla County.

Our portfolio includes properties financed with Low Income Housing Tax Credit, HOME, Farmworker Tax Credit, Rural Economic Community Development, Housing Trust Fund, Section 811 Capital Advance and Housing and Urban Development.

CAPECO is seeking proposals from qualified firms to provide property management services for the residential rental properties in its portfolio. The selected Property Management Firm will provide rent collection, eviction, inspection, maintenance and repair, tenant move in/out, financial services, and work cooperatively with CAPECO staff and consultants to manage the properties.

AGENCY BACKGROUND

CAPECO is a private non-profit organization agency incorporated in 1987 under the Internal Revenue Service Code Section 501(c)3 to “Assisting those in need by combatting the causes and conditions of poverty to enhance well-being, dignity, and justice through direct delivery of services, partnerships, and advocacy.” As a community action agency, CAPECO seeks to mobilize human and financial resources at local, state, and federal levels to benefit disadvantaged persons residing in Umatilla, Morrow, Wheeler, Gilliam, Sherman, Hood River, and Wasco Counties.

SCOPE OF WORK

Provide property management services, as outlined below for the residential properties outlined in Exhibit 1. CAPECO will only accept proposals to provide property management services for all four properties located in Boardman, Irrigon, Hermiston, and Pendleton Oregon.

Provide Property Management Services for all residential units outlined in Exhibit 1, including:

- **Leasing & Tenant Management**
 - Advertise to lease CAPECO properties. Screen and select tenants utilizing at a minimum the following criteria: credit application, personal reference checks and personal interviews.
 - Execute existing affirmative marketing plan and tenant selection procedure that ensure prospective tenants are not discriminated against due to race, religion, national origin, familial status, etc., in compliance with the Fair Housing Act and other applicable laws.
 - Execute, administer, and enforce terms of all rental agreements, in compliance with federal, state and local laws and maintain copies of executed agreements.
 - If applicable, collect and manage proof of insurance on tenants and vendors as required by CAPECO policy.

- Enforce building rules and regulations and present recommendations to designate CAPECO staff to review, and modify existing rules and regulations as deemed necessary.
 - Represent CAPECO's interest in all matters involving the tenant regarding the lease agreement.
 - Manage and resolve conflicts between and among tenants. Document and maintain a database of communications with tenants on issues, complaints, and resolution.
 - Terminate tenancies and serve notices as appropriate. Recover possession of CAPECO premises rent and other monies due.
 - Institute legal action in the name of CAPECO and appear in court when necessary.
 - Conduct final inspection when property is vacated and maintain move-out inspection reports.
 - Process move-in and move-out activities in accordance with written policies.
- Financial Management
 - Properly bill rent, including tenant portion and applicable subsidies, in accordance with written policies.
 - Collect rents, fees and late charges and collect and disburse security and other deposits in accordance with written policies and procedures.
 - Charge electric, gas, garbage, sewer, water and other utility billing as required.
 - Calculate and allocate common area maintenance in accordance with written policies and in accordance with rental agreements.
 - Work with CAPECO to determine appropriate mechanisms to procure goods and services to ensure compliance with applicable regulation including but not limited to Federal Acquisition Regulation.
 - Proactively seek rent increases on subsidized and unsubsidized units within the portfolio.
 - Ensure tracking with requirements of loan documents, and other regulatory agreements as applicable.
 - Interface with sponsor's Asset Management Staff or applicable personnel.
 - Provide the following reports:
 - Rent roll with lease charges
 - Append with any rent change letters from subsidy providers
 - Receivable Summary by tenant charge type
 - Explain any late subsidy payments
 - Explain uncollected tenant payments
 - Demonstrate that charges are correct
 - Demonstrate that receipts are properly applied to correct charges
 - Explain balances of greater than 10%
 - Vacancy Report
 - Explain efforts to fill vacant units
 - Provide average days vacant

- Move-Ins and Move-Outs reporting
 - Demonstrate that Move-Ins and Move-Outs have been properly completed (all compliance documentation has been completed and accepted by regulators/monitors)
 - Recertifications and lease renewals reporting
 - Demonstrate that all documentation has been properly completed and accepted by regulators/monitors
 - Deposit accounting report
 - Demonstrate that any security deposits have been returned properly
 - Waitlist activity
 - Provide activity reports on wait lists to demonstrate good faith efforts to lease up vacant units.
 - Subsidy provider documentation (from Subsidy Provider)
 - Submit consolidated receipts
 - Submit any tenant payment adjustments
 - Monthly and Year-to-Date Budget v. Actual Reports
 - Explain any variances over 10%
 - Balance Sheet
 - Aged Receivables Report
 - Explain receivables over 30 days
 - Aged Payables Report
 - Explain payables over 30 days

- Property Maintenance
 - Process tenant work order calls, dispatch, and follow up as appropriate.
 - Log all tenant maintenance requests for future reference.
 - Provide 24-hour emergency contact for emergency repairs and report emergencies to the CAPECO by the end of the next business day.
 - Monitor properties on a regular basis for repairs and preventive maintenance, contract with subcontractors to provide repair, maintenance, janitorial, landscaping and pest control services, as needed.
 - Coordinate and supervise minor tenant improvement work (i.e. paint, carpet, etc.).
 - Have access to skilled specialists for repair and maintenance work and have the ability to address property maintenance in a timely manner and property related emergencies on a 24-hour a day basis.
 - Manage and oversee any improvements or modifications made to properties.
 - Ensure independent contractors have necessary licensing and insurance coverage.
 - Communicate to CAPECO and tenants regarding building issues that will affect them (i.e. work being conducted to window washing, lobby floor maintenance, etc.).
 - Provide a monthly report/statement for each property clearly indicating the rental income received, income charged for services, what those services are, vacancies, delinquencies, turnover schedule and budget for unit/property maintenance.

- Prepare annual operating budgets and a five (5) year capital plan for each property. This includes suggested capital improvements and detailed suggestions for the improved operation of the property with a detailed narrative.
 - Perform and record an annual inspection of each property in compliance with accepted national housing standards and any state or local code requirements.
 - Work with CAPECO on any code compliance issues that may arise.
- Compliance Activities
 - Processing recertifications.
 - Compliance with applicable rules of financial documents including loan docs and other regulatory agreements as applicable.
 - Specify willingness and ability to assist with annual audit cycles for each property.
 - Single Audit preparation and response to audit requirements.
 - Various investor annual reporting and compliance requirements.
- Contract Management
 - Submit monthly performance reports detailing performance metrics stated below and make recommendations conforming with industry best practices.
 - Submit monthly reports detailing actual performance against established performance metrics.
 - Provide monthly invoices to CAPECO for services rendered; fees must be supported by financial and performance reports.
 - Meet monthly with CAPECO Senior Management team to review portfolio status and other key upcoming milestones.

PROPOSER'S SUBMITTAL

Proposers must complete and submit their proposal to the designated individual listed within this solicitation no later than the date specified on the cover of the RFP. Proposal must include the following:

1. Cover/Transmittal Letter
2. Executive Summary – provide an overview of the Proposer's company including the range of services offered by the Proposer, years in business, and a brief history.
3. Firm experience and qualification statement, including:
 - a. Brief history, including the year the respondent firm was formed and number of employees.
 - b. Business form of the proposer, whether a corporation, limited liability company, partnership, joint venture, or other legal entity. Respondents should also indicate any parent company(ies), if applicable.
 - c. Submit a representative list of clients Proposer has served in the past three (3) years.
4. Provide a proposed staffing plan, including:

- a. List of key personnel, qualifications and organizational chart. In addition to key personnel, please provide resumes for the respondent's proposed Contract Manager / Key Liaison.
 - b. Provide a list of the names and qualifications of fully trained and qualified staff that will be assigned to this contract, including a detailed profile of each person's background and relevant individual experience.
5. Provide copies of any pertinent licenses or descriptions of pertinent training required to deliver respondent's product or service.
6. State your ability to begin work and the capacity of your firm to dedicate resources needed to provide the services requested.
7. A detailed method of approach to the scope of work which indicates the services proposed to be performed by the Proposer. This section should confirm the Proposer's understanding of the RFP including:
 - a. Description of your firm's approach to the scope of work
 - b. Performance data for properties under management, including average statistics for the following:
 1. Occupancy
 2. Economic Occupancy
 3. Collection Rate
 4. Average Days Vacant
 5. Budget versus Actual Expenses
 6. Delinquency Rate
 7. Work Order Requests and Completion
 8. Timely Recertification
 9. Customer Services
8. Provide narrative responses to the following questions:
 - a. CAPECO has the following goals for the performance of its properties. Please describe what efforts your firm will utilize to achieve the following goals:
 1. Occupancy – 95%
 2. Economic Occupancy – 90%
 3. Collection Rate – 90%
 - b. Describe property management systems used and explain how this system would provide CAPECO with the necessary tools to assist in their property management efforts.
 - c. Describe and outline your firm approach to performing maintenance activities. Do you have in-house skilled specialists for repair and maintenance work with the ability to address property maintenance? If not does your firm outsource this work and if so, describe how you manage and oversee this work. Describe and outline the manner in which you ensure a timely response to property-related emergencies on a 24-hour a day basis.
 - d. Describe and outline your systems, practices, and approach to compliance with relevant laws and regulations including but not limited to re-certification,

- lease renewal, eviction, annual inspections, etc. Please describe how your firm aligns roles and responsibilities related to compliance with its clients.
- e. Describe and outline your resident supportive services plan. How do you plan to integrate with CAPECO staff programs and service providers? How will you assist with the execution of and renewal of applicable service agreements?
9. Evidence of Financial Viability
 - a. Please provide evidence of financial viability including financial statements for the past three (3) years. If the annual financial statements are not audited, please provide reviewed financial statements, along with a signed statement by an appropriate officer of the respondent that: “The financial statements have been prepared in accordance with Generally Accepted Accounting Principles.” Please explain any exceptions.
 10. Provide at least three (3) references for which the respondent has provided similar property management services. Please include for each reference, the individual point of contact, email and phone number, a summary of the work performed, and the length of time the respondent provided this service.
 11. Provide an explanation of all actual or potential conflicts of interest that the respondent may face in the representation of CAPECO.
 12. Provide a description of all past, pending, or threatened litigation, including but not limited to malpractice claims, and all administrative, ethics, and disciplinary proceedings and other claims against respondent and any of the individuals proposed to provide services under this contract.
 13. Provide Proposer Contact Information Sheet (Attachment A)
 14. Cost Proposal (Attachment B), including narrative responses as indicated in the Cost Proposal
 15. Certification Regarding Debarment, Suspension, Proposed Debarment, And Other Responsibility Matters (Appendix 1)

DUE DATE

CAPECO requires respondents to submit proposals via email to aalexander@capeco-works.org no later than 5:00 PM PST on November 20, 2024.

COMMUNICATION, INTERPRETATION, AND ADDENDA

No respondent is entitled to rely upon any oral interpretation by CAPECO or its representative concerning the meaning of this RFP. This RFP and any addenda will be available by contacting the designated person listed within this RFP. It is the Respondent’s obligation to obtain any addenda that may be subsequently issued.

EVALUATION CRITERIA

CAPECO will conduct a comprehensive evaluation of proposals received in response to this RFP. CAPECO will use an evaluation committee to review and evaluate proposals. Throughout the evaluation and selection process, Proposers may be asked to furnish additional information, make oral presentations, attend meet as requested by CAPECO.

Proposals will be scored based on a total of 100 points using the following criteria:

Firm Experience & Staff Qualifications	30 Points
Demonstrated Understanding & Response to the Scope of Work	30 Points
Cost Proposal	30 Points
References	10 Points

DIVERSITY

Minorities, disadvantage, and Women-owned business enterprises (MBE/DBE/WBEs) are encouraged to submit proposals. CAPECO strives to provide opportunities to MBE/WBE/DBE's companies that have a diverse workforce and can supply products and services that will meet our business needs.

CONFLICT OF INTEREST AND VENDOR CODE OF CONDUCT

Respondents must disclose any past, present, or future relationships with any parties associated with the issuance, review, or management of this solicitation and anticipated award. Failure to provide this information may result in CAPECO removing respondent proposal from the selection process.

ADDITIONAL INFORMATION

All costs incurred in the preparation and presentation of Proposals are the responsibility of each respondent. All supporting documentation and manuals with each Proposal will become the property of CAPECO unless otherwise indicated by the Respondent at the time of submission.

CAPECO reserves the right to reject any and all proposals, to waive any informality, and to accept any proposals which may be deemed to be in the best interest of the organization. Furthermore, CAPECO may issue addenda, or waive any formalities that are not to be material defects requiring rejection or disqualification or where such a waiver will promote increased competition. Any respondents may be excluded from further consideration for failure to fully comply with the requirements of this solicitation.

TERMS AND CONDITIONS

CAPECO anticipates that it will work with the successful respondent to identify mutually agreeable terms and conditions.

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ATTACHMENT A
Contact Information Form

Proposers must provide a business contact and alternate to address any RFP questions.

Name:

Title:

Phone:

Fax:

Address:

Email:

Alternate Business Contact

Name:

Title:

Phone:

Fax:

Address:

Email:

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ATTACHMENT B
Cost Proposal

Respondents must submit the requested cost within their proposal. CAPECO will only accept proposals to provide property management services for all four of the properties.

Respondents must state their proposed fees on the following basis:

- Property management _____% of gross monthly income and/or
- Leasing _____% of first full month's rent and/or
- Lease Renewal Fee _____% of one month's gross income due upon renewal completion and/or
- Other

"Gross monthly income" shall be all gross billings from the operations of the property including rental receipts, late fees, application fees, pet fees, damages, lease buy-out payments, reimbursements by tenants for common area expenses, operating expenses and taxes and similar pass-through obligations paid by tenants.

In addition to the standard Cost Proposal, CAPECO will consider including, in a contract mutually acceptable terms, that reward the property manager for achieving certain operating performance goals. These may include:

- Economic Occupancy
- Occupancy Rate
- Cost Savings Metrics

For purposes of the proposal, please describe a proposed approach to award incentive fees based on achieving the goals identified above, including goal metrics. In addition, please provide specific examples including results that have been implemented with other clients to reward achievement of goals and/or reduce operational costs.

To encourage operating cost savings that do not diminish the level of property maintenance, CAPECO will consider including in a contract mutually acceptable terms that share in any net operating cost savings realized from recommendations made and implemented by the contractor. The cost savings are expressly contingent upon acceptance of the recommendation proposed by CAPECO. The contractor shall formally submit and identify the proposed cost savings including all related capital costs and a life-cycle cost analysis of the savings. For purposes of the proposal, please describe a proposed approach to award incentive fees in the manner described above.

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Example Reports

Respondents should identify reports to comply with reporting requirements under Financial Management.

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EXHIBIT 1

Properties Under Management

Applewood Village

549 NW 12th Avenue, Hermiston, Oregon
33 Affordable Housing Units
Low-Income Housing Tax Credit Program and HOME

Irrigon Farm Labor Housing

Scattered sites: four duplexes located in Irrigon, Oregon
8 Units of Farmworker Housing
Federal Home Loan Bank, Housing Trust Fund, Farmworker Tax Credit, Rural Economic
Community Development and Bank of America

Morrow Estates

220 Anderson Circle, Boardman, Oregon
40 affordable housing units
Low-Income Housing Tax Credit Program and HOME

Terwilliger Plaza

245 SW 5th, Pendleton, Oregon
22 affordable housing units designed for people with disabilities
Section 811 Capital Advance; Housing and Urban Development

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APPENDIX 1

**Certification Regarding Debarment, Suspension, Proposed Debarment, and Other
Responsibility Matters**

The Respondent certifies, to the best of its knowledge and belief, that:

The Respondent and/or any of its Principals:

- Are are not presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency;
- Have have not , within the three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property;
- Are are not presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses.
- Have have not , within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property; and

"Principals," for the purposes of this certification, means officers; directors; owners; partners; and person(s) having primary management or supervisory responsibilities within a business entity.

CERTIFIED BY:

Name of Organization:

Signature Authorized Official:

Title:

Date:

Printed Name: